

 **RELEASE NOTES**

Monarch Server 2023.1

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

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1. Welcome

Welcome to Altair Monarch Server release 2023.1.

This release is generally available from Nov 2023, following on from the previous 2023.0 release in May 2023.

This document provides an overview of the new features and enhancements provided by Monarch Server 2023.1 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.

Please ensure that the changes relating to Connectors in this version are reviewed prior to its implementation. This is relevant to those Customers who are upgrading from a previous release of Monarch Server and/or new installs intending on using DataPrep Studio (DPS).

NOTES:

- This is a major release. You must uninstall the currently deployed version and install 2023.1 wholly.
 - o The Monarch Server database can then be upgraded, and relevant settings applied to corresponding web.config / config.xml files relating to the instance.
 - o Please ensure the application database and if required, the web.config and config.xml files are backed up prior to the uninstall for reference or for regression.
 - o Post install, it is advised that end users of the MSAdmin, MSClient or RMSCClient based interfaces perform a clear browser cache activity to ensure outdated styles/scripts/resources are removed and ensuring the best performance & functionality of Monarch Server.

- 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.

- **Per the previous 2023.0 release of Monarch Complete & Monarch Server (Automator Feature), the following changes have been made to Data Connectors;**
 - o ***The Following Connectors have been deprecated:***
JIRA, Zendesk, Box, SugarCRM, Google Sheets, Google Ads & Google Drive
 - o ***implemented functional changes to the following Connectors:***
MySQL, NetSuite, Cassandra, Spark SQL Big Query, HubSpot, ServiceNow, SharePoint, OData, Active Directory

Altair highly recommends upgrading to the most recent available release 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 2023.1 is compatible with Monarch Complete/DPS 2023.1 and earlier. Please note,

- Monarch Server Assembly Version is 19.0.0.11
- The full version of Datawatch.SDK, which is used in the build, is 19.1.0.34497
- The full version of Datawatch.DataPrep.Engine, which is used in the build, is 19.1.0.34497

2. Monarch Server Upgrade

This section covers general principles for backup of the Monarch Server instance as part of any upgrade / migration activity. Note for Automator, please refer to the section '3. Monarch Server Automator - Upgrading or New Installation?'

An upgrade operation involves the backup, upgrade procedures per product documentation and potential for other bespoke operations relevant to the instance environment including possible reconfiguration activities. In the event of a problem the restore/recovery of the SQL Server based Application database is critical to the recovery.

As part of validating & completing the install/upgrade, there may be a need to perform activities on the SQL Server database instance via Management Studio. For this reason, familiarity with/experience of administrating a SQL Server instance and its connectivity/availability/maintenance is required by the person(s) carrying out the upgrade operation. Potentially, there may be the use of a fuller version of SQL Server as part of the Monarch Classic cache database configuration. This may need to be included as part of the upgrade considerations.

Before commencing an upgrade, the application database should be backed up to allow for regression if problems occur and cannot be resolved within the desired upgrade window.

Monarch Server can be deployed such that all components reside on one server, including its SQL Server Application database. However, you should ensure that for your upgrade, you identify if more than one server requires backup actions. Ensure also if there is a need to perform a separate SQL Server backup if you are using an external SQL Server instance.

The backup should be taken when the Altair Monarch Server services are stopped (Monarch Server Config Service and Monarch Server Agent Service). Where there is more than one server, then the Agent Service on all other servers hosting Modules must also be stopped (refer to your Configurator to determine your server(s) and their hostname(s)).

For Monarch Server Report Warehouse & Automator in particular, there may be a need to validate and monitor the inputs to ensure post restart, all required inputs are present and will commence processing to allow for a complete and accurate catchup of pending inputs as well as subsequent newly delivered inputs. The mechanisms for this will vary depending on the input types as well as the storage/delivery methods used to make the inputs available to Monarch Server. Altair Support or Professional Services can assist with any questions or queries on this aspect.

If using Virtual Servers, then snapshots are also viable. However, these should also be taken when the services are stopped to ensure the snapshot is in a clean, restorable state. These will be used to perform a 'point-in-time' recovery should they be used. This means for Monarch Server Report Warehouse and Automator, there may also be a need to ensure any inputs delivered post this 'point-in-time' may need be captured and restored to enable 'catchup' of processing deferred during the upgrade downtime.

3. Monarch Server Automator - Upgrading or New Installation?

In the previous version 2023.0 of the Monarch Product family, changes were made to the data Connectors. These changes are reflected in 2023.1 also.

A summary of changes made to Connectors are,

- The following Connectors have been deprecated.
JIRA, Zendesk, Sugar CRM, Google Sheets, Box, Google Ads, Google Drive
- The following Connectors have had their functionalities modified.
MySQL, NetSuite, Cassandra, Spark SQL Big Query, HubSpot, ServiceNow, SharePoint, OData, Active Directory

The Monarch Server 2023.1 installers (Single Server or Advanced) can be used to perform the following.

- a new install of Monarch Server, with an empty database, or
- to perform a clean install of Monarch Server and then point to and upgrade an existing database to the latest version.

Please review the following information relating to a clean install or upgrade before proceeding.

Clean Installation

If you are performing a new / clean install and creating a new, empty database, and thereafter using Workspaces created / edited in Monarch Complete 2023.1 or higher, you can proceed with no further checks required. Workspaces created in Monarch DPS 2023.1 reflect the changes made by default and will therefore be compatible with Monarch Server 2023.1 accordingly.

Upgrading Monarch Server

This installer may be used as part of upgrading from a previous version of Monarch Server. If the previous version is 2022.0.2 or lower, then there is the possibility of Processes, Workspaces, Change Lists or Exports using the affected Connectors listed above.

If you are performing an upgrade and will be using a database from Version 2022.0.2 or lower of Monarch Server, then you must complete one of the following before proceeding:

- have reviewed the release notes and confirm that you are **not** affected by the connector changes implemented in Monarch Server 2023.0 and above (i.e., you do not use any of the affected Connectors)
- and / or have used the Monarch Server Inspector Tool to verify the existing database is **not** affected by the connector changes and no issues were identified.
- and / or have used the Monarch Server Inspector Tool to verify the existing database was affected by the connector changes and any issues have been **identified and have been or will be addressed** accordingly.

NOTE: If the Inspector Tool is not used / identified issues not addressed, then Visual Processes affected by the connector changes may fail to run or, report errors.

If you require assistance, please refer to the Installation Guide or Release Notes for this version. The Release Notes contain a full list of new features, changes, bug fixes & known issues.

Alternatively, you can contact Altair DA Support here; <https://community.altair.com/community>

4. 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 release will be Altair Monarch Server 2023.x and 2022.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

5. 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.

5.1. 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 2023.1 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, Veracode Static Application Security Testing (SAST), Veracode Software Composition Analysis (SCA), OWASP Dependency Track & WebInspect Dynamic (PCI Data Security 3.2.1) scans for vulnerability issues were used to ensure that no significant risks for security breaches were apparent and appropriate remedial work undertaken to address issues found accordingly.

6. 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 2023.1.

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

6.1. Installation and Upgrade

Support of newer technologies that are reflected in this release of Altair Monarch Server 2023.1:

- Update of internal ORM to Linq2DB

6.2. Deprecated Functionality

Deprecation of older technologies are reflected in this release of Altair Monarch Server 2023.1:

- N/A

The following Connectors have been deprecated per parent 2023.0 release:

- *JIRA, Zendesk, Box, SugarCRM, Google Sheets, Google Ads & Google Drive*
- *Any visual processes utilizing these connectors will fail with error advising of the same in the job log. Likewise, the Inspector Tool will advise of the same as part of its scan summary.*

6.3. Altair Monarch Complete SDK/Engine alignment

Altair Monarch Complete 2023.1 was released in Nov. 2023.

To align with the desktop tools, Altair Monarch Server 2023.1 makes use of the Altair Monarch Complete 2023.1 SDK engines accordingly (also referred to as the Monarch Classic and Data Prep Studio SDKs).

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>).

In the prior 2023.0 release of the Monarch Product family, changes were made to the data Connectors.

A summary of changes made to Connectors are,

- The following Connectors have been deprecated:
JIRA, Zendesk, Sugar CRM, Google Sheets, Box, Google Ads, Google Drive
- The following Connectors have had their functionalities modified:
MySQL, NetSuite, Cassandra, Spark SQL Big Query, HubSpot, ServiceNow, SharePoint, OData, Active Directory

Monarch Server 2023.1 is compatible with Monarch Complete/DPS 2023.1 and earlier. Specifically,

- If using workspaces created in Monarch DPS 2023.1, these will be compatible with Monarch Server 2023.1
- If using workspaces created in an earlier version of Monarch DPS (2022.1 or lower) and **upgraded** in Monarch DPS 2023.1, these will be compatible with Monarch Server 2023.1
- If using workspaces created in an earlier version of Monarch DPS (2022.1 or lower), that utilise one or more of the connectors listed above and **not upgraded** in Monarch DPS 2023.0, these will **NOT** be compatible with Monarch Server 2023.1. Visual Processes that utilise these workspaces will fail accordingly.

For Monarch Server 2023.1:

- Monarch Server Assembly Version is 19.1.0.10
- The full version of Datawatch.SDK, which is used in the build, is 19.1.0.34497
- The full version of Datawatch.DataPrep.Engine, which is used in the build, is 19.1.0.34497

6.4. 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 comply with major regulatory requirements and industry standards more easily.

Vulnerability code scans were performed on Altair Monarch Server 2023.0 using a combination of:

- Veracode Static Application Security Testing (SAST) - Auto-update PCI Policy
- Veracode Software Composition Analysis (SCA)
- OWASP Dependency Track
- WebInspect Dynamic (using PCI Data Security 3.2.1 - AllCheck policy (Includes all the PCI vulnerabilities))

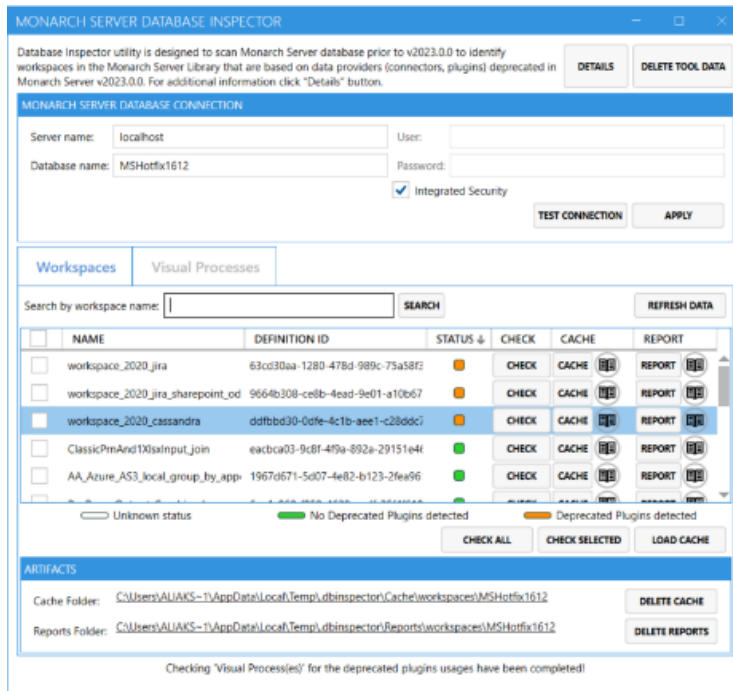
Scans for vulnerability issues are used to ensure that no significant risks for security breaches were apparent and appropriate remedial work undertaken to address issues found accordingly.

7. New Features / Changes

An overview of major new features / improvements follows.

7.1. Create utility for scanning Monarch Server Library (database) for deprecated / modified connectors (DST-3158) (Repeated from 2023.0 Release Notes for functional awareness)

'Database Inspector Utility' (DIU) is a tool for scanning an existing 'Monarch Server Library' (database) is required to assist with determining if an instance has objects that are making use of the connectors affected as part of the 2023.0 release.



The following Connectors have been deprecated:

- JIRA, Zendesk, Sugar CRM, Google Sheets, Box, Google Ads, Google Drive

The following Connectors have had their functionalities modified:

- MySQL, NetSuite, Cassandra, Spark SQL Big Query, HubSpot, ServiceNow, SharePoint, OData, Active Directory

Prior to performing an upgrade, the tool should be used, in conjunction with Professional Services or Support to ascertain what objects are affected and thereafter, the remedial work required to enable the instance to be upgraded with all functionalities retained.

Note, the tool will be provided upon request from either Professional Services or Support. It is critical that Altair has awareness of the upgrade intentions and help with reviewing the output to help ascertain any subsequent upgrade considerations.

The tool will check for the following in the Server Library.

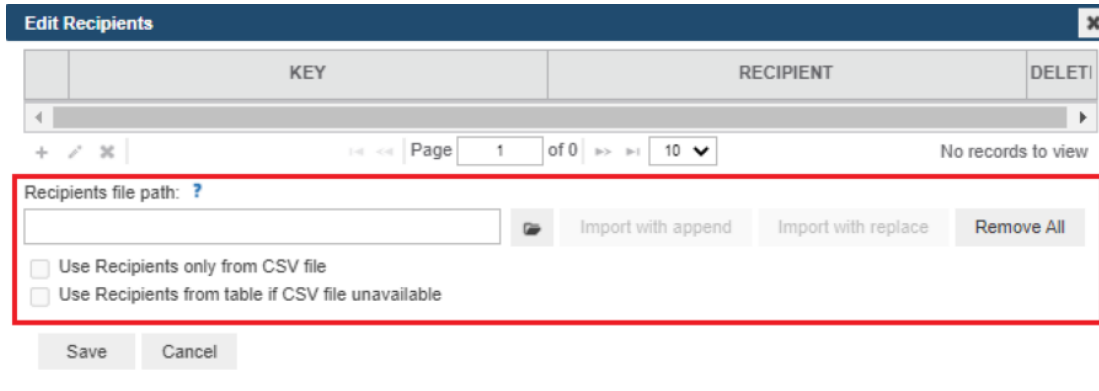
- workspaces that contain load plans based on the affected Connectors.
- 'DataPrep Export' items in visual processes that use load plans that in turn, are based on the affected Connectors.

It is expected that DIU tool will be executed before updating to from Monarch Server Automator versions lesser then 2023.0 and upgrading thereafter to 2023.x or above.

7.2. Enhance Email By Key to read key,email address pair from a delimited file (DST-2234)

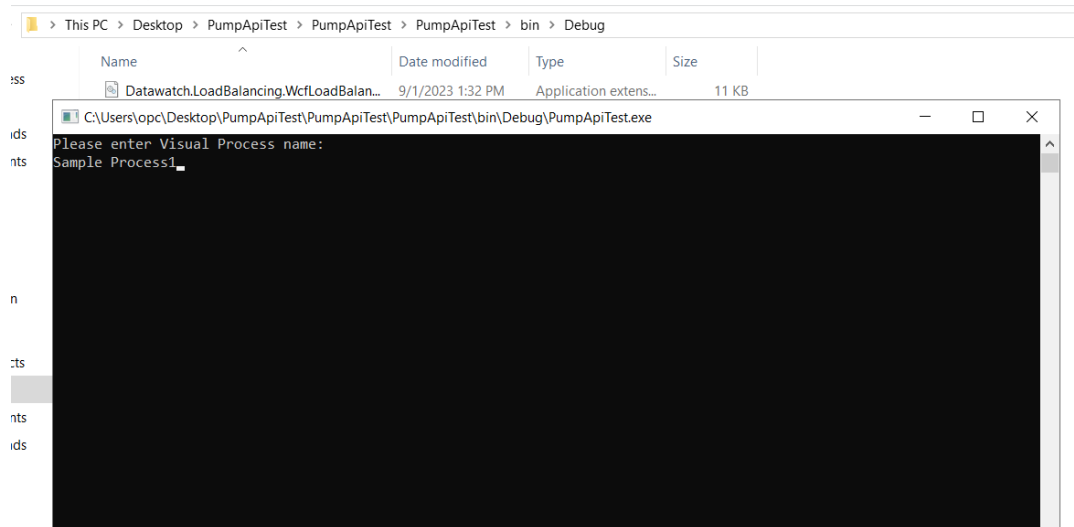
When the email by key field option is used, the user must manually enter key and email address. This is a minor effort for a small number of entries. However, if the user needs to add hundreds of email address and subsequently maintain the same, it becomes tedious.

We have enhanced the email by key option and read keys and email addresses by enabling the loading of same from a delimited file.



7.3. PumpAPI. Add VP support (DST-2925)

Monarch Server Automator API now supports ability to invoke jobs for both Standard and Visual Processes;

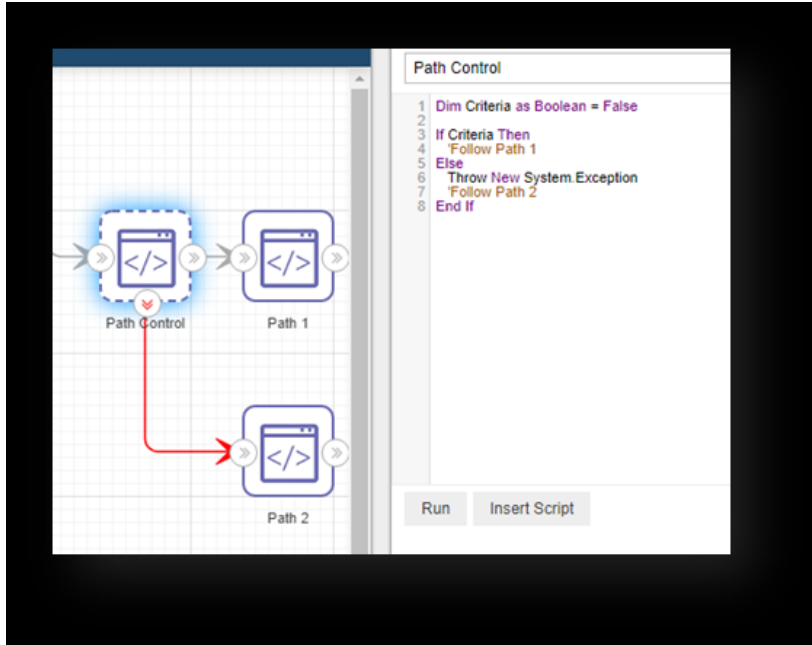


7.4. Elegantly controlling the exit node of a script (DST-2960)

In Visual Processes, we now have the ability to define exit nodes in a script to allow for flow control of the process based on the script logic. So for example;

```
Try  
  If Criteria Then  
    Api.ExitNode(1)  
    'Follow Node 1  
  Else  
    Api.ExitNode(2)  
    'Follow Node 2  
  End If  
Catch  
  Throw New System.Exception  
End Try
```

Resulting in conditional flow control and greater flexibility within the script logic / process flow capabilities;



8. Full List of Fixes / Improvements

8.1. General Fixes / Improvements (6)

Type	ID	Summary
Bug	DST-2891	SP and VP could start to throw "Access denied" errors for External Lookups
Bug	DST-3337	Incorrect Spelling of BulkBehaviorExportCommandTimeout in Automator Dispatcher Host
Improvement	DST-3241	Update Version of MsSqlCmdLnUtils_x64.msi included with prerequisites
Improvement	DST-3242	Update version of MSODBCSQL_X64.MSI included with prerequisites
Improvement	DST-3395	Doc: Update SQL Server Command Line Tool version in Install guide
Improvement	DST-3396	Doc: Update MS ODBC Driver for SQL Server version in Install guide

8.2. Automator Fixes / Improvements (30)

Type	ID	Summary
Bug	DST-2571	System cannot retrieve web model information on the properties panel if credentials were entered after Credentials item was connected to Web Model item
Bug	DST-2653	It's impossible to open editing SQL plugin window of workspace with several load plans a second time once user has already opened it
Bug	DST-3049	It's impossible to open visual process after "Report Warehouse" trigger is set up
Bug	DST-3185	When using workspaces and a hub set to Individually, verification fails for all subsequent files, once triggered.
Bug	DST-3293	Error in Script Editor in Project Editor in Standard Processes
Bug	DST-3296	Error in Script in Visual Processes.
Bug	DST-3334	No available summary in Summary drop-down list of Export Option
Bug	DST-3339	Dataprep Export nodes export destination filename does not honor &[script.variable]

Type	ID	Summary
Bug	DST-3347	Verify Workspace not working as expected
Bug	DST-3357	Error when clicking 'Import with append' button of Edit Recipients dialog
Improvement	DST-2176	Support SQL Server SSL Protocol
Improvement	DST-2177	Support Oracle SSL Protocol
Improvement	DST-2234	Enhance Email By Key to read key,email address pair from a delimited file.
Improvement	DST-2925	PumpAPI. Add VP support
Improvement	DST-2960	Elegantly controlling the exit node of a script.
Improvement	DST-3019	Import Excel Export From Workspace should have an ability to import Excel Advanced setting
Improvement	DST-3234	VP API: Add ability to cancel visual processes
Improvement	DST-3324	Update IExportResults interface to improve job logs
New Feature	DST-2206	Disable Process Alerts
New Feature	DST-3236	Add option to enable 'Advanced' Excel features from Workspace Defaults
New Feature	DST-3302	Support default HTTP credentials
New Feature	DST-3303	Support default FTP credentials
New Feature	DST-3309	Display workspace information
New Feature	DST-3310	Apply workspace settings
Improvement	DST-3259	DOC: Add note about web input
Improvement	DST-3290	Doc: Add info about ability to import Excel Advanced setting

Type	ID	Summary
Improvement	DST-3291	Doc: Add info about ability to import recipients from a CSV file.
Improvement	DST-3369	DOC: Describe workspace information similar to model information
Improvement	DST-3379	DOC: Add note about HTTP Credentials
Improvement	DST-3380	Doc: Add info about Default FTP credentials

8.3. Report Warehouse (Formally Content Server) Fixes / Improvements (0)

Type	ID	Summary
Bug	DST-3252	Impossible to save 'Filing Notification' with 'Run immediate' option enabled
Bug	DST-3253	Error is not displayed when try to save schedules where past date specified
Bug	DST-3277	"Select None" button not working in Views selection/deselection pages

8.4. Report Mining Server (RMS) Fixes / Improvements (0)

Type	ID	Summary
No RMS specific items in this release.		

9. Known Issues

The following known issues are intended to be fixed in a subsequent release of Altair Monarch Server. The next planned release (2024.0) is expected for 2024 H2.

9.1. Monarch Server General

Category	ID	Summary
Bug	DST-2857	Unexpected Service termination / Server shutdown prevents modules restarting due to corrupt [module].exe.config files
Bug	DST-3227	Vulnerability in TinyMCE Component found in OWASP Dependency Track scan for Monarch Server 2022.0

9.2. Automator

Category	ID	Summary
Bug	DWCHIS-3268	Invalid characters in Pre/Post Processing Scripts preventing Project opening in Project Editor

9.3. Report Warehouse

Category	ID	Summary
Bug	DST-2608	CS: Offline Tasks - mail client is NOT opened by clicking on "mail" icon

9.4. RMS

Category	ID	Summary
N/A		

9.5. Automator

Category	ID	Summary
Bug	DST-2091	VPD: Error occurred during process (with Content System triggers) load
Bug	DST-2113	Compatibility: it's not possible to open Automator project with Named Paths in Monarch Classic
Bug	DST-2169	Export all processes failed if there are different Format and Location at the machine
Bug	DST-2179	VPD: mapping does not work properly for DataPrep Export to Microsoft Access
Bug	DST-2237	VPD: Load Plans have reverted to the original filename input after update db
Bug	DST-2238	Cancelled process state was changed to Completed for all processes after update of DB
Bug	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.
Bug	DST-2296	In certain process configuration some data prep exports in sequence produce no action and no error :just start and finish
Bug	DST-2367	VPD: Standard Process item - Log Status is empty when the job completed successfully
Bug	DST-2417	Cannot save new Custodian Schedule if name is longer than 27 characters
Bug	DST-2557	VPD: DataPrep Export to Excel - Values have been rounded for "Column Mapping" option. Different results for "Export All" and "Column Mapping".
Bug	DST-2559	Job is completed with "System.NullReferenceException" error during distribution of some excel table
Bug	DST-2567	Selected 'Location' in 'Set Destination Path' dialog is not being saved
Bug	DST-2581	System can't retrieve table's name of database input while using "Process name" macro in path name
Bug	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.
Bug	DST-2680	looping issue with Visual Process object
Bug	DST-2681	Dropping file to upload and Browse Server options in Server Library > Workspace > Replace Path dialog are not working in Automator

Bug	DST-2704	Process with workspace completes with an error when starting by manifest
Bug	DST-2748	When unable to delete SQL Server table, "Overwrite" option silently "Appends".
Bug	DST-2855	3 Vulnerabilities in Trirand.jqGrid component found in OWASP Dependency Track scan for Monarch Server 2022.0 and 2021.1.2
Bug	DST-2948	SP: fix confusing Job Log status
Bug	DST-3024	When a new workspace with Oracle settings uploaded to the server library the Visual process still uses the previous Oracle settings in the Workspace node.
Bug	DST-3028	SP: "Export all" checkbox stays checked after "Cancel" button is clicked
Bug	DST-3029	Standard Process: [Summary] macro is not displayed in the table name when exporting all summaries by table
Bug	DST-3030	No information about execution SystemAlertDistributionError alert in the logs of standard process
Bug	DST-3052	Data captured via Excel Worksheet Design (Excel Trapping) and then use it as input in an Automator process will display an error "The given key was not present in the dictionary."
Bug	DST-3112	Multiway export options validation doesn't work properly for SAS Transport Format export type
Bug	DST-3134	It's impossible to save Filing Tasks Path in System Defaults if "Browse" button was used
Bug	DST-3142	Visual Process hangs and timeout when trying to open after upgrade to 2021.1.2 due to metadata exceeding browser capabilities.
Bug	DST-3238	Vulnerability in jQuery.UI.Combined component found with in OWASP Dependency Track scan for Monarch Server 2023.0
Bug	DST-3257	VP: tooltip border of Save, Save As and Alerts is too big (in Firefox only)
Bug	DWCHIS-3268	Invalid characters in Pre/Post Processing Scripts preventing Project opening in Project Editor