



Altair<sup>®</sup> Monarch<sup>®</sup> 2023 INSTALLATION AND ACTIVATION GUIDE

#### TABLE OF CONTENTS

Introduction	1
System Requirements	2
Monarch 32-bit vs. 64-bit	2
Minimum Requirements	3
Recommended Specifications	3
Running the Setup Program	4
Installing Monarch	4
Installing and Using Monarch in a Citrix Environment	8
System Setup	8
Supported Citrix Versions	8
Installation	8
Activation	9
Post-Installation Steps	9
Configuring Profile Management	9
Deployment	. 11
Creating a Machine Catalog	. 11
Creating a Delivery Group	. 16
Launching the Monarch Application	. 20
Activating Monarch	. 23
The Altair Monarch License Manager	23
Activation Methods	23
Activating Monarch Through a Firewall	. 24
Using Monarch in Trial Mode	. 24
Activation via an Altair License Management System	. 25
Managed Licensing	. 26
Activation Key	. 29
License File	. 31
Local Licensing	. 32
Student Licenses	. 33
Advanced Licensing Methods	. 33
Managed Licensing	. 34
Activation Key	. 34
License File	. 35
Activation Using a Monarch License Server	. 38
Activating Monarch via the Monarch License Server	. 38
Implementing License Server Mirroring	. 40
Using Monarch With Monarch License Server	. 41
Activation Using a Volume License Key File	. 41



Activating Monarch Using an Activation Code	43
Activating Monarch Online	44
Activating Monarch Offline	45
Activating Monarch via E-mail or Phone Support	48
Configuring Proxy Server Settings	49
Specifying Logging Levels	50
Specifying HTTPS Settings	51
Deactivating Monarch	52
Deactivating Monarch Using the Altair License Management System	52
Deactivating Monarch Online	53
Deactivating Monarch Offline	55
Deactivating Monarch via E-mail or Phone Support	56
Configuring Logging	57
Configuring Security Protocols	58
Disabling/Enabling Legacy and Nalpeiron Licensing Methods	59
Viewing Computer Information	61
Upgrading Monarch	62
Contacting Altair Sales	63

# INTRODUCTION

Altair<sup>®</sup> Monarch<sup>®</sup> is the world's most-used self-service data preparation solution. It is the fastest and easiest way to extract data from any source – including turning unstructured data, such as PDFs and text files, into rows and columns. Once data are extracted, you can clean, transform, blend, and enrich the data using a click-based interface, free of coding and scripting, and export to various platform for reporting and visualization. Then, you can automate the entire process, so you never have to do it again.

Monarch offers the following features:

- □ Access any complex data
- □ Easy, click-driven data prep with 80+ pre-built functions without the need for scripting or macros
- Blend and join disparate data.
- □ Eliminate manual work and human error.
- Unmatched report trapping of PDF and text-based reports.
- Automate repeatable work with reusable "recipes"
- □ Export to various business intelligence or analytics platform
- □ Auditable through a full change history and complete lineage

This guide will take you through the installation and activation process of Monarch version 2023.x.

# **SYSTEM REQUIREMENTS**

To install Monarch successfully, we suggest that your system meet or exceed the recommended specifications. Administration rights and permissions are required to install Monarch.

### **MONARCH 32-BIT VS. 64-BIT**

Monarch is available as a 32-bit or 64-bit application. By default, the bitness of the application is matched with the bitness of Microsoft Office, specifically the Access Database Engine (ADE) component, if this suite is available prior to the installation of Monarch. You can select which bitness to apply during Monarch installation. However, note that mismatches between the bitness of the application and the bitness of the ADE component may cause Monarch to be unable to read and write Microsoft Access data sources.

ALTAIR MONARCH 2023	–
	Welcome
	Altair Monarch® 2023 64-bit installation
	Welcome to the Altair Monarch® 2023 Installation program.
Altair	The installation process is straightforward and should take less than 5 minutes.
Monarch	Once Monarch is installed, you will be prompted whether you want to start a trial, or license the product.
	The Altair Monarch Installation wizard will now guide you through the installation process.
	Choose installation bitness: O 32-bit
	Click Next to continue.
	Next

If the ADE component is not installed prior to installing the application, Monarch will install ADE according to the Monarch bitness selected.

### **MINIMUM REQUIREMENTS**

- □ Windows 10, Windows Server 2016/2019
- □ .NET Framework 4.8/4.7.2 (Full Installation)
- □ Microsoft SQL Server 2017 LocalDB version 14.0.3238.1, Microsoft SQL Server Express 2016/2017/2019
- Microsoft Access DB Engine Runtime
- 4 GB RAM
- □ 1.5 GB disk space for installation when prerequisites are in place
- □ 5 GB disk space for installation on a clean machine or when upgrading from .NET Framework 4.5
- □ Sufficient disk space for temporary workspace if dealing with large reports
- Pentium 4 CPU
- Google Chrome, Firefox, Microsoft Edge (Chromium version)

### **RECOMMENDED SPECIFICATIONS**

- Windows 10 64-bit
- .NET Framework 4.8 (Full Installation)
- Microsoft SQL Server 2017 LocalDB version 14.0.3238.1
- Microsoft Access DB Engine Runtime
- 8 GB RAM
- 1.5 MB disk space for installation when prerequisites are in place
- □ 5 GB disk space for installation on a clean machine or when upgrading from .NET Framework 4.5
- □ Sufficient disk space for temporary workspace if dealing with large reports
- □ 2.0 GHz or faster processor
- Google Chrome (latest version)

# **RUNNING THE SETUP PROGRAM**

The Altair Monarch installer will guide you through the installation process via a series of screens. Each screen will require a prompt to advance to the next screen.

### **INSTALLING MONARCH**

#### Steps:

1. After downloading the installer, run (or double-click on) the install program.

A series of prompts will lead you through the installation process.

2. The first of these prompts introduces you to the installation program and reminds you of the need to either activate your copy of Monarch or use Monarch on a trial basis after you finish installing the application.

ALTAIR MONARCH 2023	_ = ×					
	Welcome					
	Altair Monarch® 2023 64-bit installation					
	Welcome to the Altair Monarch® 2023 Installation program.					
Altair	The installation process is straightforward and should take less than 5 minutes.					
Monarch	Once Monarch is installed, you will be prompted whether you want to start a trial, or license the product.					
	The Altair Monarch Installation wizard will now guide you through the installation process.					
	Choose installation bitness: O 32-bit • 64-bit					
	Click Next to continue.					
	Next					

You must select a Monarch bitness to install before proceeding to the next screen.

Once a bitness has been selected, subsequent installations or upgrades will apply this selection automatically; the installer will no longer ask you to select a bitness.

3. The second prompt requires you to accept the Monarch end-user license agreement before proceeding with the installation.



4. The third prompt allows you to specify whether Microsoft Access Database Engine should be installed with the application.

ALTAIR MONARCH 2023		-		×
	Prerequisites Configure Prerequisites			
Altair Monarch	<ul> <li>✓ Microsoft SQL Server LocalDB</li> <li>✓ Microsoft Access Database Engine</li> </ul>			
	Back	Ne	ext	_

Deselecting the Microsoft Access Database Engine option displays a warning icon. Hovering over this icon shows the following message.



If you wish to proceed with the installation, click Next.

5. The fourth prompt asks you to specify a folder in which to store application files and whether the sample lesson files should also be installed. It also asks whether to install the Altair License Management Utility.

This utility provides users with comprehensive Altair licensing functionality, including the ability to obtain HostIDs, manage license borrowing and returns, and manage product activation, both online and offline.

ALTAIR MONARCH 2023	-	- = ×
	Install Location	
	Specify Altair Monarch 2023 ins	tall
	location	
Altair	Install application files to:	
Monarch	C:\Program Files\Altair Monarch 2023	Browse
	☑ Install Sample Files	
	☑ Install ALM Utils Ø	
	Back	nstall

When you click **Install** in the third installer prompt, the installation proper begins. This step may take some time.

ALTAIR MONARCH 2023	×
	Please wait
	This may take several minutes
Altair Monarch	Acquiring:
	Executing package Altair Monarch® 2023
	Applying:
	1: 0 2: 1033 3: 1252
	Cancel

**NOTE** The installer will check if your machine has all the prerequisites necessary to install Monarch. If some prerequisites are not available, the installer will attempt to install these. You will need to confirm these installations before proceeding with installing Monarch.

If installation is successfully completed, the following screen is displayed.

ALTAIR MONARCH 2023	_ = ×
	Process completed
	The Wizard has successfully installed
	Altair Monarch® 2023
Altair Monarch	☑ Launch Altair Monarch® 2023 □ Show Installation Log
	Finish

# INSTALLING AND USING MONARCH IN A CITRIX ENVIRONMENT

#### System Setup

When deploying Monarch in a Citrix environment, Monarch is ideally installed in a machine that belongs to one delivery group and the License Server is installed in another machine that belongs to another delivery group. Such a setup will ensure increased security when Monarch is used by all authorized users. Both delivery groups must be within the same domain.

#### **Supported Citrix Versions**

Monarch may be used on all server and client applications currently supported by Citrix. More information on this topic may be found <u>here</u>.

#### Installation

Installing Monarch in a Citrix environment is no different from installing Monarch in a Windows environment. An Installation Wizard will guide system administrators during the installation process.



When Monarch is installed in a specific machine, all of the samples files, including reports, models, and data, are installed in the default location applied in Windows environments (typically C:\Users\Public\Public Documents\Altair Monarch).

#### Activation

Installations of Monarch in Citrix can be activated via an Altair License Management System (i.e., <u>managed licensing</u> or <u>on-prem license server</u>) or <u>Monarch License Server</u>. Activation using a standalone license file or activation key/code is currently not supported for Monarch installations in Citrix.

Activation is performed in the Citrix virtual machine in which Monarch is installed.

#### **Post-Installation Steps**

Once installed, Monarch must be published using Citrix Studio to allow other users access to it.

Citrix Studio can be used to add Monarch Classic, Data Prep Studio, and Monarch Utility as applications.

Citrix Studio						- 🗆 X
File Action View H	lelp					
◆ ◆ 2 🖬 🛛 🖬						
Citrix Studio (Local Farm)				Search	Ø Saved searches →	Actions
Machine Catalogs						Applications 🔺
B Delivery Groups	Show all	Name +	Description	Source	State	Add Applications
Applications	▼ Application Folders	Citrix Director	Citrix Director	Master Image	Enabled	Create Application Group
Policies	Applications	Citrix Provisioning Boot		Master Image	Enabled	View
> Configuration	Application Groups	Citrix Provisioning Cons		Master Image	Enabled	Defresh
, ,	Admin Apps	Citrix Studio	Launches the Citrix I	Vanag Master Image	Enabled	Keiresh
	User Apps	Citrix XenCenter		Master Image	Enabled	Help
		X Excel		Master Image	Enabled	Selection
		Google Chrome	Access the Internet	Master Image	Enabled	Applications
		C Microsoft Edge		Master Image	Enabled	Applications
		Monarch 2022 Utility		Master Image	Enabled	Create Folder
		Monarch Classic 2022		Master Image	Enabled	Citrix Director
		Monarch Data Prep Stu		Master Image	Enabled	Properties
		Notepad++		Master Image	Enabled	Duplicate Application
		OneNote OneNote		Master Image	Enabled	Disable
		Outlook		Master Image	Enabled	Disable
		PowerPoint		Master Image	Enabled	💷 Rename
		Not the Connector 1		Master Image	Enabled	🚽 ቝ Manage Tags
		NDP To Connector2		Master Image	Enabled	🔹 Delete
		NDP To SQL1		Master Image	Enabled	Move Application
		NDP To XD1		Master Image	Enabled	
		🛱 Session Recording Player		Master Image	Enabled -	, 🛛 Help
	Details - Citrix Director					1
-	Details Groups Sessio	ns Administrators				
	Application					
	Name (for administrator):	Citrix Director	A	Application Path:	%ProgramFiles(x86)%\Internet Explo	
	Name (for user):	Citrix Director	C	Command line arguments:	https://xd1.citrix.lab/Director	
	Description: Folder (for administrators)	Citrix Director	V F	Vorking directory: Redirected file types:	%ProgramFiles(x86)%\Internet Explo	
	Folder (for user):	-	, T	ags:		
	Visibility:	Domain Admins (CITRIX\D	omain Admins)	Aaximum concurrent instances:	Unlimited	
	Ignore user's home zone:	No	h	/laximum instances per user:	Unlimited	
L	1					

#### **CONFIGURING PROFILE MANAGEMENT**

The Monarch application uses LocalDB to cache the logon data of users. This database is stored in a user's local profile. During a Monarch session, UPM actively works in the server to cache the data in the user's local profile. In some cases, Monarch is unable to detect the location of LocalDB and, therefore, cannot launch properly. The following steps describe how to specify user profiles via an ADM template file and the location of LocalDB to allow Monarch to launch.

Steps:

1. Using Citrix WEM Console, go to Policies and Profiles > Citrix Profile Management Settings and check Enable Profile Management Configuration.

	Citrix Workspace Environment Management	= x
Home About		
🛅 Configure license server 👔 Get Help	Options 🖾 About	
License Management Support S Lo	kal Settings 😰 about Citrix Workspace 16	
Policies and Profiles	Main Citrix Profile Management Settings Profile Container Settings Profile Handling Advanced Settings Log Settings Registry File S	yst 🔍 🕨
Environmental Settings	Citrix Profile Management	
Microsoft USV Settings	C Enable Profile Management Configuration	
Citrix Profile Management Settings	Profile Management	
	🗐 Enable Profile Management	
	Set processed groups	
	Add	
	Kemove	
Actions	Set excluded groups	
Filters	Add	
	Remove	
Assignments	Process logons of local administrators	
System Optimization	Set path to user store  Migrate user store	
Policies and Profiles	Absolute path or path relative to the home directory Path to the previous user store	
Security	Windows	
Active Directory Objects	Enable active write back	
Transformer Settings	Enable offine profile support	
Advanced Settings		
Administration	Actions	
Monitoring	Apply Cancel	
Connected to : admin	Current access level : Global Full	Access

2. Go to the Profile Handling tab and check Delete locally cached profiles on logoff.

	Citrix Workspace Environment Management	>
Home About Connect Disconnect Disconnect Infra. Service G	efault Site	
Policies and Profiles  Policies and Profiles  Province Strain Str	Man Citix Profile Management Settings       Profile Container Settings       Profile Handing         Profile Handing <ul> <li>Ø</li> <li>Delete locally cached profiles on logoff</li> <li>Set delay before deleting cached profiles</li> <li>Delay in seconds</li> <li> <ul> <li>Beable migration of existing profiles</li> <li>Type of user profiles to be migrated if the user store is empty</li> </ul> </li> </ul>	s Registry   File Syst 4
Actions  Filters  Assignments System Optimization	None     Automatic migration of existing application profiles     Denshe local profile conflict handling     If both a local Windows user profile and a Othix user profile exist in the user store     Use local profile     Profile     Enable Template Profile	
Policies and Profiles Security Active Directory Objects Transformer Settings	Template Profile Path Template profile overrides local profile Template profile overrides roaming profile Template profile used as Otrix mandatory profile for all logons	
Advanced Settings Administration Monitoring	Actions Apply	Cancel
Connected to : admin	Current ac	cess level : Global Full Access

- 3. Go to the Synchronization tab and check Enable Directory Synchronization.
- 4. Add the following Monarch folders.
  - \AppData\Local\DataPrepStudio
  - \AppData\Local\Microsoft\Microsoft SQL Server Local DB\Instances\Datawatch.Engine.14.0\
  - \AppData\Local\Monarch

	Citrix Workspace Environment Management	_ = X
Home About		
Configure license server 🕢 Get Help	T Options About	
License Management is Support is Lo	ocal settings is product unix workspace is	n Setti 🔶 🕨
Policies and Profiles	Synchronization	
Microsoft USV Settings	C Enable Directory Synchronization	
Gitrix Profile Management Settings	AppData/Local/DataPrepStudio/	Add
	AppData Local Monarch	emove
	Enable Hie synchronization	
		Add
Actions		emove
Filters		
Assignments	Enable Folder Mirroring	
System Optimization		Add
Policies and Profiles		enove
Security	Enable Large File Handling	
Active Directory Objects		Add
Transformer Settings		Remove
Advanced Settings		
Administration	Actions	
Monitoring	Apply Can	el
Connected to : admin	😲 Current access level : Global i	ull Access 🛒

#### Deployment

Two steps are generally necessary to deploy Monarch in a Citrix environment:

- □ Create a Machine Catalog
- Create a Delivery Group

The following sections describe the details of each of these steps. In these sections, we assume that Monarch has been installed in a machine that is to be added to a machine catalog.

#### **CREATING A MACHINE CATALOG**

A machine catalog is a virtual or physical machine that can be assigned to a user to allow access to one or several applications.

Steps:

1. Login to the server where Citrix Studio has been installed. Log in as an Administrator and make sure you have administrative rights before proceeding.

File Action View Help				- 🗆 🗡
🗢 🔿 📰 🖬				
🗱 Citrix Studio (Local Farm)				Actions
Search				Citrix Studio (Local Farm)
Machine Catalogs     A Delivery Groups	Common Tasks Actions PowerShell Studio Help			View •
Applications			And a Name of Street of Street	Q Refresh
Policies Configuration Administrators Hosting Hosting	Common Tasks Use this screen to perform common maintenance tasks.			Part Help
StoreFront	Site configuration			
Zones	Task	Administrator	Time	
	Create Machine 'Connector1_1' in Delivery Group 'Connector1'	CITRIX\DemoAdmin	6/15/2022 : 4:23:02 AM 🔷	
	Create Delivery Group 'Connector1'	CITRIX\DemoAdmin	6/15/2022 : 4:23:00 AM	
	Create Machine Catalog 'Connector1'	CITRIX\DemoAdmin	6/15/2022 : 4:21:16 AM	
	Create 3 Applications	CITRIX\DemoAdmin	6/14/2022 : 3:56:03 AM	
	Machine catalogs		Test site	
	Admin Desktop	1 Machine	<u> </u>	
	Altair Windows 2016	1 Machine		
	Connector1	1 Machine		
	Linux Desktop	1 Machine		
	Windows 10 Single Deskton	2 Machines	Update master image Test catalog	
	Delivery groups			
	Admin Desktop	1 Machine	<b>^</b>	
	Connector1	1 Machine		
	Linux Desktop	1 Machine		
	Windows 10 Single Desktop	1 Machine		
			View machines Test delivery group	

2. In Citrix Studio, select Create Machine Catalog from the Actions menu.

						Act	tions
h						Ma	achine Catalogs
ine Catalogs	Machine Catalog	+	Machine type	No. of machines	Allocated machines	1	Create Machine Catalog
cations	Admin Desktop		Multi-session OS	1	1	17	View
ies	Allocation Type: Random		User data: -	Provisioning method	: Manual		view .
ing	Altair Windows 2016		Multi-session OS (Virtual)	1	0	0	Refresh
iguration	Allocation Type: Random		User data: On local disk	Provisioning method	: Manual	?	Help
ministrators	Connector1		Multi-session OS (Virtual)	1	1	Ad	min Deskton
ontrollers	Allocation Type: Random		User data: On local disk	Provisioning method:	: Manual		Add Mashing
osting	Linux Desktop		Multi-session OS (Virtual)	1	1		Add Machines
preFront	Allocation Type: Random		User data: On local disk	Provisioning method:	: Manual		Edit Machine Catalog
p-V Publishing	Windows 10 Single Deskt	top	Single-session OS	2	1		View Machines
nes	Allocation Type: Random		User data: -	Provisioning method:	: Manual	. 🖳	Delete Machine Catalog
						1	Rename Machine Catalog
							Upgrade Catalog
							Thep
						1 - 1	
	Details - Admin Desktop						
	Details Machines Ad	dministrators					
	V		Machine			1	
	Machine Catalog						
	Machine Catalog	Admin Dadaten	lestelled V	DA Version: 2112.0.0.22068			
	Machine Catalog Name: Machine Type:	Admin Desktop Multi-session OS	Installed V Operating	DA Version: 2112.0.0.32068 System: Windows 2016			
	Machine Catalog Name: Machine Type: Provisioning Method:	Admin Desktop Multi-session OS Manual	Installed V Operating	DA Version: 2112.0.0.32068 System: Windows 2016	=		

#### The Machine Catalog Setup Wizard displays.

Introduction Machine Catalogs are collections of physical or virtual machines that you assign to users. You create Catalogs from Master Images or physical machines in your environment. Important: The Master Image or physical machine that you use to create a Catalog must have a Virtual Delivery Agent installed. Also, ensure that the operating system is up-to- date and that applications are installed. Before you begin make sure that you:
Machine Catalogs are collections of physical or virtual machines that you assign to users. You create Catalogs from Master Images or physical machines in your environment. Important: The Master Image or physical machine that you use to create a Catalog must have a Virtual Delivery Agent installed. Also, ensure that the operating system is up-to- date and that applications are installed.
Identify the types of desktops and applications your users need     Choose a Catalog infrastructure (for example, whether to power manage virtual machines)     Have a technology for creating and managing machines (such as Machine Creation Services or Citrix Provisioning)     Prepare your environment, including the Master Image, computer accounts, and network interface card configuration. Learn more

3. Click Next on this Wizard.

From the Operating System options that display, select **Server OS**.

Select an operating system for this Machine Catalog. <ul> <li>Multi-session OS</li> </ul>
The multi-session OS machine catalog provides hosted shared desktops for a large-scale deployment of standardized Windows multi-session OS or Linux OS machines.
<ul> <li>Single-session OS The single-session OS machine catalog provides VDI desktops ideal for a variety of different users.</li> </ul>
Remote PC Access The Remote PC Access machine catalog provides users with remote access to their physical office desktops, allowing them to work at any time.
There are currently no power management connections suitable for use with Remote PC Access, but you can create one after completing this wizard. Then edit this machine catalog to specify that connection.

4. In the Machine Management screen that displays, select **Another service or technology** if the machine for which a catalog to be created is not managed by Citrix Provisioning Services or Machine Creation Services (e.g., a virtual machine). Click **Next** afterward.

Studio	Machine Management
Introduction	This Machine Catalog will use: Machines that are power managed (for example, virtual machines or blade PCs) Machines that are not power managed (for example, physical machines)
Machine Management	Deploy machines using:
Machines	Citrix Machine Creation Services (MCS)
Summary	MCS is not available when using physical hardware. Resources: xstok5630334861049856-root-bCAE3UXb8P5s (Zone: Primary) Citrix Provisioning Another service or technology I am not using Citrix technology to manage my machines. I have existing machines already prepared.
	Note: For Linux OS machines, consult the administrator documentation for guidance.

5. In the Machines screen that displays, click Add computers and, in the Select Computers dialog that displays, locate and select the Computer Active Directory account of Citrix Server. Click OK when you are finished. In the present example, CITRIX\CONNECTOR2\$ is added as a machine account. This machine has Monarch installed in it.

Studio	Machines
	Import or add machine accounts:
	Computer AD account
<ul> <li>Introduction</li> <li>Operating System</li> </ul>	CITRIX\CONNECTOR2\$
Machine Management	
Machines	
Summary	
	Remove Import list ) Export list ) Add computers
	Remove       Import list)       Export list)       Add computers         Select the minimum functional level for this catalog:       7.9 (or newer)       •

6. Select Next. The Catalog is now created. Give an appropriate name to this Catalog.

Studio	Summary	
<ul> <li>✓ Introduction</li> <li>✓ Operating System</li> <li>✓ Machine Management</li> <li>✓ Machines</li> <li>Summary</li> </ul>	Machine type: Machine management: Provisioning method: Number of machines added: VDA version: Scopes: Zone:	Multi-session OS Physical Another service or technology 1 7.9 (or newer) - Primary
	Machine Catalog name:	
	Example: Windows 7 SP1 Sales -	2GB
	Machine Catalog description for	administrators: (Optional)
	Example: Windows 7 SP1 desktop	os for the London Sales office
	To complete the deployment, ass	ign this Machine Catalog to a Delivery Group by selecting

Once your catalog has been created, you can select it to view its properties.

Citrix Studio				- 🗆 X
File Action View Help				
◆ ● 2 🗔 🛛 🗔				
Citrix Studio (Local Farm)				Actions
Search				Machine Catalogs
Delivery Groups	Machine Catalog +	Machine type	No. of machines Allocated machines	🛅 Create Machine Catalog
Applications	Admin Desktop	Multi-session OS	1 1	View
Policies	Allocation Type: Random	User data: -	Provisioning method: Manual	Refrech
Logging	Altair Windows 2016	Multi-session OS (Virtual)	1 0	
Configuration	Allocation Type: Random	User data: On local disk	Provisioning method: Manual	Melp
Controllers	Connector1	Multi-session OS (Virtual)	1 1	Connector2
Hosting	Allocation Type: Random	User data. On local disk	Provisioning method: Manual	Add Machines
💑 Licensing	Connector2	Multi-session OS	1 0	Edit Machine Catalog
StoreFront	Linux Decktop	Multiversion OS (Vidual)	Provisioning metriod, manual	View Machines
App-V Publishing	Allocation Type: Random	User data: On local disk	Provisioning method: Manual	Delate Marking Catalan
Unes 🐨	Windows 10 Single Desktop	Single-session OS	2 1	
	Allocation Type: Random	User data: -	Provisioning method: Manual	Kename Machine Catalog
				No Upgrade Catalog
				👔 Help
				1
	Details - Connector2			
	Details Machines Administrators			
	Machine Catalog	Machine		
	Name: Connector?	Installed VDA Version:	Unknown	
	Machine Type: Multi-session OS	Operating System:	Unknown	
	Provisioning Method: Manual			
	Allocation type: Random Set to VDA Version: 7.9 (or newer)			
	Scopes: All			
	Zone: Primary		*	
_				

#### **CREATING A DELIVERY GROUP**

A delivery group is a collection of machines selected from one or more machine catalogs. Delivery groups specify which users can use those machines, and the applications available to those users.

Steps:

1. In Citrix Studio, select **Create Delivery Group** from the **Actions** menu.

Citrix Studio File Action View Help						- 🗆 X
🗢 🄿 🙍 📰 🛛 🖬						
Citrix Studio (Local Farm)						Actions
Search						Delivery Groups
A Delivery Groups	Delivery Group	÷	Delivering	No. of machines	Sessions in use	1 Create Delivery Group
Applications	Admin Desktop		Applications and Desktops	Total: 1	Total: 2 Disconnected: 1	View •
Policies	Connector1		Desktops	Total: 1	Total: 0	Refresh
V 🕏 Configuration	Multi-session OS			Unregistered: 1	Disconnected: 0	👔 Help
Administrators	Linux Desktop Multi-session OS		Desktops	Total: 1 Unregistered: 0	Total: 0 Disconnected: 0	Admin Desktop
Hosting	Windows 10 Single Desktop Single-session OS		Desktops	Total: 1	Total: 1 Disconnected: 1	Add Machines     Add Applications
📮 StoreFront 🔂 App-V Publishing						Edit Delivery Group
Zones						🥩 Manage Tags
						Turn On Maintenance Mode
						Rename Delivery Group
						Delete Delivery Group
						View Machines
						View Applications
						Opgrade Delivery Group
						lest Delivery Group
						Melp
	Details - Admin Desktop					
	Details Applications Desktop	os Machine Catalogs Usa	ge Tags Application Groups	Administrators		
	Delivery Group		State		<u> </u>	
	Name: Description:	Admin Desktop Admin Desktop	Enabled: Maintenance Mode:	Yes Off	=	
	Set to VDA Version:	7.9 (or newer)	Registered Machines:	1		
	Scopes:	All	Registration Missing:	0		
	StoreFronts: Session prelaunch:	- 0ff	Powered off Machines: Total Machines:	: 0 1	-	
	, season presenten.		ious machines.			,

The Create Delivery Group Wizard displays.

Studio	Getting started with Delivery Groups
Introduction Machines Machine allocation Users Applications Desktop Assignment Rules Summary	Delivery Groups are collections of desktops and applications (which could be in Application Groups) that are created from Machine Catalogs. Create Delivery Groups for specific teams, departments, or types of users. Make sure you have enough machines available in single-session OS or multi-session OS Machine Catalogs to create the Delivery Groups you need.
-	Don't show this again

2. In the Machines screen, select the catalog you created and specify the number of machines to add to the delivery group. Note that you can add several machine catalogs to a delivery group but a machine catalog can only be assigned to one delivery group. Click **Next** when you are finished.

		nines		
	Select	t a Machine Catalog.		
		Catalog	Туре	Machines
Introduction	0	Altair Windows 2016	RDS Manual Random	1
Machines	•	Connector 2	RDS Manual Random	1
Machine allocation Users	0	Windows 10 Single Desktop Windows 10 Desktop	VDI Manual Random	1
Applications				
Desktop Assignment Rules				
Summary				
24.5				
247				
2255				
	Choo	se the number of machines for this D	elivery Group: 1	- +
P.,	Choo	se the number of machines for this D	elivery Group: 1	-+
<i>р.</i>	Choo	se the number of machines for this D	elivery Group: 1	-+

3. In the Users screen, specify the users allowed to access to the applications installed in the machines added to your delivery group. You can publish applications to all of the users in your domain if you wish. Click **Next** when you are finished.

	Users	
	Specify who can use the applications and desktops in this Delivery Group. You can assign users and user groups who log on with valid credentials. Alternatively or additionally, you can enable access for unauthenticated users.	
Introduction	Allow any authenticated users to use this Delivery Group.	
Machines	Restrict use of this Delivery Group to the following users:	
Users		
Applications	Add users and groups	
Desktops		
Summary		
	The second s	
	Add Remove	
	Give access to unauthenticated (anonymous) users; no credentials are required to access	
	Give access to unauthenticated (anonymous) users; no credentials are required to access StoreFront	

4. In the Applications screen that displays, select **Add > Existing**.

Studio	Applications
<ul> <li>Introduction</li> <li>Machines</li> <li>Users</li> <li>Applications</li> <li>Desktops</li> <li>Summary</li> </ul>	To add applications, click "Add" and choose a source. Then select applications from that source. If you choose Application Groups, all current and future applications in the selected groups will be added. You can also place new applications in a non-default folder and change application properties.
	Add  Remove Properties Place the new applications in folder: Applications Change Back Next Cancel

The Add Existing Applications dialog launches.

5. Check the boxes for the applications you wish to add (e.g., Monarch Classic 2022, Monarch Data Prep Studio 2022, and Monarch 2022 Utility) and then click **OK** when you are finished.

Studio					
	Select from applications pr	eviously	added to the Site.		t source
4 I	Show all		Name	ŧ	bups will lication
Introduc	C Applications		Citrix Director	<b>^</b>	
Machine			🗱 Citrix Provisioning Boot Device Manager		
Users			🗱 Citrix Provisioning Console		
Applicat			🞇 Citrix Studio	=	
Desktop:			S Citrix XenCenter		DCE
Summan			X Excel		
(20)2001.000			Google Chrome		10.0
			C Microsoft Edge		
			Monarch 2022 Utility		
			Monarch Classic 2022		
			Monarch Data Prep Studio 2022		1000
			Notepad++		
			OneNote	-	
		3 of 2	24 applications selected		
					1

The list of applications should be automatically pre-populated by Citrix studio.

Studio	Applications	
<ul> <li>Introduction</li> <li>Machiner</li> </ul>	To add applications, click "Add" and choose a source. Then select applications from th If you choose Application Groups, all current and future applications in the selected g be added. You can also place new applications in a non-default folder and change ap properties.	iat source. roups will plication
/ llcorr	Name	+
A U 4'	🎶 Monarch 2022 Utility	
Applications	M Monarch Classic 2022	
Desktops	Monarch Data Prep Studio 2022	
	Add  Properties  Place the new applications in folder:  Additions	
	Applications	
	Channel	

- 6. Click **Next** on the Desktops screen.
- 7. In the Summary screen, provide a name for the newly defined delivery group. You may also add a description of this group if you wish. Select **Finish** when you are done.

Studio	Summary	
<ul> <li>Introduction</li> <li>Machines</li> <li>Users</li> <li>Applications</li> <li>Desktops</li> <li>Summary</li> </ul>	Machine Catalog: Machine type: Allocation type: Machines added: Users: Applications to add: Launch in user's home zone:	Connector 2 Multi-session OS Random CITRIX/CONNECTOR2 1 unassigned Allow authenticated users Monarch 2022 Utility, Monarch Classic 2022, Monarch Data Prep Studio 2022 No
	Delivery Group name: Example: Finance Win OS Delivery Group description, used	d as label in Citrix Workspace app (optional):

Your newly added delivery group is created; this group will display in the Delivery Groups list.

😫 Citrix Studio					- 🗆 X
File Action View Help					
🗢 🏟 🙍 📰 🔽 📷					
Citrix Studio (Local Farm)				4	Actions
Search					Delivery Groups
Machine Catalogs     A Delivery Groups	Delivery Group 4	Delivering	No. of machines Sessi	ions in use	Create Delivery Group
Applications	Admin Desktop	Applications and Desktops	Total: 1	Total: 2	View 🕨
Policies	Multi-session OS	Desistence	Unregistered: 0 Di	sconnected: 1	Q Refresh
✓ Configuration	Multi session OS	Desktops	Unregistered: 1 Di:	iotal: 0	7 Help
Administrators	Connector2	Applications	Total: 1	Total: 0	Connector?
Hosting	Multi-session US		Unregistered: I Di:	sconnected: 0	Add Machines
🔏 Licensing	Multi-session OS	Desktops	Unregistered: 0 Dis	sconnected: 0	Add Applications
StoreFront	Windows 10 Single Desktop	Desktops	Total: 1	Total: 1	Edit Delivery Group
Zones	Single-session US		M Unregistere Di	sconnected: 1	Manage Tags
				5	Turn On Maintenance Mode
				ε	Rename Delivery Group
				li li	Delete Delivery Group
					💆 View Machines
					View Applications
					🖏 Upgrade Delivery Group
					Test Delivery Group
				1	? Help
	Details - Connector2				
	Details Applications Desktops Machine Catalogs U	sage Tags Application Groups	dministrators		
	Name		Source		
	🌵 Monarch 2022 Utility		Master Image	e	
	Monarch Classic 2022		Master Image	e	
	The monarch bata riep studio 2022		Master imagi	c	
4					

The Applications list will show a set of published applications, including Monarch.

#### Launching the Monarch Application

When your machine catalog and delivery group have been correctly configured, you can launch the Monarch application by:

Selecting the Citrix Workspace item from your desktop and logging in

🎯 Citrix Wo	orkspace				×
User	name:				
Passv	word:				
		Sign In	Cancel		
🔒 S	ecure conr	ection			

Citrix Gateway × +		∨ – □ X
← → C  a 162-133-68-244.mycitrixdemo.net/vpn/index.html		🖻 🖈 🖪 🖪 👂 🖈 🖬 📵 🗄
	Please log on	
	User name User1	
Citrix Gateway	Password	
	Log On	

□ Specifying the web URL of Citrix Receiver and logging in as usual

The applications available to you, including Monarch, display on the Applications screen.

In Citrix Workspace: Citrix Workspace  $\times$ Workspace user1 🗸 📿 3) ٩V 0 + Monarch 2022 Utility Monarch Data Prep Studio 2022 Monarch Classic 2022 Google Chrome Outlook Notepad+-Word

#### In Citrix Receiver:

→ C 🔒 162-13	× + 33-68-244.mycitrixdemo.ne	t/Citrix/StoreWeb/				🖻 🏚 🗹	) A Ø * 🗆 🕻
× StoreFront			СС ПО				Q
elcome user1!							
vorites							
3	*	*	*	*	*	* w	
Monarch 2022 Utility	Monarch Classic 2022	Monarch Data Prep Studio 2022	Notepad++	Google Chrome	Outlook	Word	

# **ACTIVATING MONARCH**

After installation, you can use Monarch by either opting to run a trial version of the software, which is valid for 30 days, or activating it. Without activation, you will be unable to use Monarch beyond the allowed trial period.

Once you have activated Monarch, you can only use it on the machine on which you have activated it. You will need to deactivate Monarch if you wish to use it on another machine.

### THE ALTAIR MONARCH LICENSE MANAGER

The main interface used to activate Monarch is the Altair Monarch License Manager (License Manager). The License Manager launches the first time you run Monarch, during which you are asked how you would like to activate your install, or when you opt to deactivate your Monarch install.

S Altair Monarch License Manager	—		$\times$
Altair Monarch 2023: Choose License Method	<u>Info</u>	About	<u>Help</u>
Before you can use Altair Monarch 2023 you need to specify a license type. Please choose f following options:	rom tl	he	
🔿 Start Trial			
O Connect to a Monarch License Server			
Connect to an Altair License Management System			
	V	4W	YW
My Nogamen many my			
Cancel < I	Back	Nex	t >

You can switch from one type of licensing to another at any time you wish by using the Monarch License Manager. You could, for example, switch from your trial license (without completing the trial period) to using Altair Units or a volume license key file. To do so, simply launch the Monarch License Manager and select any of the other licensing options available to you.

### **ACTIVATION METHODS**

You can activate Monarch by connecting to an Altair License Management System or Altair Monarch License Server, using a Volume License Key File, or specifying an Activation Code.

Activation through an Altair License Management System allows you to use Managed Licensing (Altair Units), an Altair Activation Key or License File, or local licensing (on-prem license server or standalone license file) to activate your copy of Monarch.

- □ Activation through a **Monarch License Server** may be performed if you have access to a license file located on an Altair Monarch License Server. In this case, credentials to access this server must be provided.
- Activation through a Volume License Key File is done when your license file is located in some local folder or network. In this case, the path to this file must be provided. Note that this option is a legacy licensing method and <u>must be enabled</u> before it can be used.
- Activation through an Activation Code can be done if you have access to a Nalpeiron activation code. Note, however, that this activation method is not generally recommended as future releases of the software may render this option deprecated. Note that this option is a legacy licensing method and <u>must be enabled</u> before it can be used.

Each of these activation methods will be discussed in this guide.

### **ACTIVATING MONARCH THROUGH A FIREWALL**

In some cases, a firewall rule must be created to allow activation of Monarch using the License Manager with an internet connection (e.g., the firewall of your machine is activated). The Activation Server for Monarch versions 2020+ is located at **184.106.60.185 (hostname: my.nalpeiron.com)**.

### **USING MONARCH IN TRIAL MODE**

The first time you install Monarch, you may use a trial version of the software free for 30 days. Afterward, you must activate Monarch through any of the ways described in this guide if you wish to continue using it. To use a Trial version of Monarch in the present example, select the **Start Trial** button in the *Choose License Method* screen of the License Manager. The following screen displays:

🔍 Altair Monarch Lic	ense Manager	-		×
Altair Monarcl	1 2023: User Information Settings	<u>Info</u>	<u>About</u>	<u>Help</u>
First Name				
Last Name				
Company				
Job Title		27.75		
Business Phone		1011.		
Business Email			5 64	W
Country				-
M.				
11. Nave	March March March			
	Cancel < I	Back	Fini	sh

Supply the information required and then click Finish.

When using Monarch Classic in trial mode, a popup displays to remind you of how many days remain in your trial.,

🕅 Altair Monarch Classic – Trial Mode	×
Trial Mode. Hours left: 23	
Activate or Buy Continue Trial	

Select **Continue Trial** to proceed with your trial. If you wish to activate or buy a new copy of Monarch, select the **Activate or Buy** button. Doing so will take you back to the *Choose License Method* screen.

In Monarch Data Prep Studio, the number of days/hours remaining in your trial displays in the middle of the screen and persists in upper right-hand corner of the application window.

#### Trial License Expires: 05.31.2023

Once your trial period has expired, you must activate Monarch using any of the options described in <u>Activation</u> <u>Methods</u>. Note that you can activate Monarch even if your trial period has not expired.

### ACTIVATION VIA AN ALTAIR LICENSE MANAGEMENT SYSTEM

The Altair License Management System provides you with several options through which you can activate your copy of Monarch. Using a single interface, you can activate Monarch via Managed Licensing (i.e., Altair Units), an Activation Key (online activation) or License File (offline activation), or Local Licensing (i.e., on-premise license server or standalone license file).

To access these options, launch the Altair Monarch License Manager, select the **Connect to an Altair License Management System** option in the Choose License Method screen, and then click **Next**. The Altair License Server Connection screen displays.

🔍 Altair Monarch License Manager		_		×
Altair Monarch 2023: Altair Units License Configuration	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
Managed Licensing Activation Local Licensing				
Altair Units: Authentication failed Configure The existing authorization token has been rejected or revoked by the Altair Units server				
ALTAIR_LICENSE_PATH:		W.		M
Advanced Borrowing Duration (in hours): 24 💭 Optimization: 3	Auto	W.		
Advanced Licensing Tools Ping Tools	t Connec	tion	Hostl	Ds
Cance	<	Back	Conr	nect

#### **Managed Licensing**

Altair Units is a cloud-based license management system that enables greater flexibility with your Altair licenses. Integrated with Altair One, Altair Units allow you to seamlessly access your Altair licenses with just an internet connection.

Steps:

- 1. Launch Google Chrome and then go to the Altair One Admin Portal at <u>https://admin.altairone.com/</u>. Log in with your credentials.
- 2. Once logged in to the portal, navigate to User Profile > Authorized Machines.

🛆 Altair   Altair One Admin Portal	× +				o ×
← → C # admin.altairo	ne.com/updateprofile				x 1 1
Altair One					Feedback 🧕
Dashboard      Re Users      Ucense Settings	Setter Authorized N	Machines			Generate Auth Code
오 User Profile	Username	Hostname	Auth Token	Added At	MAC Addresses
	admin	DESKTOP-AJVCLRH	a31ef357	2021-03-01 08:26:20 A	D4:25:8B:05:1D:05,00
	admin	DESKTOP-PRMNUBG	28fc2443	2021-06-11 06:37:50 A	00:0C:29:A8:90:1C, B0:
			First 1	• Last	

#### 3. Click Generate Auth Code.

🛆 Altair   Altair One Admin Portal 🗙	4				• - • ×
← → C 🔒 admin.altairone	e.com/updateprofile				☆ 👗 i
iii Altair One					Feedback <u>Q</u>
Dashboard	Settings Authorized Ma	achines			
<ul> <li>License Settings</li> </ul>	Authorized Machin	nes (2)			Generate Auth Code
义 User Profile	Username	Hostname	Auth Token	Added At	MAC Addresses
	admin	DESKTOP-AJVCLRH	a31ef357	2021-03-01 08:26:20 A	D4:25:8B:05:1D:05,00
	admin	DESKTOP-PRMNUBG	28fc2443	2021-06-11 06:37:50 A	00:0C:29:A8:90:1C, B0:
			First 🔒 1	• Last	

The page refreshes to display the authorization code and a countdown of time left for authorization.

🛆 Altair   Altair One Admin Portal 🔉	< +				0	- 0	×
← → C 🔒 admin.altairon	e.com/updateprofile					\$	) E
iii Altair One						Feedbac	k Q
Dashboard	Settings Authorized	Machines					
License Settings							
2, User Profile	Auth Codes can be	used with Almutil by administrate Yi E ines (2)	ors to quickly author multiple mach our Auth Code is: TD xpires in 14 minutes	ize license access by multiple nines. IPACOOD () , 56 seconds	users on a single mac	hine and/or	<b>3 x</b>
	Username	Hostname	Auth Token	Added At	MAC Addresses		
	admin	DESKTOP-AJVCLRH	a31ef357	2021-03-01 08:26:20 A	D4:25:88:05:1D:05,	00	
	admin	DESKTOP-PRMNUBG	28fc2443	2021-06-11 06:37:50 A	00:0C:29:A8:90:1C, E	30:	
			First 1	• Last			

- 4. In the Altair Monarch License Manager, ensure that the **Managed Licensing** tab is selected in the Altair Units License Configuration screen and then click the **Configure** button.
- 5. Enter the Authorization Code you received in Step 3 into the field provided and then click Authorize.

S Altair Units Configuration	-		×
Configuration scope: User			
Authorization Token:  Authorize  Authorize  Authorize  Proxy is not set (across all s  Proxy required  Host:  Port:  O  Username:  Decouverde  Decouverde	scopes)		
1) Go to https://admin.altairone.com         2) Sign In         3) Go to User Profile >Authorized Machines         4) Generate an authorization token         5) Input the code in the text box above and press Authorize	le	Revert	
Information ALM_HHWU_CONFIG  ALM_HHWU_USE_WININET		Class	
		Close	•

If your machine is properly authorized, the following message displays.

Altair Units Configuration				_		
	Configuration scope	User	• 0			
Authorization		Proxy —				-
Authori	zation Token:	1	Proxy is not set (acro	oss all scope	es)	
9GIK630B	Authorize	Proxy	/ required			
ſ	S Information	TIOSE.	×	-		
	Authorization was su	ccessful!		Saus	Davar	
1) Go to https://admin.altain 2) Sign In 3) Go to User Profile >Authori 4) Generate an authorization t 5) Input the code in the text b	zed Machines oken ox above and press Authorize		OK	Save	Keven	
Information ALM_HHWU_CONFIG 2						
					Clos	e

- 6. Click **OK** and then close the screen when you are finished.
- 7. If you wish to enable license checkout (i.e., allow users to "check out" or "borrow" their license so that they can work with the Monarch applications offline), enter a maximum number of hours users can check out their license into the **Advanced** > **Borrowing Duration** field.
- 8. Choose an **Optimization** type (ideally **ML** or **Auto**) from the options available.

The Optimization setting reduces the time required by the licensing process to validate your license by instructing the application which target licensing platform to use as a licensing source. This setting is ignored if the "ALM\_HHWU" environment variable is defined on your machine.

9. Click **Connect** in the Altair License Server Connection screen.

Monarch is successfully activated.

💊 Altair Monarch License Manager	_		$\times$
Altair Monarch 2023: License Information Settings	<u>Info</u>	<u>About</u>	<u>Help</u>
Product successfully licensed. Licensing Method: Altair License Management System	onfigu	re Licen	se
		Finis	h

#### **Activation Key**

An Altair Activation Key is similar to the traditional Monarch activation code and is used to activate the software on a machine with access to an Altair License Activation System (ALAS). This key will be provided to you if your copy of Monarch was properly purchased.

#### Steps:

- 1. In Altair Monarch License Manager, select the **Connect to an Altair License Management System** option in the **Choose License Method** screen and then click **Next**.
- Select the Activation tab in the Altair Units License Configuration screen, and then enter the activation key
  provided to you in the field provided for it.

ltair Monarch	h 2023: A	ltair Uni	ts Licen	se Con	figuration			Settings	Info	About	Help
Managed Licens	sing Activ	vation Lo	ocal Licen	sing							
Activation Key:	1										_
License Store:	User			• 0							-
	C:\Users\adm	iin\AppData\	Localaltair	licensing\(	DESKTOP-PRM	NUBG\license	<u>s????G???</u>				
Import License	File	Status	0					Deactiv	ate	Activa	te
Information _									VA	A	YA.
ALTAIR_LICENSI	E_PATH:										Ň
Advanced											M
Auvanceu —				,				_	-	1	
Borrowing Dur	ation (in h	iours):	24 🌩	l .		Optimiza	ation: (	Auto			-
Advanced Lice	nsing Tool	s 💡 Pi	ng የ	m	k		Те	st Connec	tion	Host	Ds
							Cano	a <	Back	Conr	nect

- 3. Select the appropriate license store from the options provided. The license store type defines the scope and storage folder for activated licenses.
  - Selecting User saves the license to the "C:\Users\[User]\AppData\Local\.altair\_licensing\[ComputerName]\licenses" folder.
  - Selecting System saves the license to the "C:\ProgramData\altair\licenses" folder.
- 4. Click the **Status** button if you wish to view a list of all ALAS activated licenses currently stored in all licenses stores on your machine, along with their status.
- 5. If you wish to enable license checkout (i.e., allow users to "check out" or "borrow" their license so that they can work with the Monarch applications offline), enter a maximum number of hours users can check out their license into the **Advanced** > **Borrowing Duration** field.
- 6. Choose an **Optimization** type (ideally **LMX** or **Auto**) from the options available.
- 7. Click Activate.

If your Altair activation key is valid, the following message displays.

S Information	×
License was activated and stored in the license store.	ne User
	ОК

8. Click **Connect** in the Altair Units License Configuration screen.

Monarch is successfully activated.



#### **License File**

You can activate Monarch using an Altair license file if the machine in which the software was installed does not have access to an ALAS. In this case, the license file must have been generated using the HostID file created for the machine without internet access (hereafter referred to as **Machine A**) by a machine with access to this activation system (hereafter referred to as **Machine B**). Note that this method requires you to have a valid Altair Activation Key. Once created, this license file can be used by **Machine A** to activate Monarch.

The steps described here assume that a valid license file for **Machine A** had previously been created by **Machine B** and should be performed by **Machine A**. A more detailed discussion on this procedure is provided <u>here</u>.

Steps:

- 1. Select the Activation tab in the Altair Units License Configuration screen and then click the Import License File button.
- 2. Use the dialog that displays to navigate to the folder containing your license file and select it.

🔍 Import License File	-		Х
License File to Import		Brows	e
License Store: ()	User 🔹		
	CUSers\admin\AppData\Local\altair_licensing\DESKTOP-PRMNUBG\licenses~?fA?\??\C:\Users\admin\	AppData\l	<u>ocal</u>
Import		Close	

- 3. Select the appropriate license store from the options provided. The license store type defines the scope and storage folder for activated licenses.
  - Selecting User saves the license to the "C:\Users\[User]\AppData\Local\.altair\_licensing\[ComputerName]\licenses" folder.

- Selecting System saves the license to the "C:\ProgramData\altair\licenses" folder.
- 4. Click the **Status** button if you wish to view a list of all ALAS activated licenses currently stored in all licenses stores on your machine, along with their status.
- 5. If you wish to enable license checkout (i.e., allow users to "check out" or "borrow" their license so that they can work with the Monarch applications offline), enter a maximum number of hours users can check out their license into **the Advanced** > **Borrowing Duration** field.
- 6. Choose an **Optimization** type (ideally **LMX** or **Auto**) from the options available.
- 7. Click the **Import** button and, when the dialog closes, click the **Connect** button.

Monarch is successfully activated.

#### **Local Licensing**

If you opt to use Local Licensing, you can activate Monarch via an on-prem license server or standalone license file (including a student license).

Steps:

1. Select the Local Licensing tab in the Altair Units License Configuration screen.

🔍 Altair Monarch License Manager		-		$\times$
Altair Monarch 2023: Altair Units License Configuration	Setting	<u>is Info</u>	<u>About</u>	<u>Help</u>
Managed Licensing Activation Local Licensing				
On-premise License Server:				
Standalone License File:			Brow	se
_ Information		H	M	-
ALTAIR_LICENSE_PATH:		H	KAV	VA
Advanced			W.W	
Borrowing Duration (in hours): 24 💌 Optim	ization: 😯 Auto	)	1   •	•
Advanced Licensing Tools Ping	Test Conn	ection	Host	IDs
	Cancel	< Back	Con	nect

- 2. At this point, you can activate your Monarch install in one of two ways:
  - Enter the path to a valid On-premise License Server (with the default port 6200) into the field provided.
  - Enter the path to a valid **Standalone License File** into the field provided.
- 3. If you wish to enable license checkout (i.e., allow users to "check out" or "borrow" their license so that they can work with the Monarch applications offline), enter a maximum number of hours users can check out their license into the Advanced > Borrowing Duration field.
- 4. Choose an **Optimization** type (ideally LMX or Auto) from the options available.

5. Click **Connect** when you are done.

Monarch is successfully activated.

#### **STUDENT LICENSES**

Monarch offers a "student edition" of the application, which is activated using a standalone license following manual approval. This license is provided for educational purposes to students who wish to explore the technology or need the application to work on homework assignments.

The student edition of Monarch has the following limitations:

- Activation is supported via the Altair License Management System licensing method only.
- □ Monarch Automation is not available.
- Only 10 rows can be exported in Monarch Classic and Data Prep Studio.

#### **Advanced Licensing Methods**

The Altair License Management system provides an alternative utility that you can use to activate Monarch. This utility is installed along with your Monarch installation, typically in C:\Program Files\Altair Monarch 2023\security, and provides comprehensive Altair licensing functionality, including the ability to obtain HostIDs, manage license borrowing and returns, and perform online and offline activation, among others. You can access this utility by clicking **Advanced Licensing Tools** in the Altair Units License Configuration screen of the Altair Monarch License Manager and then launching the **almutil\_gui** application in the folder that displays.

Edit	Tools	Help							
ostID	License	Usage	Managed Licensing	Activation	Borrowing	Remote Admin			
			HostID			Туре	Descriptio	Сору	
00C29B	CC988					ETHERNET	Intel(R) 8257	Refresh	
4258B0	51D05					ETHERNET	Bluetooth De	Export To File	
Mware <sup>.</sup>	-564d94cd	176b01df	3-daf8cc8362bcc988			BIOS	Phoenix Tecl	Dongle Support	
266620									
200020	087530128	09422775	5174176268814247662	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200020	087530128	09422775	5174176268814247662	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200020	J87530128	09422775	5174176268814247662	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200020	387530128	09422775	5174176268814247662	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200020	387530128	09422775	517417626881424766	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200020	387530128	09422775	5174176268814247662	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200021	387530128	09422775	5174176268814247662	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200021	387530128	09422775	517417626881424766;	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200021	387530128	09422775	517417626881424766;	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
200024	187530128	09422775	517417626881424766;	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
	187530128	09422775	517417626881424766;	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		
	187530128	09422775	517417626881424766;	2338342377676	924661525	WIN_INSTALL_ID	Windows Ins		

Each of the licensing methods described above can be performed using this utility.

#### MANAGED LICENSING

To activate Monarch via Managed Licensing, click the **Managed Licensing** tab of this utility and then provide the necessary details.

lastTD Lisense Llasse	Managed Licensing	Activation Per	auina Domoto Admin	
Authorization	Manageo Licensing	Activation Dorn	Proxy Configuration Proxy Required Use legacy proxy credentials ①	
Authoriz E-mail Address Password	e with Altain	r One () Sign In	Proxy Host Proxy Port Proxy Username Proxy Password	
			Save Reve	rt

#### **ACTIVATION KEY**

To activate Monarch using an Altair Activation Key, click the **Activation** tab and provide the Activation Key. Select a License Store location and then click **Activate**.

81	Altair Li	cense U	tility							-		×
File	Edit	Tools	Help									
Н	ostID	License	e Usage	Managed Licensing	Activation	Borrowing	Remote Admin					
			-									
		Activat	ion Key		YYYYY-YYYY	r-YYYYY-YYYYY						
		License	Store		User	·						
					C:\Users\adn	nin \AppData \Lo	cal\.altair licensin	IQ DESKTOP-PRM	INUBG Vicense	25	_	
									A	ctivate		

#### LICENSE FILE

As explained <u>here</u>, you can activate Monarch using an Altair license file if the machine in which the software was installed does not have access to an ALAS. Note that this method requires you to have a valid Altair Activation Key. The license file in this case will be generated using the HostID file created for the machine without internet access (hereafter referred to as **Machine A**) by a machine with access to this activation system (hereafter referred to as **Machine B**). Once created, this license file can be used by **Machine A** to activate Monarch. The steps below explain how this procedure is done using the Altair License Utility.

#### Steps:

1. Generate a HostID file for **Machine A**. A HostID is a unique machine value that can be used to lock a license file to a specific host.

In **Machine A**, select the HostID tab of the Altair License Utility and then click the **Export to File** button. Your HostID details are saved to an XML file at a location of your choosing. This location must be accessible to **Machine B**.

	lools Help							
HostID	License Usage	Managed Licensing	Activation	Borrowing	Remote Admin			
		HostID			Туре	Descriptio	Сору	
00C29B	CC988			E	THERNET	Intel(R) 8257-	Refresh	
04258B0	51D05			E	THERNET	Bluetooth De	Export To File	
/Mware	-564d94cd76b01d	f3-daf8cc8362bcc988		В	IOS	Phoenix Tecł	Dongle Support	
3266620	1875301280942277	517/17626991/2/7662	338342377676	024661525 V	VIN INSTALL ID	Windows Ins		
		5174170200014247002	.550542511010	JE40015E5 1		Windows ins		
		5174170200014247002		1001323		Windows ins		
		5174170200014247002	3363-2377070	•		Windows ins		
		5174110200014247002	336342311010	•				
		3174170200014247002		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				
		3174170200014247002						
		114110200014241002						
		114110200014241002						
		11411020014241002						
		11411020014241002						
		11411020014241002						

2. Generate a license file for Machine A.

In **Machine B**, launch the Altair License Utility and then select **Tools** > **Offline Activation Wizard**. The wizard displays, and your connection to the License Activation Service will be checked.



- 3. Click **Next** and then follow the prompts that display. When asked to supply the HostID file, use the file generated in Step 1.
- 4. Click **Activate** when you are finished to activate Monarch. In the final screen of this wizard, you will be asked to select a location in which to save your license file. Select a location that is accessible to **Machine A**.
- 5. In Machine A, select Tools > Import License File in the Altair License Utility toolbar.
- 6. Navigate to the location of the license file generate in Step 4 and select a store location. Click **Import** when you are finished.

🕄 Suco	cess X
	C:/1/comp1_offlineLic was succesfully imported in to the User license store
	ОК

- 7. Using Machine A, launch the Monarch License Manager, select the Connect to an Altair License Management System option in the Choose License Method screen, and then click Next.
- 8. In the Altair Units License Configuration page, select the **Activation** tab and then click **Test Connection**. This step checks whether the license imported in Step 6 was indeed imported correctly.
- 9. If the result is positive, a popup displays.

S Information	×
Success!	
Feature: MonarchClassic Version: 23.0 Expires: 4/24/2023 12:00 AM	
Source: C:\Users\WinX64Local\AppData\Loc \.altair_licensing\	cal
- MALLAN CON	OK
-NER LAPROVININ .	OK

10. Close this dialog and then click **Connect** in the Altair License Server Connection screen.

Monarch is successfully activated.

💊 Altair Monarch License Manager	_		$\times$
Altair Monarch 2023: License Information Settin	g <u>s Info</u>	<u>About</u>	<u>Help</u>
Product successfully licensed. Licensing Method: Altair License Management System			
Martin many	Configu	ure Licen	se
		Finis	h

### ACTIVATION USING A MONARCH LICENSE SERVER

Monarch 2023 can be activated via the Monarch License Server. You can also implement a license server "mirror" to use as a failover server in case your target license server fails.

#### Activating Monarch via the Monarch License Server

Steps:

- 1. From the *Choose License Method* screen of the License Manager, ensure that the **Connect to a Monarch** License Server button is selected and then click Next. The *License Server Connection* screen displays.
- 2. Enter the name of the License Server you wish to connect to into the corresponding field. Ensure that your port is correctly specified.

R Altair Monarch Lice	ense Manager		-		$\times$
Altair Monarch	2023: License Server Connection	<u>Setting</u>	<u>s Info</u>	<u>About</u>	<u>Help</u>
Server Name:		-	Port:	5151	5 🔹
Instance Name:					
License Server	Connection Security Information			Mw	h.
Scheme: http					
Failover Servers	s 😧		- MA		
			11 11		4M
Add				1	$\vdash$
MAR	And many many				
	С	ancel	Back	Conr	nect

If you are unfamiliar with the name of the server to which you should connect, select the **dropdown** button located to the right of the *Server Name* field and then click **Browse for all** to launch a dialog that lists all available servers in your network.

🔍 Altair Monarch License Manager			_		$\times$
Altair Monarch 2023: Licens	e Server Connection	<u>Setting</u>	<u>js Info</u>	<u>About</u>	<u>Help</u>
Server Name: Instance Name: License Server Connection Sec Scheme: http Failover Servers ?	Search win-hi2hek58iaq		Port:	5151	
Add	Cancel OK			/	F V
		Cancel	< Back	Conr	nect

Select the server name you wish to connect to and then click  $\ensuremath{\text{OK}}$  .

- 3. Enter a valid instance name into the **Instance Name** field.
- 4. Click **Connect** when you are done.

Upon successful connection, the following screen displays.

💫 Altair Monarch License Manager	—		$\times$
Altair Monarch 2023: License Information Settings	<u>Info</u>	About	<u>Help</u>
Product successfully licensed. Licensing Method: License Server	nfigu	re Licen	se
		Finis	h

5. Select **Finish** when you are done.

You can choose to change the license method for your Monarch install by selecting the **Configure License** button. Doing so returns you to the *Choose License Method* screen.

You may now run and use Monarch.

#### **Implementing License Server Mirroring**

You can specify a "failover" license server that will automatically be activated and provide licensing authentication should the main server fail, for example, due to a power outage or hardware malfunction. This functionality requires two License Servers that share the same database. Your system administrator may help you set up these license servers if necessary.

#### Notes:

- You can specify up to two failback license servers at a time.
- Both servers must be running at the same time.
- Switching between the main and fallback license servers occurs only if the main license server is unreachable. If the main server is reachable but some issue, for example, a communication issue is found, an server connection error message is returned.

#### Steps:

- 1. After completing Steps 1 and 2 above, go to the Failover Servers section of the wizard and then click Add.
- 2. In the Failover License Server Configuration dialog that displays, provide the information of the license server you intend to use as a failover server.

Sealover License Se	rver configuration X
Server Name:	▼ Port: 51515 🔦
Instance Name:	Monarch 2022
License Server	Connection Security Information
Scheme: htt	
	Test connection OK Cancel

Similar to Step 2 above, you must provide:

Name of the license server you wish to use as a failover server

You can enter the server name manually or browse for it by clicking on the drop-down button located to the right of the field. Clicking **Browse for all** will open a Search window that will show all available servers in your network. The instance name of the failback server is automatically defined as the instance name specified for the main server.

- Port number of the License Server service. Here, Port 51515 is defined as the default License Server port but this value can be altered to a custom port.
- 3. Test the connection if you wish by clicking the **Test Connection** button.
- 4. Click OK on the Failover License Server Configuration dialog to save the details of your failback server.

At this point, you can:

Click on the **Test Connection** button to check the connection to the failback server selected.

- Click on the Edit button to modify the details of the failback server selected.
- Click on the Delete button to delete the details of the selected failback server.
- 5. Click the **Connect** button.

You will be connected to the License Server and the required license will be granted.

#### **Using Monarch With Monarch License Server**

When you use Monarch activated with a license server, the following dialog box displays.

	License Server ×
M License Server - win-hi2hek58iaq - Monarch 2022 X	User Name
User Name:	Password:
Password:	Use Windows Authentication
<ul> <li>Windows Authentication</li> <li>Save user credentials</li> </ul>	Save user credentials
OK Cancel Change Password	OK CANCEL CHANGE PASSWORD

To continue using Monarch, you will need to specify the username and password of a valid user.

### ACTIVATION USING A VOLUME LICENSE KEY FILE

Monarch 2023 can be activated via a volume license key file.

#### Steps:

1. From the *Choose License Method* screen of the License Manager, ensure that the **Use a Volume License Key File** button is selected and then click **Next**. The *Volume License Key File* screen displays.

🔍 Altair Monarch License Manager		- 0	×
Altair Monarch 2023: Volume License Key File	<u>Settings</u>	Info Abou	t <u>Help</u>
Volume License Key File:		Bro	owse
Martin many	Cancol	Pack N	

- 2. In the License File window, manually enter the path to the license key file or click **Browse** to launch your file directory and select the license file.
- 3. Click Next. Upon successful connection, the following screen displays.

🔍 Altair Monarch License Manager	-		$\times$
Altair Monarch 2023: License Information Settings	<u>Info</u>	About	<u>Heip</u>
Product successfully licensed. Licensing Method: Volume License Key File	nfigu	re Licen	se
		Finis	h

4. Select Finish when you are done.

You can choose to change the license method for your Monarch install by selecting the **Configure License** button. Doing so returns you to the *Choose License Method* screen.

You may now run and use Monarch.

# ACTIVATING MONARCH USING AN ACTIVATION CODE

The Activation Code is also referred to as a License Code, License Key, or License Number. It is an 18-digit code that you must specify in the **Activate License** screen of License Manager to activate Monarch. This key should have been provided to you if your copy of Monarch was properly purchased.

### IMPORTANT: Activation codes for Monarch 2023 require an internet connection for periodic license verification.

- □ For Monarch installations activated by online activation, the license check is performed every 14 days.
- For Monarch installations activated by offline activation, the license check is performed every 30 days.
- For Monarch installations on a virtual machine, the license check is performed every 24 hours.

When a license lease (i.e., the time between two verification instances) is about to expire and no internet connection is detected, the following message displays:

License Lease Ex	piry Warning - 21 Hours Remaining	23
The product has be you are connected	en unable to verify the license recently. Please ens to the internet to avoid the license becoming inval	ure that id.
Do you wish to try	and verify the license now?	
	Yes No	

If you wish to verify your license, ensure that you are connected to the internet prior to clicking "Yes" on the dialog.

If your license expires and no internet connection is detected, the following message displays:

icense Verification Error	23
PRODUCT LICENSE VERIFICATION ERROR	
The license verification for this product expired on: 12/11/2022 2:02 Pl Please ensure that you are connected to the internet in order to verify license.	M. the

To continue using Monarch, simply connect to the internet to verify your license.

If an internet connection is not available, contact Altair Support via the support portal, chat, or phone.

#### **Activating Monarch Online**

Steps:

1. Launch the Altair Monarch License Manager.

The License Manager displays.

🔍 Altair Monarch License Manager		-		×
Altair Monarch 2023: Choose License Method	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
		-		
Before you can use Altair Monarch 2023 you need to specify a license type. Please following options:	e choose f	rom t	he	
◯ Start Trial				
Activate Altair Monarch 2023 using an Activation Code				
O Connect to a Monarch License Server				
O Connect to an Altair License Management System				
O Use a Volume License Key File				
				$\forall$
My Nasaman many many				
Canc	el <	Back	Nex	t >

2. From the *License Method* screen, ensure that the Activate Altair Monarch 2023 using an Activation Code button is selected and then click Next. The *Activate License* screen displays.

S Altair Monarch License Manager		-		×
Altair Monarch 2023: Activate License	<u>ettings</u>	<u>Info</u>	About	Help
Enter your Activation Code, make sure you are connected to the internet and press	Activate	e.		
Activation Code:				2
		N	m	
If you are not connected to the internet, press the Offline Activation button below.				
Mr. North Martin Martin				
Settings Offline Activation Cancel	<	Back	Activ	ate

3. Manually enter the activation code provided to you and then click Activate.

💊 Altair Monarch License Manager		_		$\times$
Altair Monarch 2023: License Information	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
				m
				Ň
Product successfully activated.				1/hu
· · · · · · · · · · · · · · · · · · ·				Υ Ϋ́
				Wh
				+
Nu Nu I				
the Alepan - and mult	Co	nfigui	re Licens	se
			Finis	h

Upon successful connection, the following screen displays.

4. Select Finish when you are done.

You can choose to change the license method for your Monarch install by selecting the **Configure License** button. Doing so returns you to the *Choose License Method* screen.

You may now run and use Monarch.

#### **Activating Monarch Offline**

In cases where reliable internet is unavailable, you may activate Monarch offline. Using this method, you will need to enter information to and from the Activation dialog boxes and Trusted Activation Center on the web. You will also need the assistance of your systems administrator or Altair Support.

Steps:

- 1. Launch the License Manager and then select Activate Altair Monarch 2023 using an Activation Code. Click Next when you are finished.
- 2. In the Activate License screen that displays, enter your activation code into the field provided and then select the **Offline Activation** button to display the *Offline Activation* screen. The following note displays.



3. Click OK to proceed with offline activation.

💊 Altair Monarch License Manager		-		$\times$
Altair Monarch 2023: Offline Activation	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
1) Please enter License Activation Code:				
2) Open the activation link in a web browser or copy link to the clipb	oard: 📴			
3) Press the 'Generate' button to generate an Activation Certificate.	Generate			
4) Copy "Activation Certificate" and paste into the "Activation Certific	cate" field on the web	) page	•	$\pm$
<ol> <li>Press "Activate" on the web page to generate the Activation Certif</li> </ol>	ïcate.	I.M	PA.	ũ.
<ol> <li>Copy and paste the Certificate from "License" field on the web page</li> </ol>	ge.			$\frac{1}{2}$
			1	
			1	
invalid Certificate will cause the regeneration of the 'Activation Ce	rtificate' (point 2). If t	his oc	an curs, the	е
offline activation process must be restarted.				٣
	Cancel <	Back	Activ	ate

- 4. With your systems administrator or Altair Support, follow the instructions provided in this screen to manually update your Monarch installation.
  - 4.1 Click the activation link in Step 2 of the screen to launch the Activation window on your browser.

#### 4.2 Click Generate.

An Activation Certificate displays in the field below Step 4 in the Offline Activation screen.

**Note:** Offline activation certificates expire in 7 days, so please ensure that the offline activation process is completed within this period. If a certificate has expired, generate a new one using the previous steps outlined.

4.3 Copy the generated Activation Certificate and paste it into the Activation Certificate field in the Activation window you opened in your browser. Select **Activate** when you are done.



#### A license is generated.

$\leftarrow \rightarrow G$	Ô	https://www	v.activationpo	ortal.me/selfse	ervice/activati	on รู	ò	£≡	Ē		
Activation Successful											
cense											
16aaf17100e6297ad2 f770718eb4a2c52edt a0b5d2f021914c85fd 2650dfd673278150b. e68a8552cb10072bcc b1b6570ef06c76f742 1a65b75a8098aa5fa2 92fbc4958d26d2c8f6 054c9db6e4a44a81a 6aa983f9c6ad4ed3dd	3cf764e2 99032e7 943a5a2 2427116 6f6b485 1816eee 1321ad 618fa22 1728bd 5b45e1a co41741	2c27823a741 e9828e7578 29df733edd0 54ed8fa6bf49 41c40172a3 87a898ba11e 6af1abddb9 ic0ad1234c8 44d610159a1 fae8b94aa3c e7947270ac	6812451681f6 e1d7a0b4574 )8bf6bf864c9ff 916ac49ebbcc 4c753b8aeb8a e87882ab9d31 ad5b1e121ed3 e4cc9fed7359 12f28eac0e434 12f28eac0e434 12f28eac0e434 141b46db3a8	7535c7d18c2 b7f54e0aebf7f b2372e773d61 777c822ea725 i3a1427d4777 b3a8b7842be 3d7b542237f1 4c7a55d2c5b8 42f93c369cb06 ac39af447520 d67a44de5ab5	12bafad02074 93472e3318a 169f4b697611 75e9207dce7/ 5128dca12a36 d6ed78997f85 15b8c089ee65 15b8c089ee65 15f89aef85919 55f89aef85919 6534abc41a4f icd650252f8dd	54e37ce8 75a0d799 1b36ea2d cd2a5318 aef00ce8 16aa6d6 92094513 a4be2830 930c63bc 33c669f0 d140cbd5	fac3178 3fc0573 427160 1e8a09 c96a0c8 40c0246 3d18b6 eec420 1f5e7ff 0811a7 05e486	1168ac 31da6 f2742i 22319 3fa95a 22bcf5 22f2ae e71b4 ad93e 09a44i 47aa4	b1c0d 58fe2ed 56f4bd 74460- 6f7f62 41d0e cda6ab bde61 2a5c57 8fd6e7 b139a	17c21aa7 d0d3112 l8d83f61 41ff932a 79115ef 52b5ad 56c21fc 153ff77a 7d592d2 rc15c8a3 0edb68e	76 94 17 59 66 47 17

4.4 Copy and paste the generated license into the License field provided in the Offline Activation screen (Step #6). Click **Activate** when you are done.

💊 Altair Monarch License Manager		-		$\times$
Altair Monarch 2023: License Information	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
				m.
				10
Product successfully activated.				<i>in</i>
				h h
				hh
				$\forall$
M MAR I				_
My Malanda and My	Со	nfigu	re Licen	se
				_
			Finis	h

Upon successful activation, the following screen displays.

5. Select Finish when you are done.

You can choose to change the license method for your Monarch install by selecting the **Configure License** button. Doing so returns you to the *Choose License Method* screen.

You may now run and use Monarch.

#### Activating Monarch via E-mail or Phone Support

To activate Monarch via e-mail or phone, note your Activation Code, Installation ID, and Computer ID and then contact support via the following:

#### **US and Canada**

Phone: +1 800 988 4739; +1 978 275 8350

#### Europe, Middle East, and Africa

Phone: +44 808 189 2481

Email

dasupport@altair.com

#### **Configuring Proxy Server Settings**

If you are using a proxy server to connect to the Internet, you will first need to set up License Manager to use the correct proxy server. Otherwise, skip this step.

Steps:

1. Launch the Altair Monarch License Manager. The License Manager displays.

🔍 Altair Monarch License Manager		_		×
Altair Monarch 2023: Choose License Method	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
Before you can use Altair Monarch 2023 you need to specify a license type. Please following options:	e choose f	rom t	he	
🔿 Start Trial				
Activate Altair Monarch 2023 using an Activation Code				
Connect to a Monarch License Server				
O Connect to an Altair License Management System				
O Use a Volume License Key File				
Mr. North many my hit				
Cance	el <	Back	Nex	t >

2. Ensure that the Activate Altair Monarch 2023 using an Activation Code button is selected and then click Next. The Activate License screen displays.

🔍 Altair Monarch License Manager	-		$\times$
Altair Monarch 2023: Activate License Settings	Info	About	<u>Help</u>
Enter your Activation Code, make sure you are connected to the internet and press Activate	е.		
Activation Code:			2
	nN	WW	Y \
If you are not connected to the internet, press the Offline Activation button below.			
			A.
			Y Y
M. M. M.			
M. N. BARMAN MAN			
Settings         Offline Activation         Cancel         <	Back	Activ	ate

3. Select Settings to configure proxy settings.

The Activation Settings dialog displays.

🔍 Activation Settings	- 🗆 X
Proxy Daemon Proxy Logging Security	┌ Status
Proxy Server name or address:	License Status:
	No License. (Returned license to server)
Port:	Computer ID:
	DdNj0EMQ9ymHV6tlFHn0
Optional Authentication:	Filechck.dll Version:
Username:	3.7.110.14
Password:	
Automatically detect proxy settings	
Reset	

4. Enter the required proxy settings and then close the dialog box.

Now you are ready to activate Monarch.

#### **Specifying Logging Levels**

Log files for Monarch License Manager can usually be found in C:\ProgramData\Datawatch\Licensing\Nalpeiron\Datawatch Monarch 19. You can change the amount of information provided in the log files via the Logging tab of the Activation Settings window.

Steps:

1. In the Activation Settings window, select the **Logging** tab.

🔍 Activation Settings	— 🗆 X
Proxy Daemon Proxy Logging Security	Status
Log Level:	Liconco Statuc
Off 🔻	License Status.
	No License. (Returned license to server)
Log File Directory:	Computer ID:
C:\ProgramData\Datawatch\Licensing\Nalpeiron\Datawat	
	Filechck.dll Version:
	3.7.110.14

2. From the drop-down menu in the Logging tab, select a log level.

S Activation Settings	- 🗆 X
Proxy Daemon Proxy Logging Security	┌ Status
Log Level:	License Status
Off Jm	No License. (Returned license to server)
Off	Computer ID:
Errors only	DdNj0EMQ9ymHV6tlFHn0
Errors and warnings	Filechck.dll Version:
Errors, warnings and informational messages	3.7.110.14
Errors, warnings, info and debug	

Accepted values include Off, Only Errors, Errors and warnings, and Errors, warnings, info, and debug.

You must restart the application for the settings specified in the Settings window activation come into effect.

#### **Specifying HTTPS Settings**

Some firewall rules prohibit HTTP traffic. In this case, you must enable HTTPS connections via Monarch License Manager.

Steps:

- 1. From the Choose License Method screen, ensure that the Activate Altair Monarch 2023 using an Activation Code button is selected and then click Next. The Activate License screen displays.
- 2. Click Settings at the lower left-hand corner of the screen.
- 3. In the Activation Settings window that displays, select the **Security** tab.

🔍 Activation Settings	- 🗆 X
Proxy Daemon Proxy Logging Security	┌ Status
Use HTTPS	License Status:
	No License. (Returned license to server)
	Computer ID:
	DdNj0EMQ9ymHV6tlFHn0
	Filechck.dll Version:
	3.7.110.14

4. Ensure that the **Use HTTPS** box is ticked to allow HTTPS connections.

# **DEACTIVATING MONARCH**

If you wish to use Monarch on a different machine, you will first need to deactivate Monarch on the current machine and then reactivate the software on a new machine.

There are three ways you can deactivate your copy of Monarch:

- Deactivate Monarch using the Altair License Management System
- Use the built-in License Manager that is installed together with Monarch
- Deactivate over the website
- D Phone or e-mail Altair Support

### DEACTIVATING MONARCH USING THE ALTAIR LICENSE MANAGEMENT SYSTEM

If you activated your copy of Monarch using an Altair Activation Key, you can deactivate your Activation Key via the Altair License Management System.

Steps:

- 1. In Altair Monarch License Manager, select the **Connect to an Altair License Management System** option in the **Choose License Method** screen and then click **Next**.
- 2. Select the Activation tab in the Altair Units License Configuration screen, and then click Deactivate.

🔍 Altair Monarch License Manager		-		$\times$
Altair Monarch 2023: Altair Units License Configuration	<u>Settings</u>	Info	About	<u>Help</u>
Managed Licensing Activation Local Licensing		-		
Activation Key:				
License Store: User 🔹 🕑				N
C:\Users\admin\AppData\Loca\\altair licensing\DESKTOP-PRMNUBG\licenses(=N?p? Import License File Status	Deactiv	ate	Activat	te
Information		1	Aw	YAy
ALTAIR_LICENSE_PATH:				W.
Advanced				
Borrowing Duration (in hours): 24 Optimization:	Auto		1	
Advanced Licensing Tools Ping	est Connec	tion	Hostl	Ds
Cano	el <	Back	Conr	ect

A popup displays to confirm that your license has been deactivated.

License deactivated.	has been
	ОК

### **DEACTIVATING MONARCH ONLINE**

You can deactivate Monarch using the License Manager if you activated the software using an Activation Code. If you activated Monarch any other method, call or <u>e-mail Altair Support</u>.

Steps:

- 1. Launch the License Manager.
- 2. The License Manager initially displays the License Information screen.

🔍 Altair Monarch License Manager		-		$\times$
Altair Monarch 2023: License Information	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
Product successfully activated.				
M. Martin manufil	Co	nfigur	re Licen: Finis	se

3. Click the Configure License button.

4. Select Deactivate Altair Monarch 2023 using an Activation Code to display the *Deactivate License* screen.

🔍 Altair Monarch License Manager		-		×
Altair Monarch 2023: Choose License Method	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
Before you can use Altair Monarch 2023 you need to specify a license type. Please following options:	choose f	rom t	he	
◯ Start Trial				
Deactivate Altair Monarch 2023 using an Activation Code				
O Connect to a Monarch License Server				wa -
Connect to an Altair License Management System				YW
O Use a Volume License Key File				M
		_	-	+
MARAMA MAMMA				
Cance	<	Back	Nex	t >

5. The Activation Code you used to activate Monarch with automatically displays in the *Activation Code* field. Select **Deactivate**. A dialog box will inform you that Monarch has been successfully deactivated.



### **DEACTIVATING MONARCH OFFLINE**

When deactivating Monarch offline, you will need the assistance of your systems administrator or Altair Support.

Steps:

- 1. Perform Steps 1 and 2 of the previous section to launch the Deactivate License screen.
- 2. Click the Offline Deactivation button on this screen. The following note displays.



Click **OK** to continue to the Offline Deactivation screen.

R AI	tair Monarch License Manager		—		$\times$
Alt	air Monarch 2023: Offline Deactivation Settin	igs	<u>Info</u>	<u>About</u>	<u>Help</u>
1)	Please enter License Activation Code				
2)	Open the deactivation link in a web browser or copy link to the clipboard:				
3)	Click Export to generate a Deactivation Certificate and deactivate the license.				
	Export				N
	Note: local license will be deactivated immediately after the Certificate is generated pressed).	('Exp	bort'	button	W
4)	Copy the Deactivation Certificate and paste into the box labelled "De-Activation Ce site, check the terms and conditions box and click the "De-activate License" button. appear stating the process was successful. You can now close the web browser.	rtifica A m	ate" o essag	on the v ge shou	veb Id
1	Make sure that current step has been completed successfully to avoid License Code	bloo	king	•	
		Cano	el	< Ba	ack

- 3. With your systems administrator or Altair Support, follow the instructions provided in this screen to manually deactivate your Monarch installation.
  - 3.1 Open the **deactivation page** of the activation website by clicking the link provided in Step 2 of the Offline Deactivation screen.
  - 3.2 Click **Export** on the *Offline Deactivation* screen to display a **Deactivation Certificate**. This certificate is displayed in the text field of Step 4.
  - 3.3 Copy the generated deactivation certificate by clicking the **Copy** icon and then paste it into the *De-Activation Certificate* field of the Nalpeiron webpage.
  - 3.4 Check the appropriate box to confirm your having read and agreed to the terms and conditions of Monarch deactivation and then click the **Deactivate License** button.

The license will be deactivated and available for use on a different machine.



### DEACTIVATING MONARCH VIA E-MAIL OR PHONE SUPPORT

To deactivate Monarch via e-mail or phone, note your Activation Code, Installation ID, and Computer ID and then contact support via the following:

**US and Canada** 

Phone: +1 800 988 4739; +1 978 275 8350

Europe, Middle East, and Africa

Phone: +44 808 189 2481

Email

dasupport@altair.com

# **CONFIGURING LOGGING**

Log files for License Manager are typically located in C:\Users\Administrator\AppData\Local\Temp.

To modify the location of log files and the amount of information found in these files, click **Settings** on the upper righthand corner of the License Manager.

The License Manager Settings dialog displays.

🖕 Altair Monarch Li	cense Manager S	ettings		
Logging Sec	urity Advance	ed		
Logging Level	: Off			-
Logging Direc	tory:			
C:\Users\admi	n\AppData\Loo	al\Temp		Browse
ОК			Reset to defaults	Cancel

Using the drop-down provided in the Logging tab, select a logging level using the following table as a guide:

Value	Description
Off	Logs no events.
Error	Logs all exceptions.
Warning	Logs events that have occurred or may occur and cause an otherwise normally running application to malfunction.
Information	Logs events indicating successful application execution regardless of whether the application is working properly or not.
Verbose	Logs low-level events for both user code and servicing Used for debugging purposes

You can also select a new folder in which to store log files by clicking on the **Browse** button. Doing so launches a *Select Folder* dialog that you can use to specify a new log file location.

## CONFIGURING SECURITY PROTOCOLS

Previous versions of License Manager only allowed the SSL 3.0 and TLS 1.0 security protocols by default (.NET 4.5 application defaults). The current version of License Manager allows implementation of other protocols, including TLS 1.1 and TLS 1.2.

To configure which security protocols to enable, launch the **License Manager**, click on the **Settings** link located on the upper right-hand corner of the dialog and then click the **Security** tab from the Settings dialog that displays.

Altair Monarch License Manager Settings		×
Logging Security Advanced		
Enabled protocols		
SSL 3.0	✓ TLS 1.0	
✓ TLS 1.1	✓ TLS 1.2	
OK	Reset to defaults	Cancel

By default, all protocols are enabled. Uncheck the boxes to the left of the security protocols you with to disable. Note that TLS1.2 must be enabled to successfully register trial user information.

Click **OK** to save your changes, **Reset to defaults** to reverse your changes, or **Cancel** to close the dialog without saving your changes.

## DISABLING/ENABLING LEGACY AND NALPEIRON LICENSING METHODS

The default licensing options for Monarch are an Altair License Management System and Monarch License Server. If you wish to enable legacy licensing options (i.e., activation code and volume license key file), click **Settings** on the upper right-hand corner of the License Manager and then select the **Advanced** tab.

Tick the box for **Display legacy licensing methods** and then click **OK**.

S Altair Monarch License Manager Settings	×
Logging Security Advanced	
_ Nalpeiron	
Disable Nalpeiron licensing method 😧	
Display legacy licensing methods ?	
<ul> <li>Note: changed settings will be applied after application restart.</li> </ul>	
Cance	

If you would like to reset the application defaults, click the **Reset to defaults** button. To cancel any changes, click Cancel.

Restart Monarch License Manager. Legacy licensing methods will display in the Choose License Method screen.

S Altair Monarch License Manager	-		×
Altair Monarch 2023: Choose License Method Settings	<u>Info</u>	About	<u>Help</u>
Before you can use Altair Monarch 2023 you need to specify a license type. Please choose fi following options:	rom t	he	
🔿 Start Trial			
<ul> <li>Activate Altair Monarch 2023 using an Activation Code</li> </ul>			
O Connect to a Monarch License Server			
O Connect to an Altair License Management System			
Use a Volume License Key File			
		1	+
Mr. North Martin			
Cancel < I	Back	Nex	t >

In some instances, using Nalpeiron licensing may lead to issues that prevent other licensing methods from functioning as they should. When this happens, you may wish to disable the Nalpeiron Licensing method for your Monarch installation.

To do so, click **Settings** on the upper right-hand corner of the License Manager and then select the **Advanced** tab.

Tick the box for **Disable Nalpeiron licensing method** and then click **OK**.

S Altair Monarch License Manager Settings	×
Logging Security Advanced	
✓ Disable Nalpeiron licensing method 3	
✓ Display legacy licensing methods ②	
Note: changed settings will be applied after application restart.	5
OK Reset to defaults Cancel	

If you would like to reset the application defaults, click the **Reset to defaults** button. To cancel any changes, click **Cancel**.

Restart Monarch License Manager. When Nalpeiron licensing is disabled and legacy licensing options are enabled, the option to license Monarch using an activation code no longer displays in the Choose License Method screen of the Monarch License Manager.

S Altair Monarch License Manager	_		Х
Altair Monarch 2023: Choose License Method	<u>gs Info</u>	<u>About</u>	<u>Help</u>
Before you can use Altair Monarch 2023 you need to specify a license type. Please choos following options:	e from t	the	
O Connect to a Monarch License Server			
O Connect to an Altair License Management System			
O Use a Volume License Key File			MA.
My Nasa many many			
Cancel	< Back	Nex	t >

# **VIEWING COMPUTER INFORMATION**

The name and domain name of the computer from which License Manager is launched can be viewed by clicking on the **Info** link located at the upper right-hand corner of all major License Manager screens.

The following dialog displays:

🔍 Computer Details		×
Machine name:	desktop-prmnubg	B.
Domain machine name:		
	ОК	Copy to clipboard

Click the **Copy** button located to the right of each field in the dialog to copy the information and then paste it where necessary.

# **UPGRADING MONARCH**

Monarch upgrades may be considered a minor upgrade, an example of which could be installing Monarch version 2022.1 after installing Monarch version 2022, or a major upgrade, an example of which could be installing Monarch version 2023 after initially installing Monarch version 2022.

The upgrade process may generally be summarized as follows.

#### Steps:

- 1. Determine what type of upgrade you wish to implement. You will not require a new license or activation code when making minor upgrades. However, when making a major upgrade, a new license or activation code is required.
- 2. If you wish to perform a major upgrade, obtain a new Monarch license or activation code. Fill out the form that displays when you click **Contact Support** in the <u>Altair Community</u> page. Select Licensing from the categories available and request for a new license or activation code. Remember to include your old activation code or attach your old license file to your ticket. Our support staff will initiate the process of generating a new code or license file for you and guide you through the rest of the upgrade process.

If you wish to perform a minor upgrade, skip Step 2 and move on to Step 3.

- 3. Download a newer version of Monarch from the Altair Marketplace.
- 4. Run the installer and activate your copy of the application as usual.

You can install a newer version of Monarch via one of two ways:

- Install the new version over the existing application. This option is preferred when performing a minor upgrade. If you upgrade a previous Monarch version that was activated via an activation code or license key file, the upgraded version is automatically activated using this code or file.
- Uninstall the old version and then install the new application. This option is preferred when performing a major upgrade.

When uninstalling a previous version of Monarch activated with an activation code, the Uninstall Wizard asks whether your license should be deactivated.

If you intend to perform a <u>minor upgrade</u>, select **No** to enable automatic activation when your Monarch is upgraded.

# **CONTACTING ALTAIR SALES**

The **Contact Altair Sales** option is displayed in the *Choose License Method* screen of the License Manager when Monarch is being used in Trial mode or when the Trial mode has expired and you have not activated the software.

If you would like to contact Altair Sales, select the **Contact Altair Sales** button in the *Choose License Method* screen of the License Manager and then select **Next**.

Contact details for Altair Sales display.

🔍 Altair Monarch License Manager			_		$\times$
Altair Monarch 2023: Contact Altair	<u>Se</u>	<u>ttings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
For more information, please visit our website.					
You can also email us using the links below.					
For the quickest response, please choose the app	ropriate e-mail address for your re	gion.			
North America:	sales@datawatch.com				
Europe, Middle East and Africa:	sales_euro@datawatch.com				
Asia Pacific:	sales apac@datawatch.com				
the Minut with					
111 Nation March					
		Can	cel	< Ba	ack

#### **CONTACT US**

#### **GET IN TOUCH**

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

#### SALES CONTACT INFORMATION

**US:** +1 800 445 3311 International: +1 978 441 2200

#### **Sales Email**

US: <u>sales@datawatch.com</u> Europe: <u>sales\_euro@datawatch.com</u> Asia Pacific: <u>sales\_apac@datawatch.com</u>

#### SUPPORT CONTACT INFORMATION

Customer Portal: https://community.altair.com/community Email: dasupport@altair.com US and Canada: +1 800 988 4739, +1 978 275 8350 Europe, Middle East, Africa: +44 808 189 2481