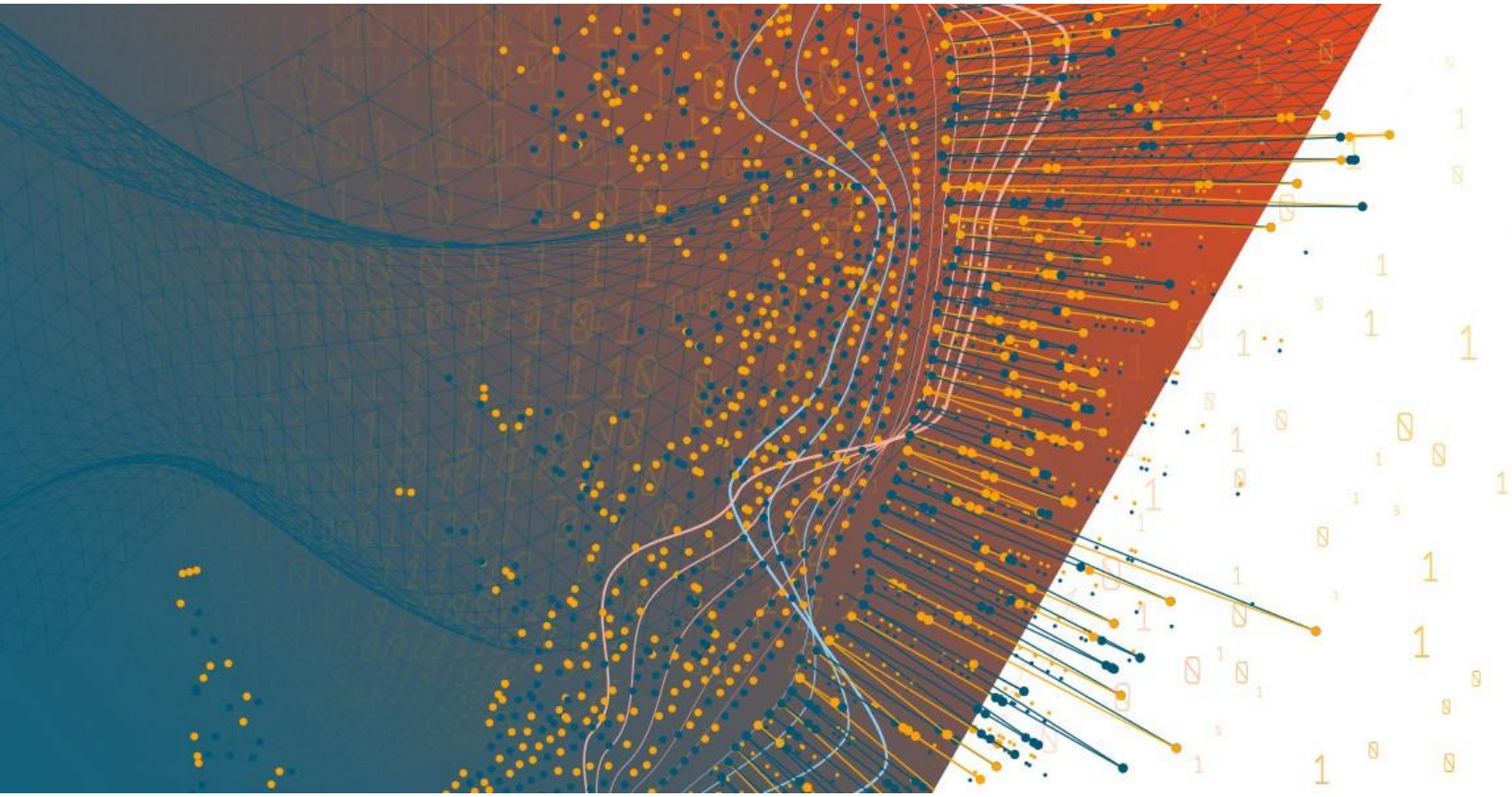

ALTAIR

Altair® Monarch® 2023

INSTALLATION AND ACTIVATION GUIDE

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INTRODUCTION

Altair® Monarch® 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

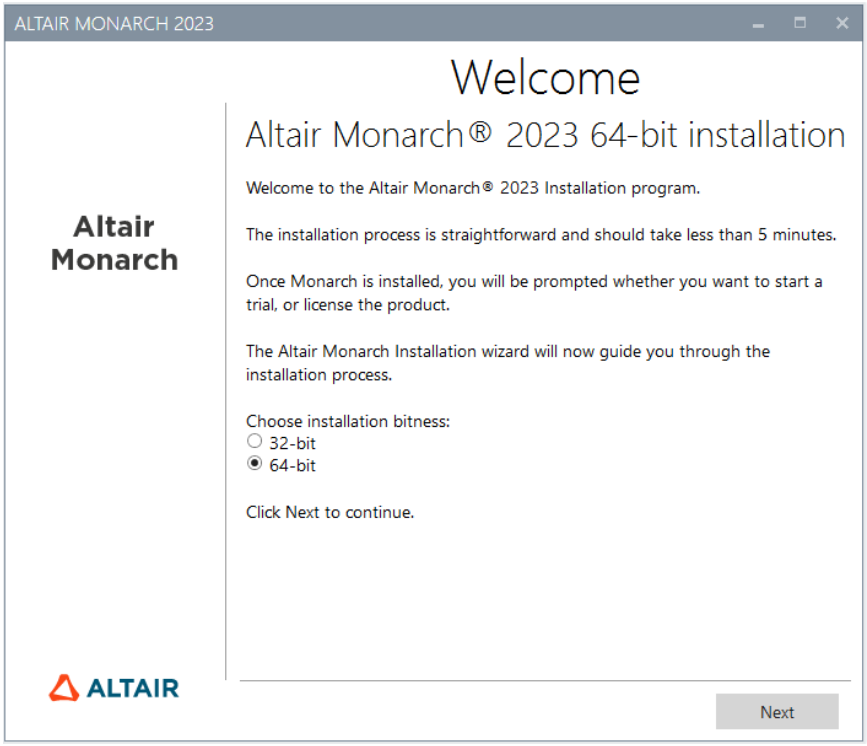
This guide will take you through the installation and activation process of Monarch version 2023.x.

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.



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.

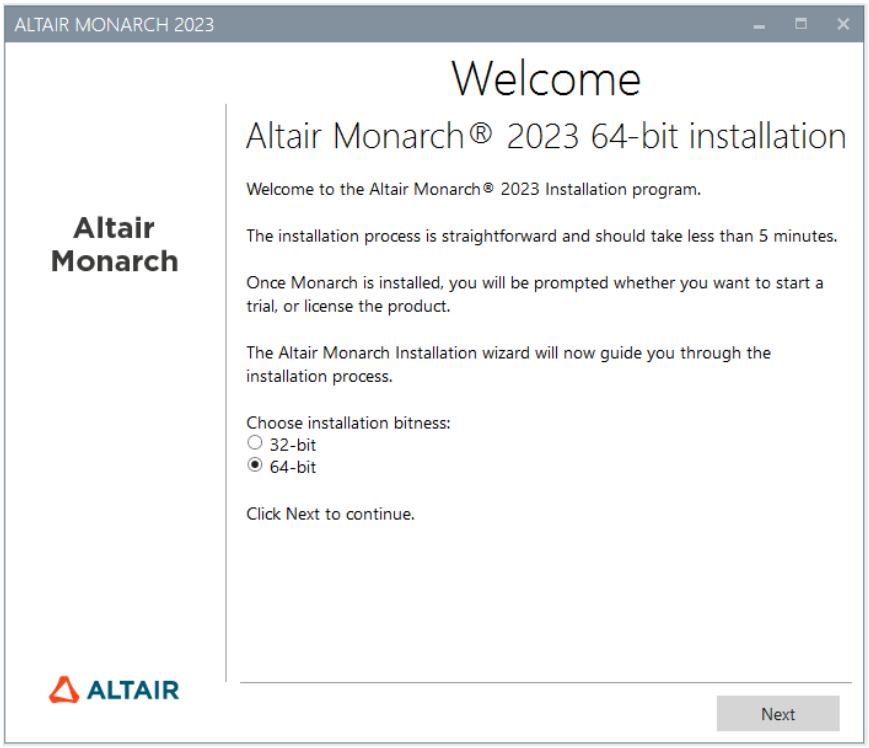
INSTALLING MONARCH

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.

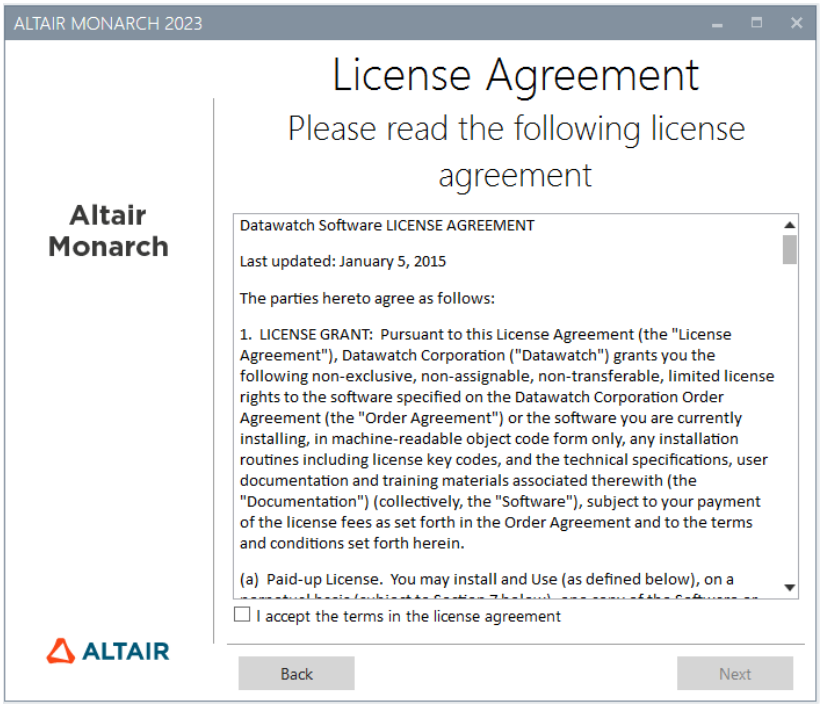
2. The first of these prompts introduces you to the installation program and reminds you of the need to either activate your copy of Monarch or use Monarch on a trial basis after you finish installing the application.



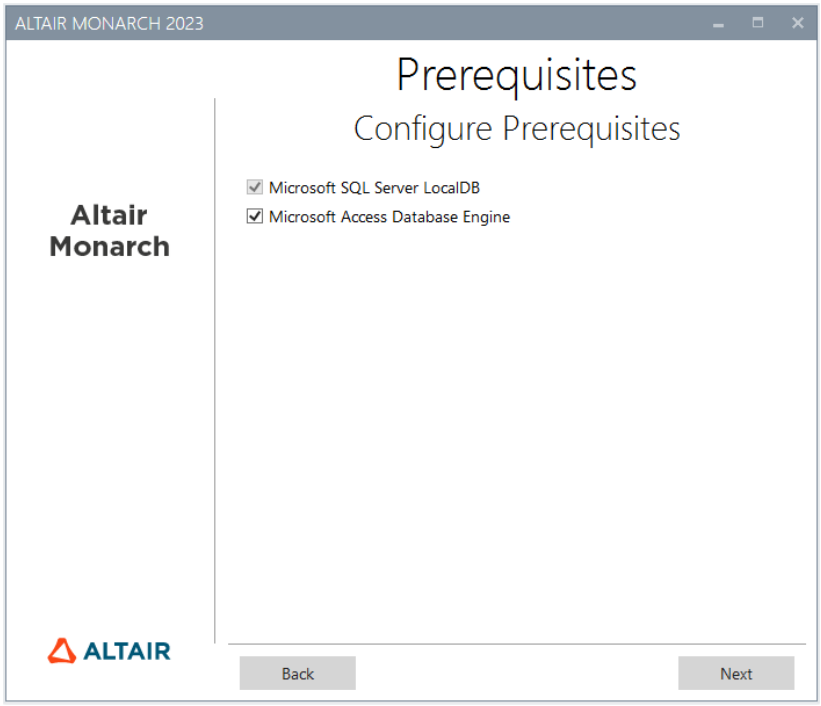
   You must select a Monarch bitness to install before proceeding to the next screen.

   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.

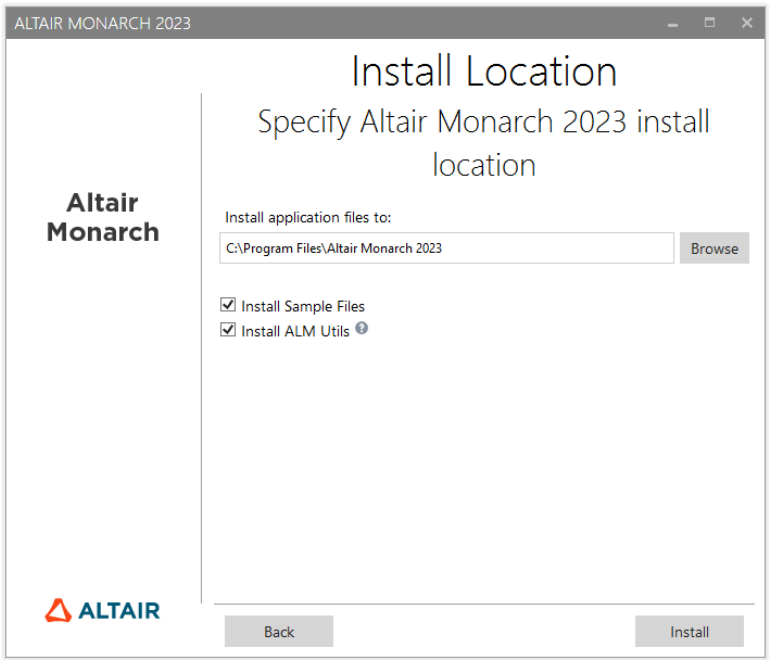


Deselecting the Microsoft Access Database Engine option displays a warning icon. Hovering over this icon shows the following message.

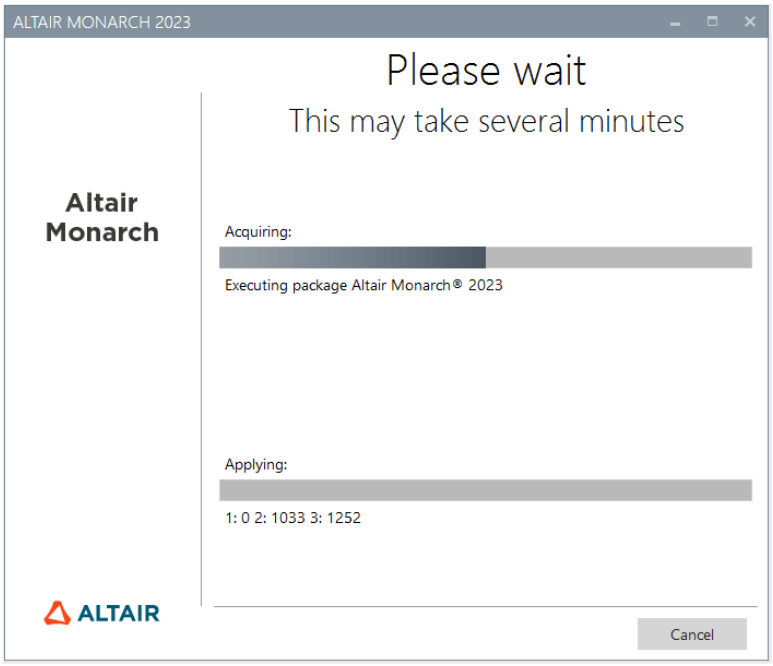
If you wish to proceed with the installation, click **Next**.

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.

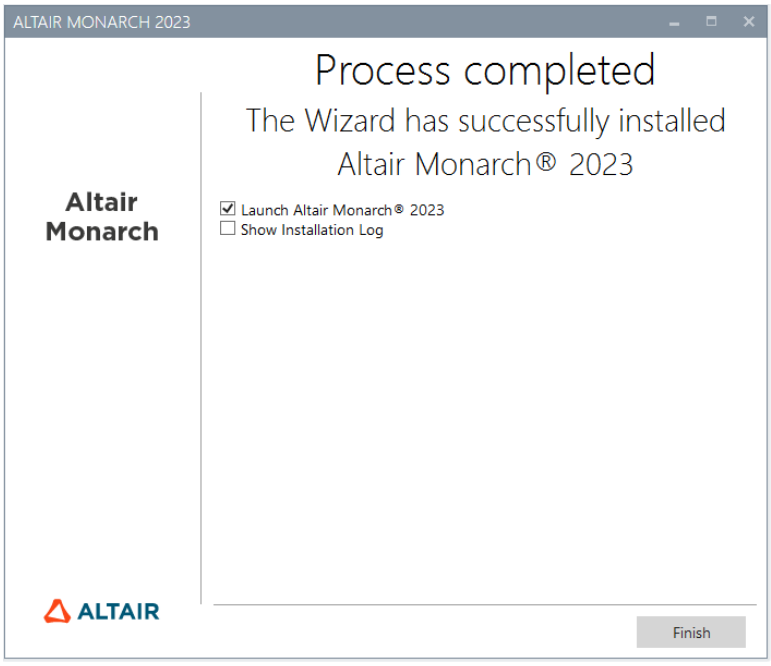


When you click **Install** in the third installer prompt, the installation proper begins. This step may take some time.



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.



INSTALLING AND USING MONARCH IN A CITRIX ENVIRONMENT

System Setup

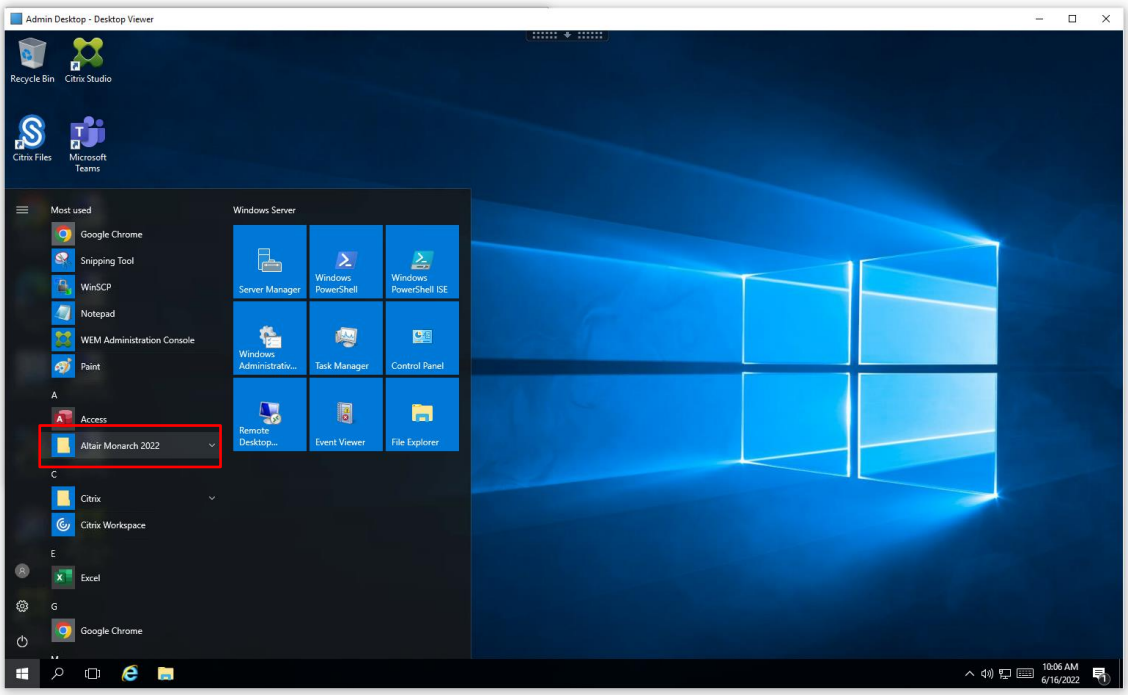
When deploying Monarch in a Citrix environment, Monarch is ideally installed in a machine that belongs to one delivery group and the License Server is installed in another machine that belongs to another delivery group. Such a setup will ensure increased security when Monarch is used by all authorized 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 here.

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

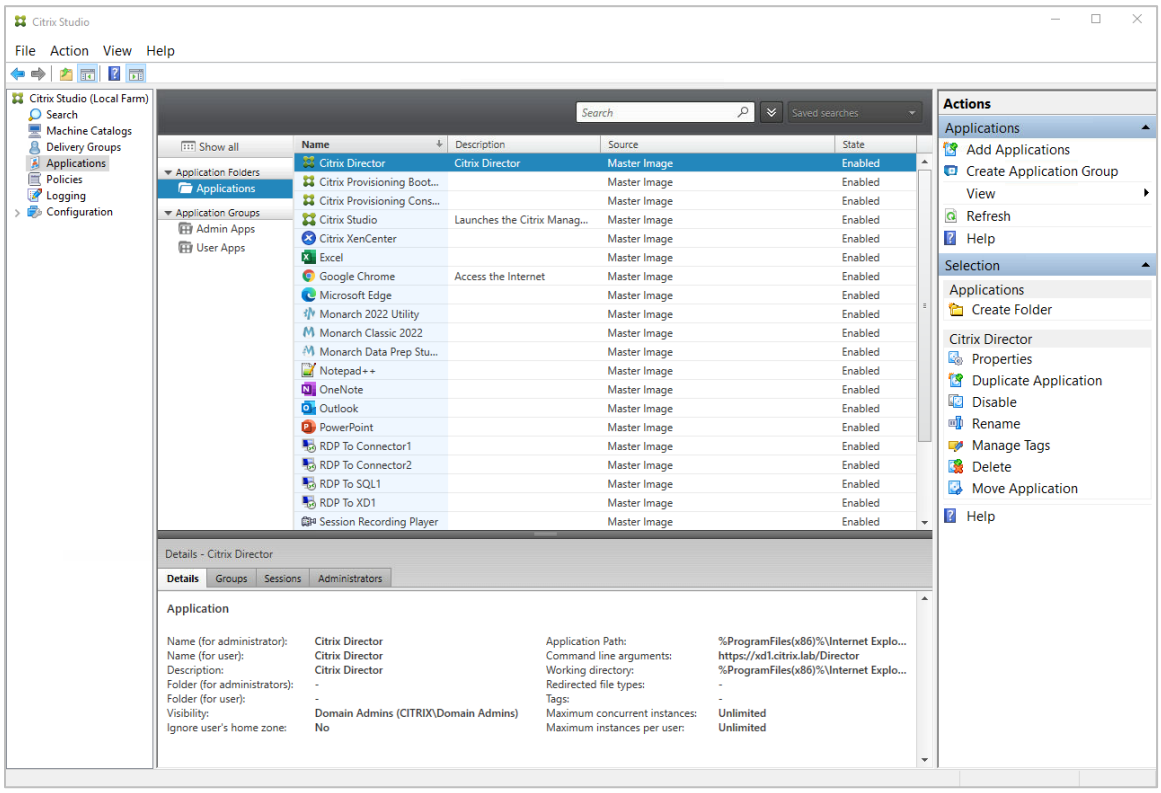
Installations of Monarch in Citrix can be activated via an Altair License Management System (i.e., managed licensing or on-prem license server) or Monarch License Server. Activation using a standalone license file or activation key/code is currently not supported for Monarch installations in Citrix.

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.

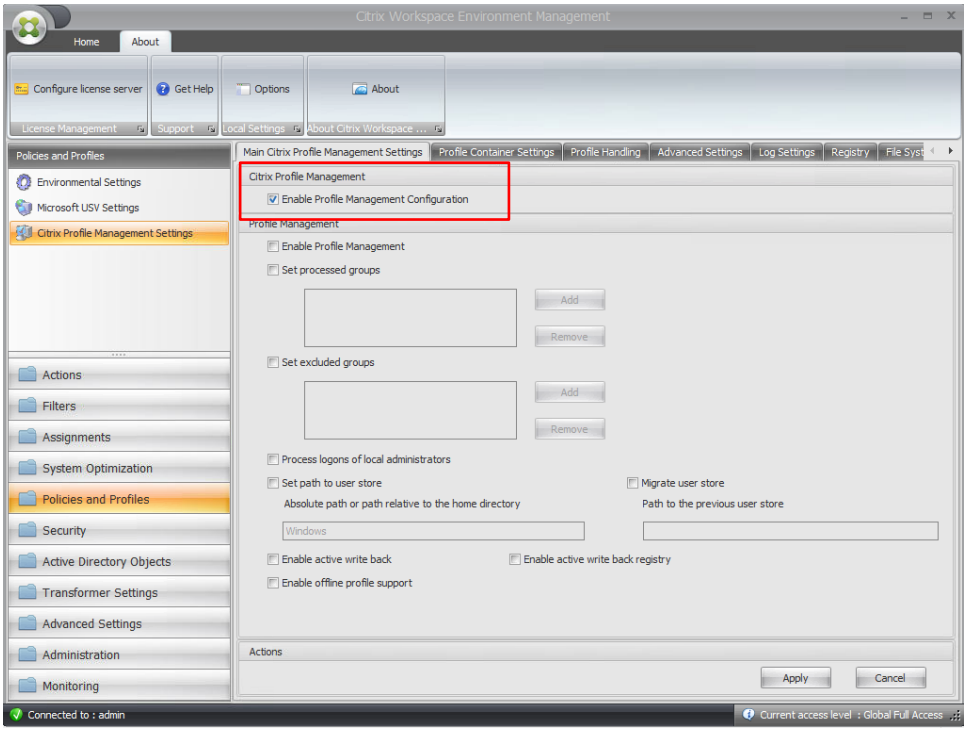


CONFIGURING PROFILE MANAGEMENT

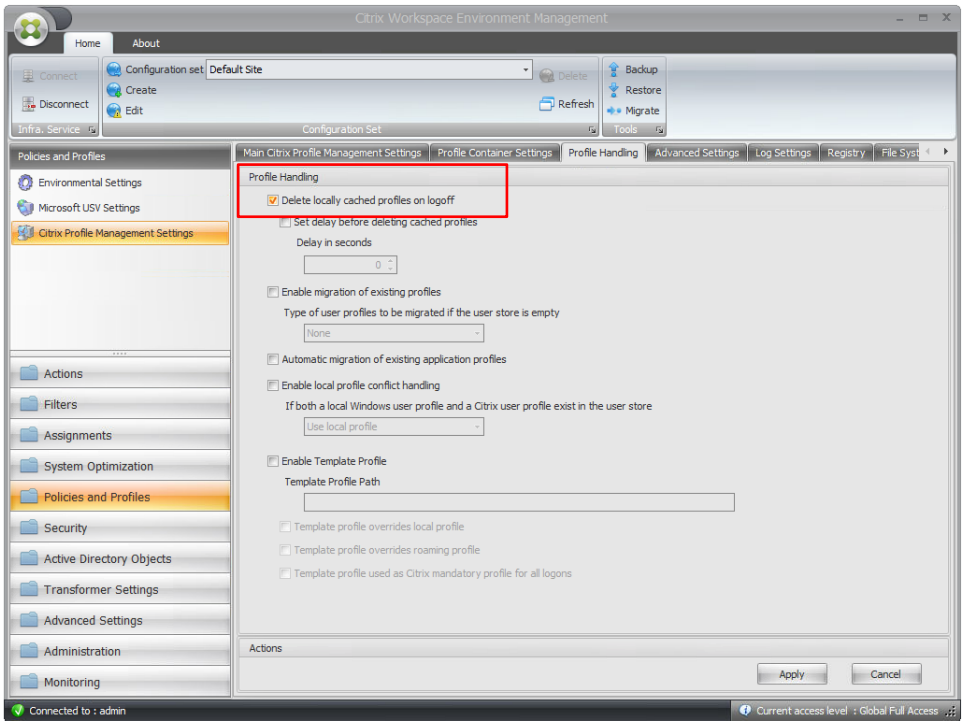
The Monarch application uses LocalDB to cache the logon data of users. This database is stored in a user's local profile. During a Monarch session, UPM actively works in the server to cache the data in the user's local profile. In some cases, Monarch is unable to detect the location of LocalDB and, therefore, 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:

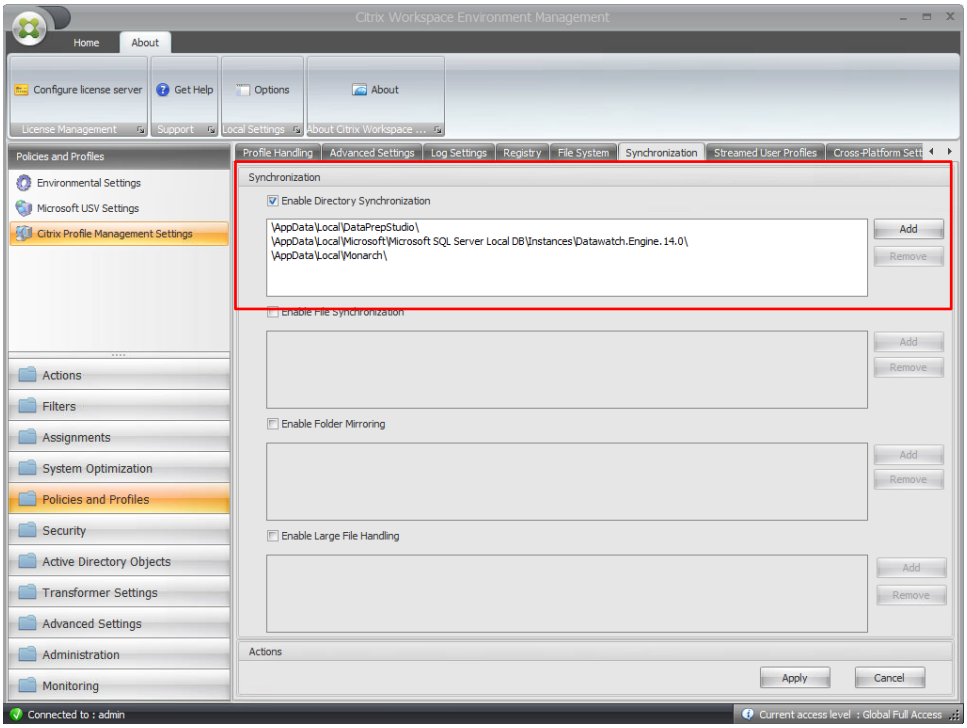
1. Using Citrix WEM Console, go to Policies and Profiles > Citrix Profile Management Settings and check Enable Profile Management Configuration.



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



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



Deployment

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

- ❑ Create a Machine Catalog
- ❑ Create a Delivery Group

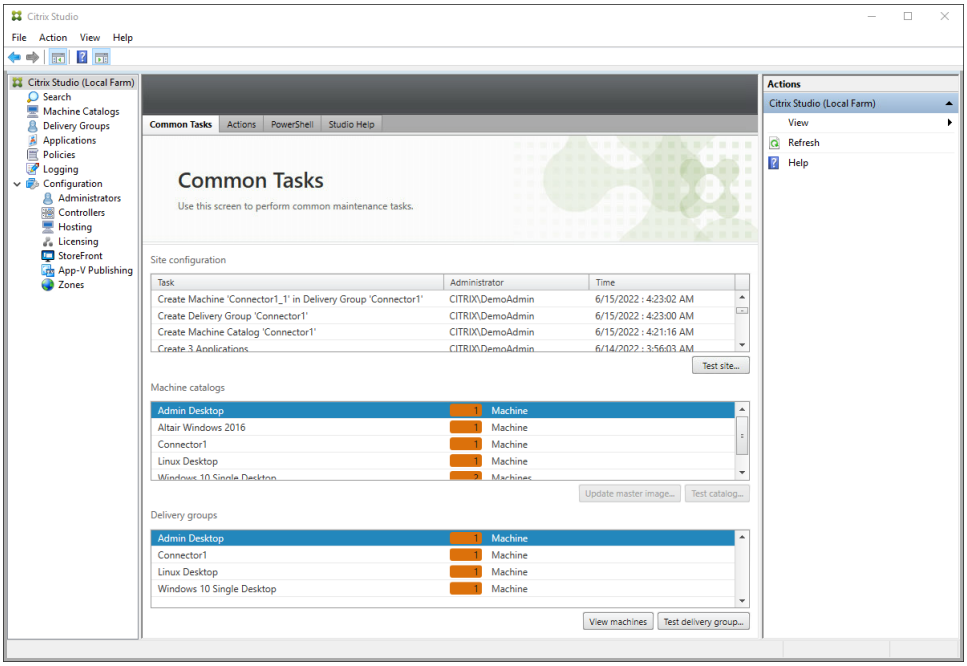
The following sections describe the details of each of these steps. In these sections, we assume that Monarch has been installed in a machine that is to be added to a machine catalog.

CREATING A MACHINE CATALOG

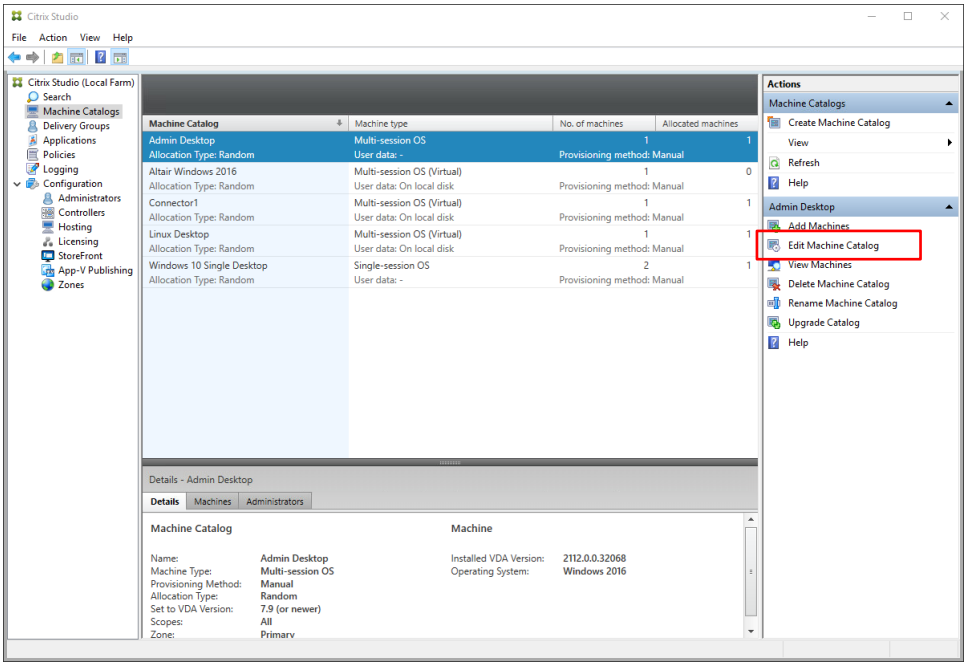
A machine catalog is a virtual or physical machine that can be assigned to a user to allow access to one or several applications.

Steps:

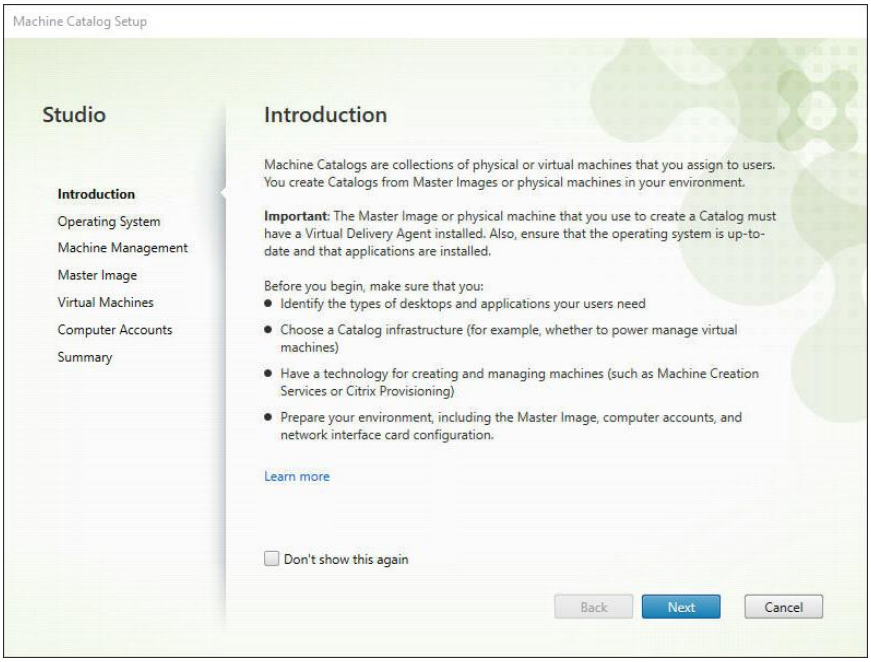
1. Login to the server where Citrix Studio has been installed. Log in as an Administrator and make sure you have administrative rights before proceeding.



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

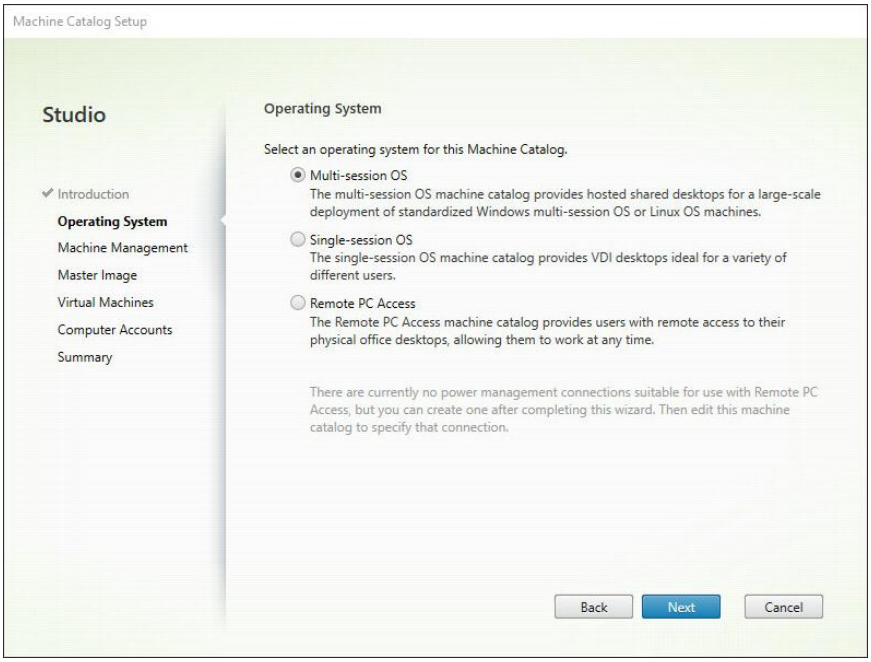


The Machine Catalog Setup Wizard displays.

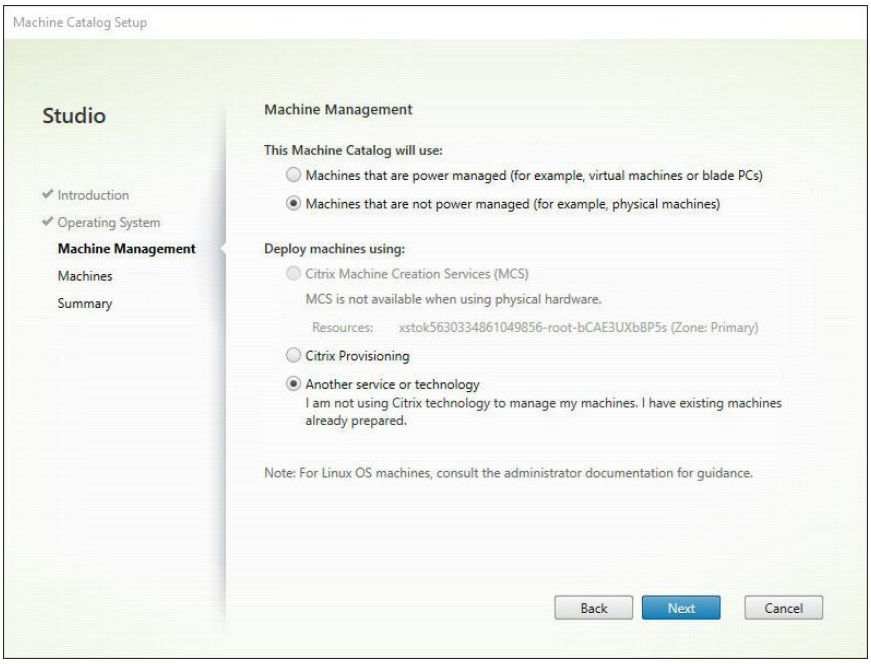


3. Click **Next** on this Wizard.

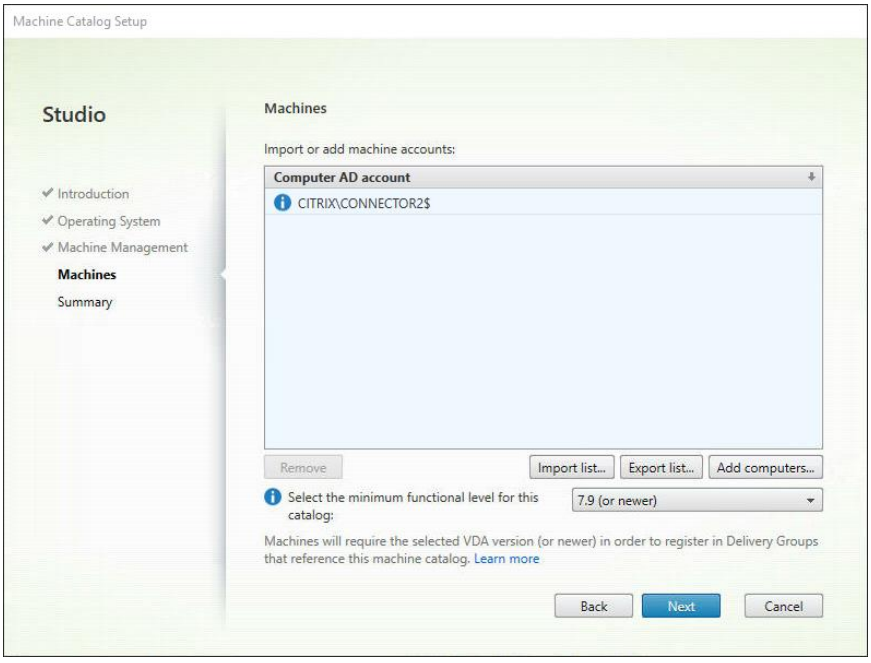
From the Operating System options that display, select **Server OS**.



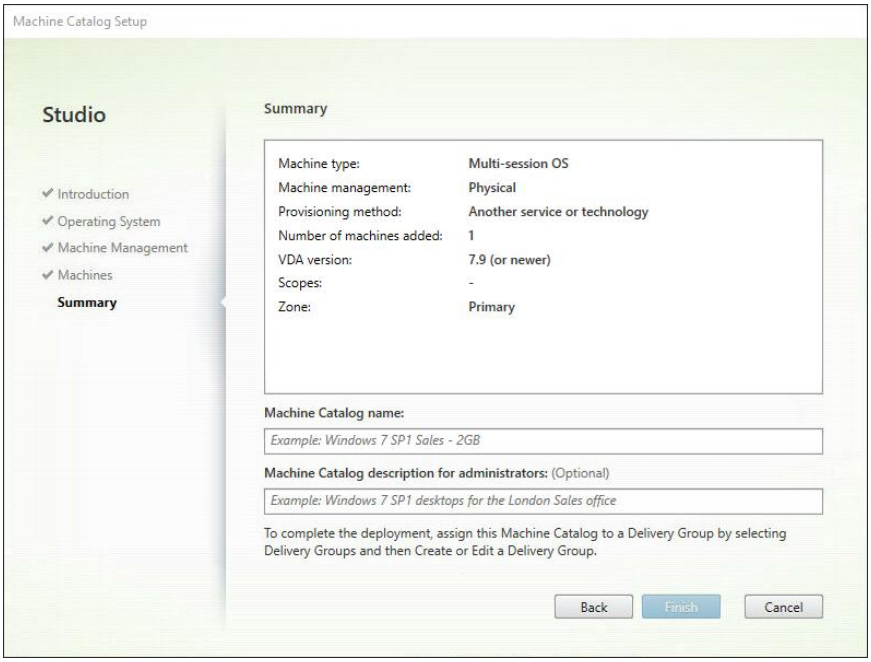
4. In the Machine Management screen that displays, select **Another service or technology** if the machine for which a catalog to be created is not managed by Citrix Provisioning Services or Machine Creation Services (e.g., a virtual machine). Click **Next** afterward.



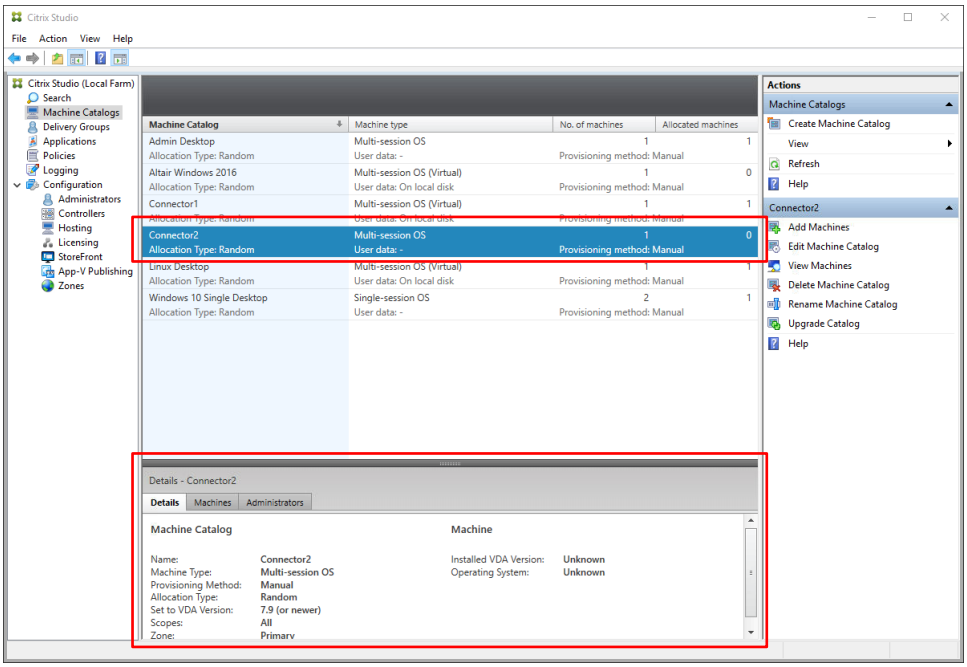
5. In the Machines screen that displays, click **Add computers** and, in the Select Computers dialog that displays, locate and select the Computer Active Directory account of Citrix Server. Click **OK** when you are finished. In the present example, **CITRIX\CONNECTOR2$** is added as a machine account.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



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



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

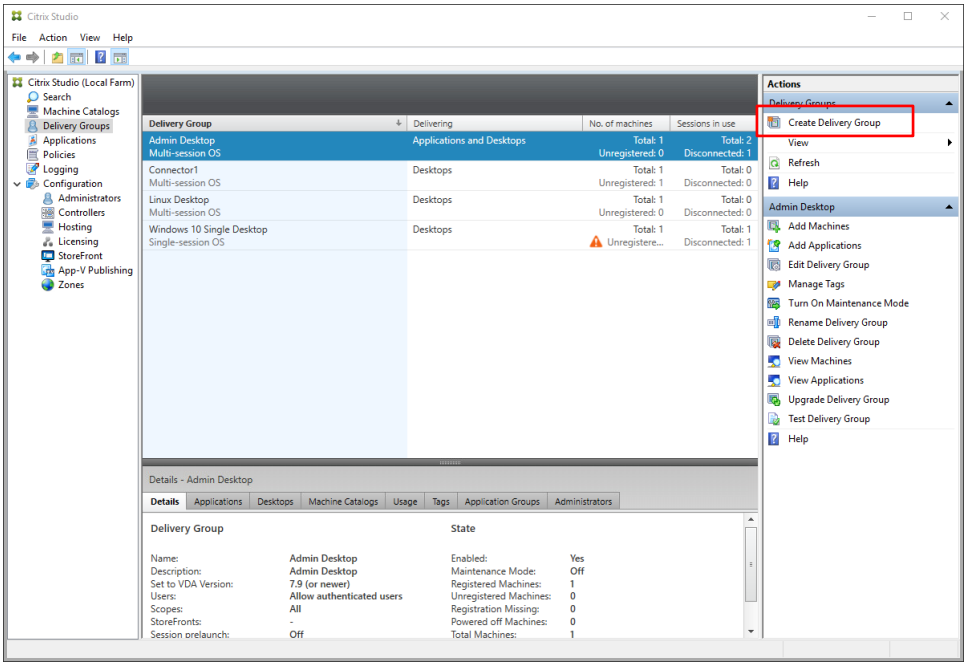


CREATING A DELIVERY GROUP

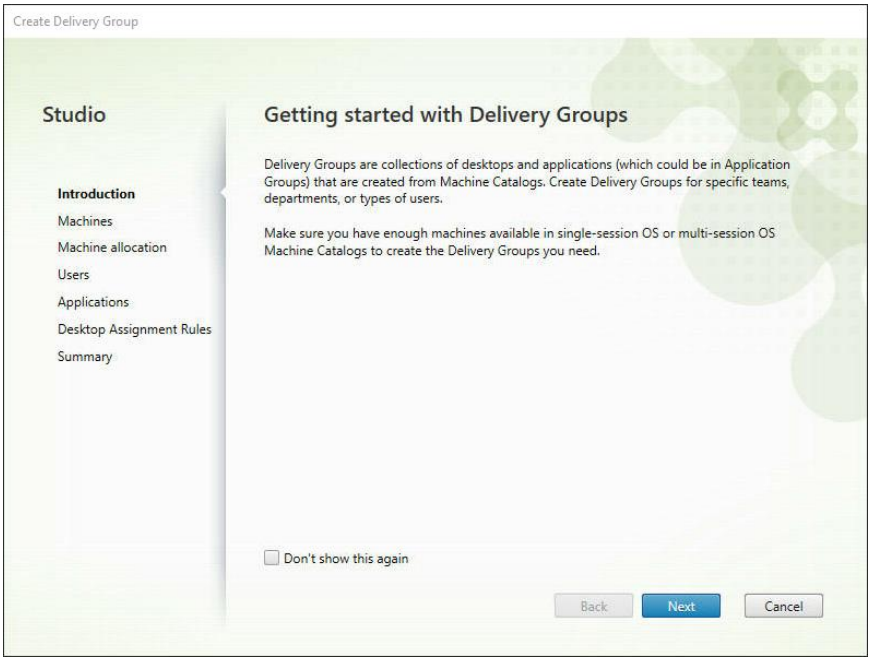
A delivery group is a collection of machines selected from one or more machine catalogs. Delivery groups specify which users can use those machines, and the applications available to those users.

Steps:

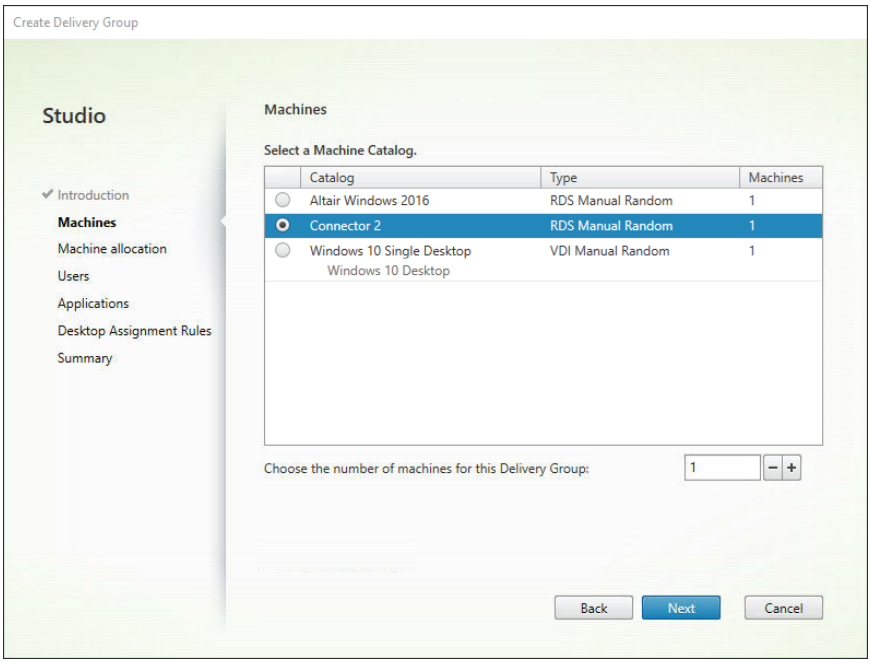
1. In Citrix Studio, select **Create Delivery Group** from the **Actions** menu.



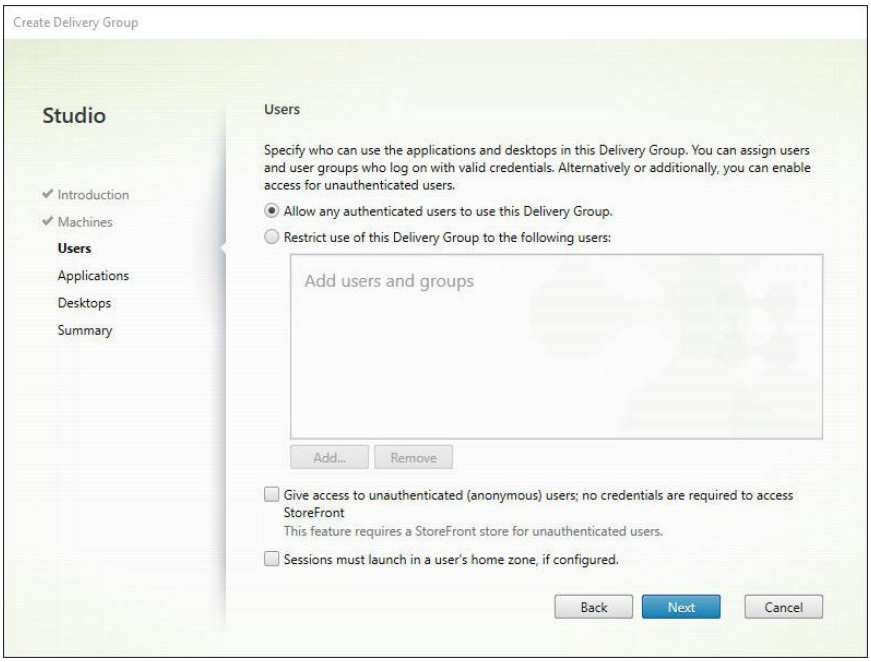
The Create Delivery Group Wizard displays.



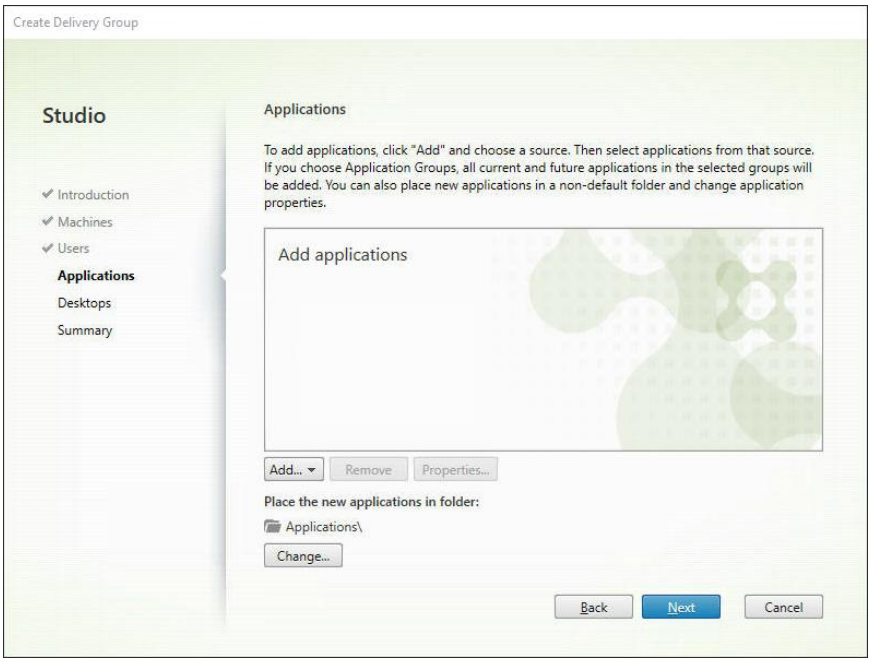
2. In the Machines screen, select the catalog you created and specify the number of machines to add to the delivery group. Note that you can add several machine catalogs to a delivery group but a machine catalog can only be assigned to one delivery group. Click **Next** when you are finished.



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.

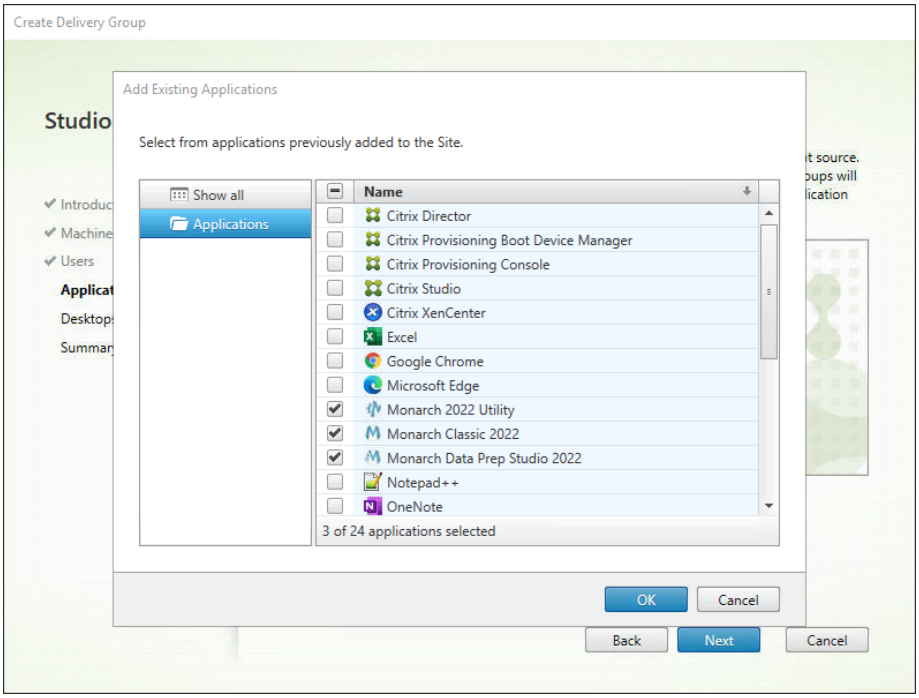


4. In the Applications screen that displays, select **Add > Existing**.

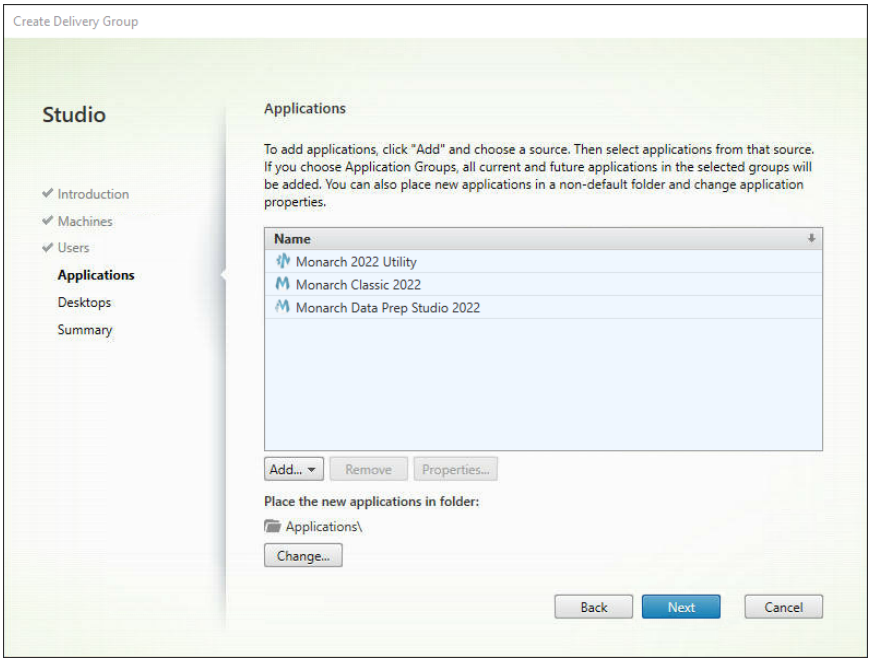


The **Add Existing Applications** dialog launches.

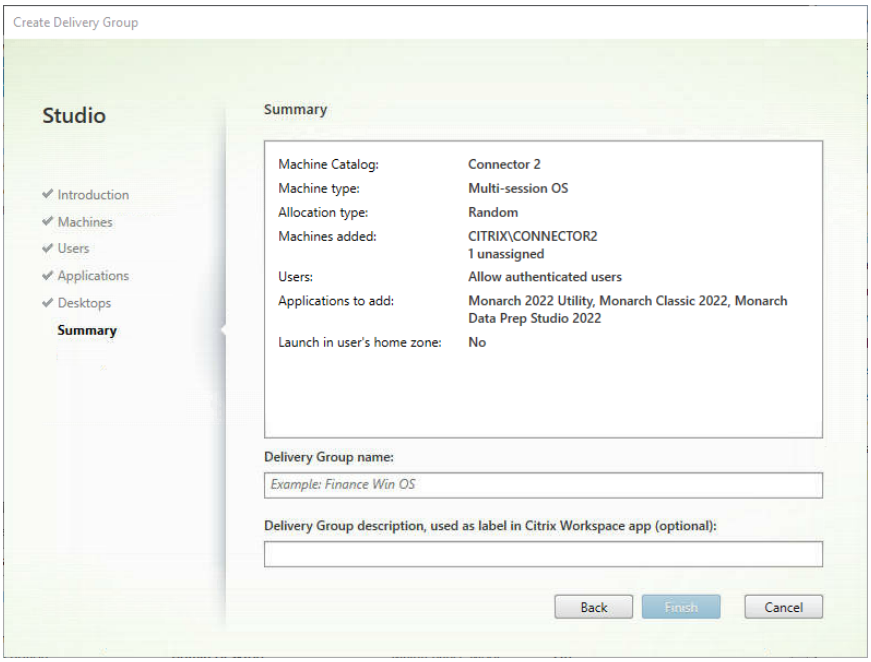
5. Check the boxes for the applications you wish to add (e.g., Monarch Classic 2022, Monarch Data Prep Studio 2022, and Monarch 2022 Utility) and then click **OK** when you are finished.



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

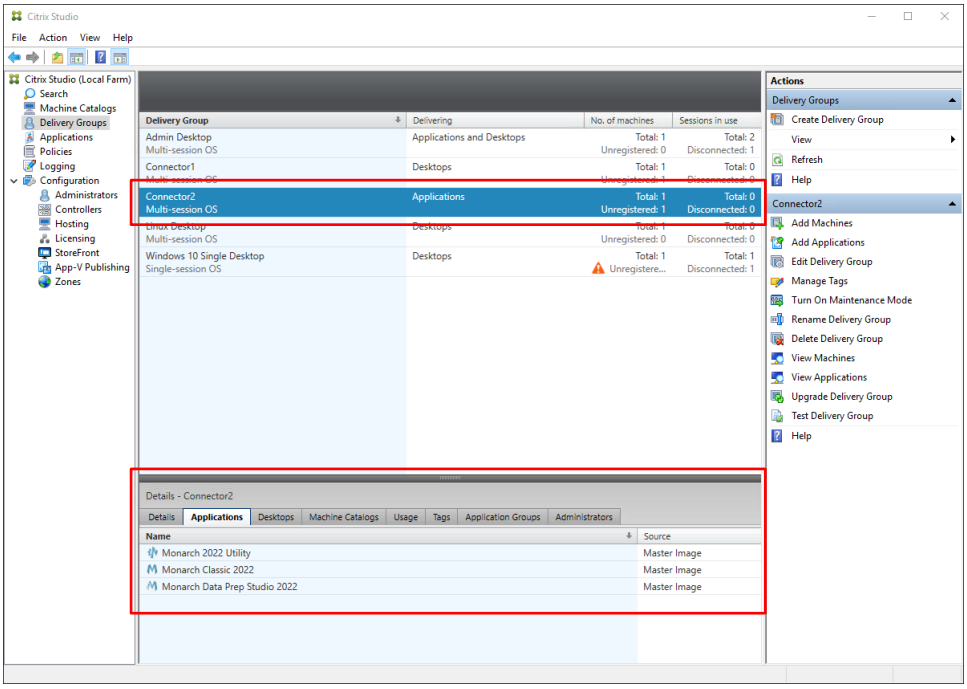


6. Click **Next** on the Desktops screen.
7. In the Summary screen, provide a name for the newly defined delivery group. You may also add a description of this group if you wish. Select **Finish** when you are done.



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

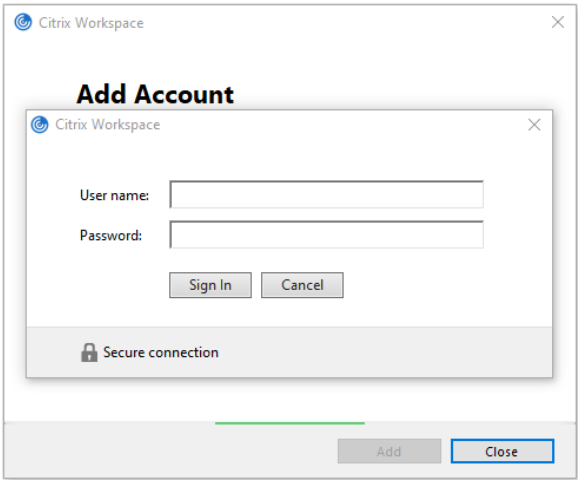
The Applications list will show a set of published applications, including Monarch.



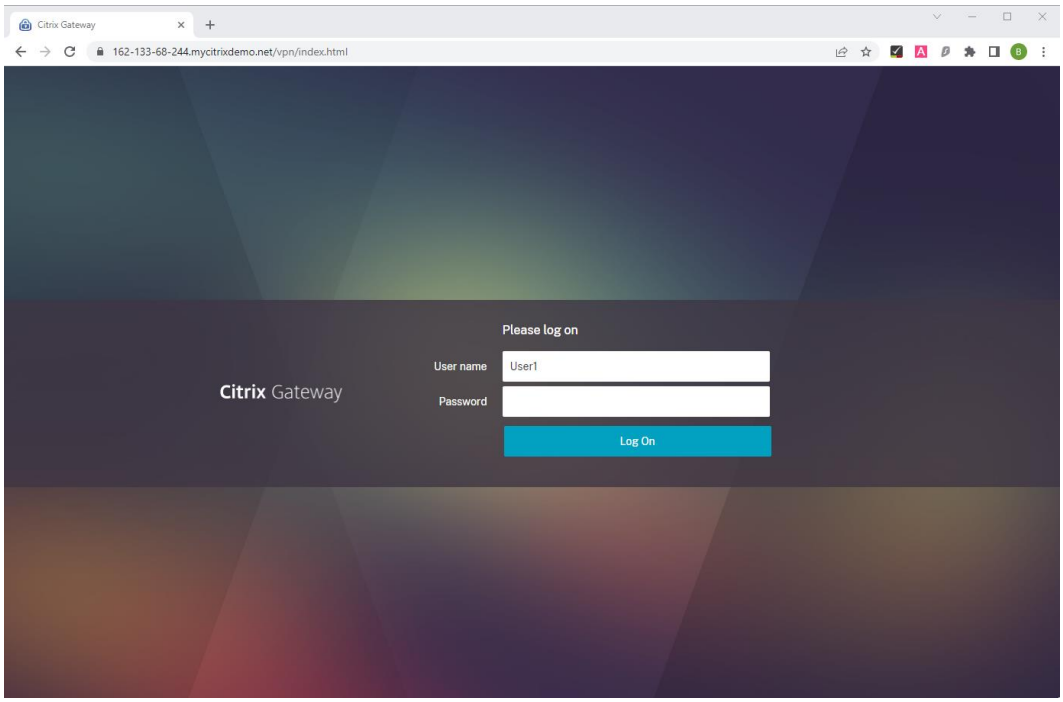
Launching the Monarch Application

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

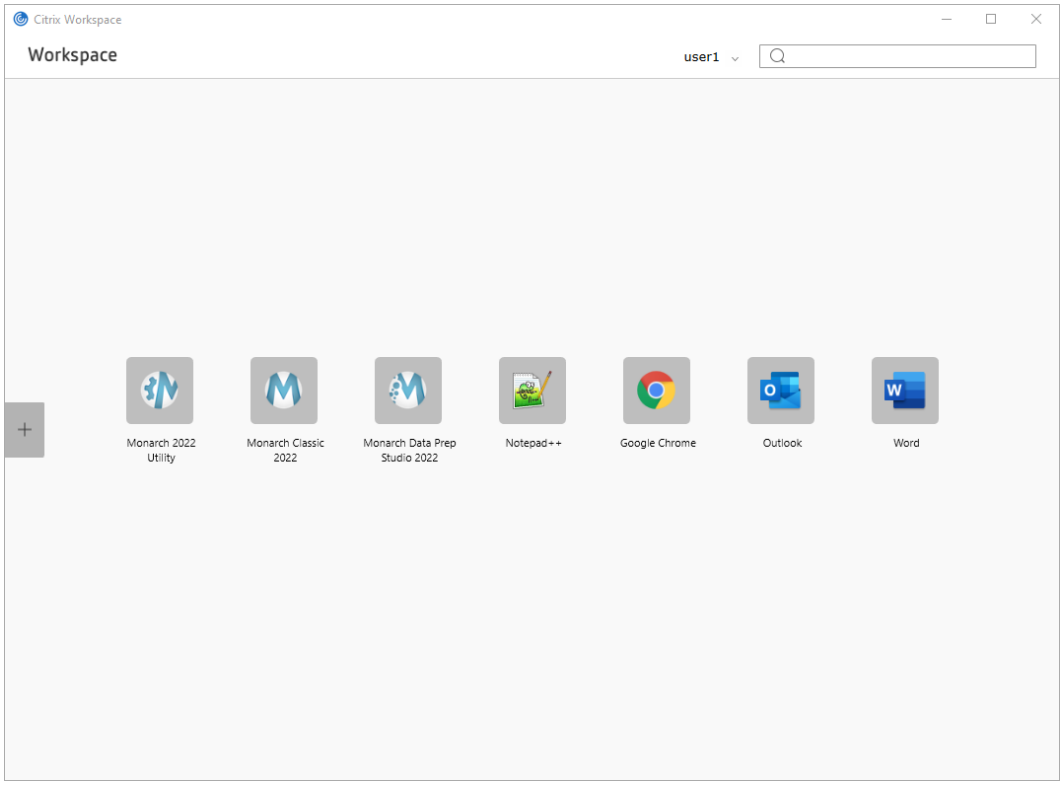


- Specifying the web URL of Citrix Receiver and logging in as usual

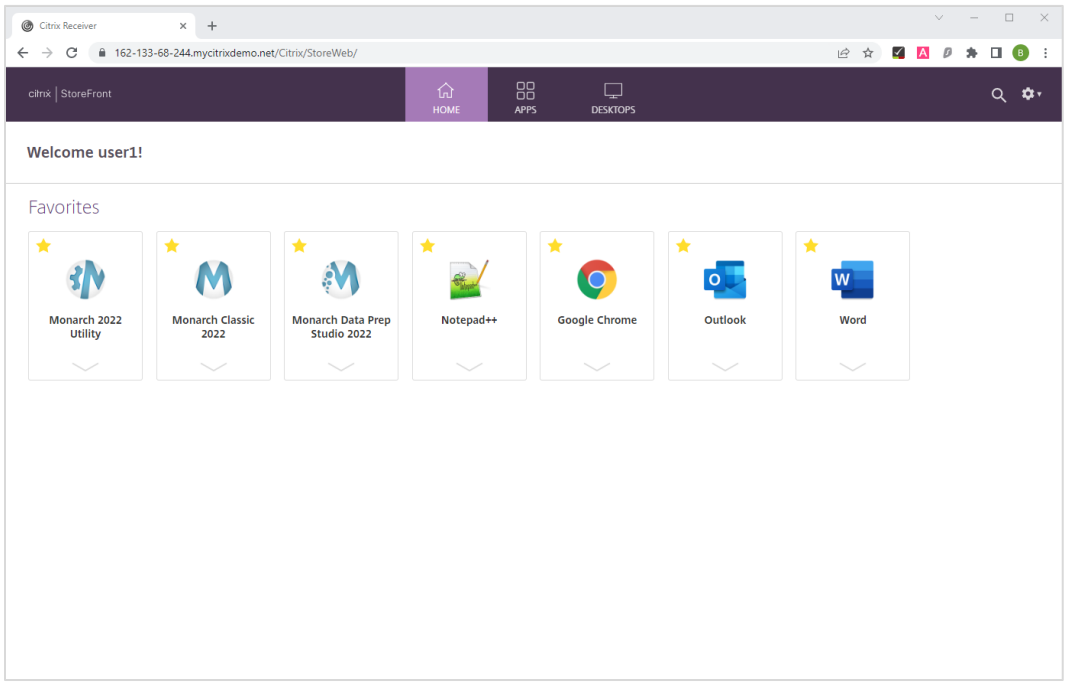


The applications available to you, including Monarch, display on the Applications screen.

In Citrix Workspace:



In Citrix Receiver:



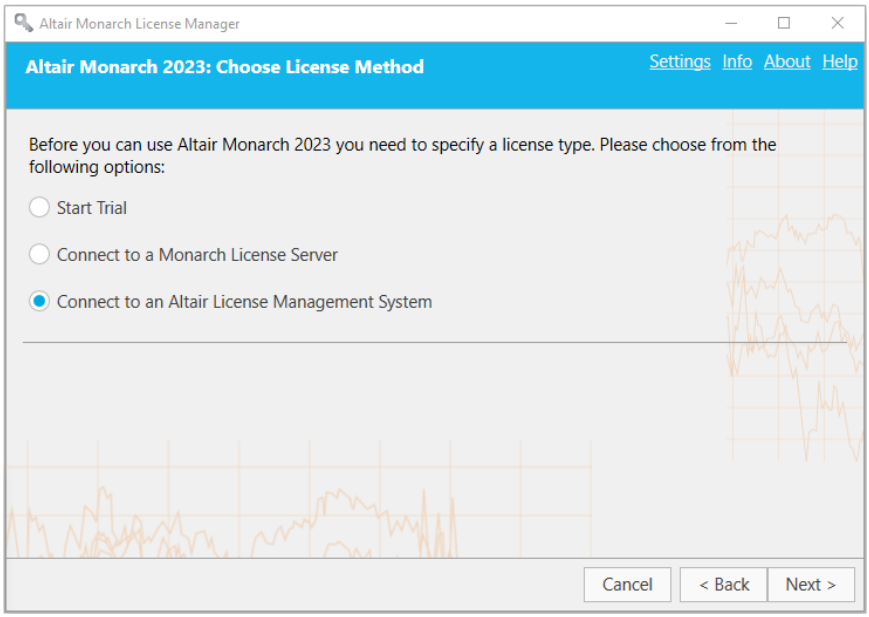
ACTIVATING MONARCH

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.



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 must be enabled 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 must be enabled before it can be used.

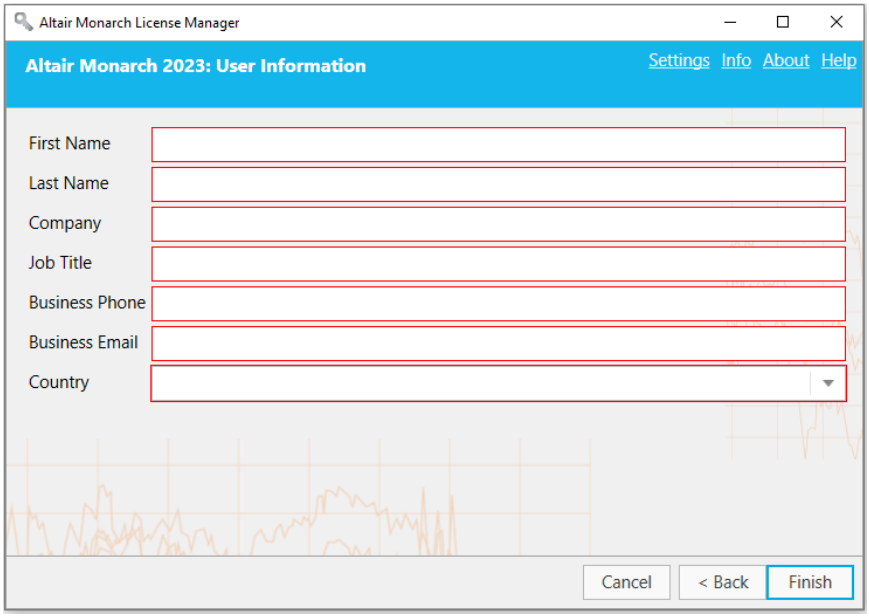
Each of these activation methods will be discussed in this guide.

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)**.

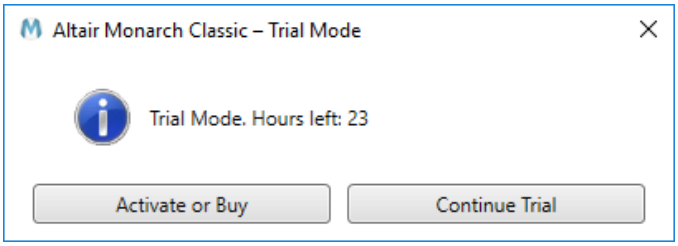
USING MONARCH IN TRIAL MODE

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:



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.,



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.

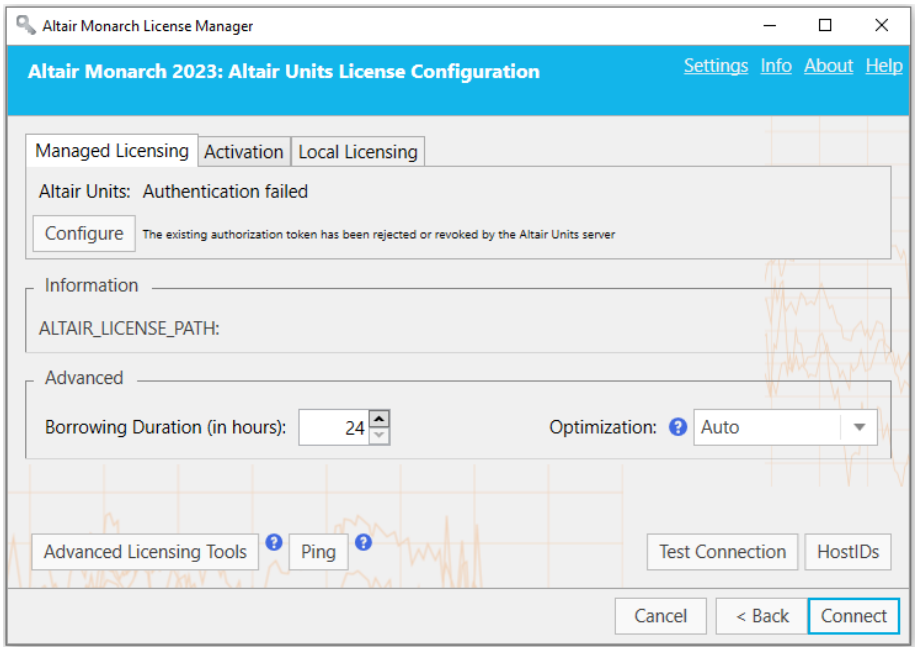
In Monarch Data Prep Studio, the number of days/hours remaining in your trial displays in the middle of the screen and persists in upper right-hand corner of the application window.

Once your trial period has expired, you must activate Monarch using any of the options described in Activation Methods. 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.

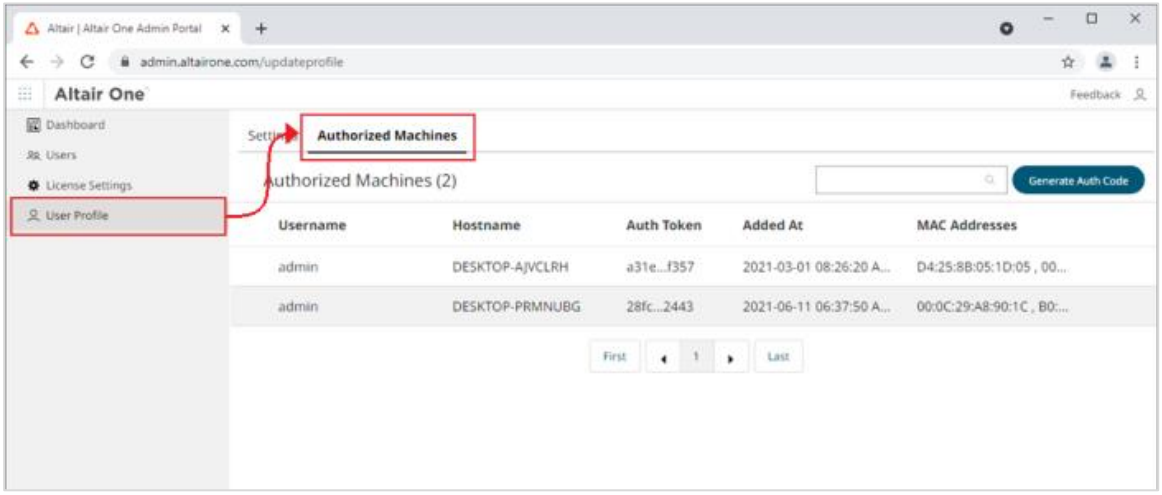


Managed Licensing

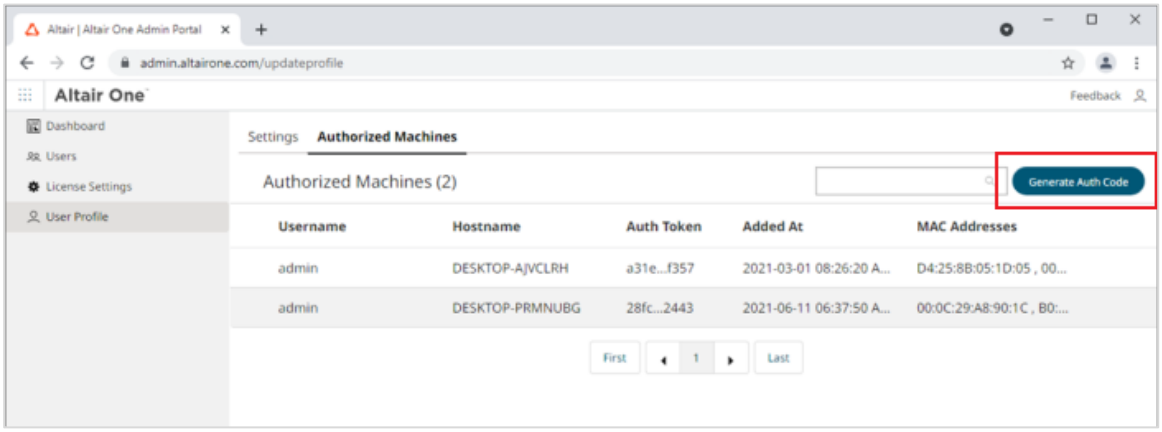
Altair Units is a cloud-based license management system that enables greater flexibility with your Altair licenses. Integrated with Altair One, Altair Units allow you to seamlessly access your Altair licenses with just an internet connection.

Steps:

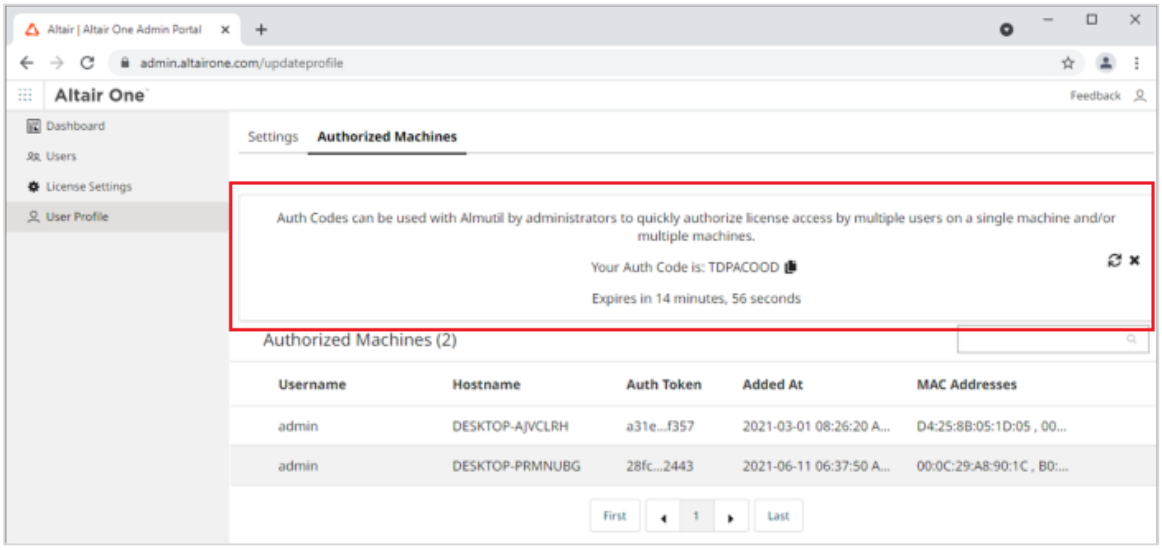
1. Launch Google Chrome and then go to the Altair One Admin Portal at https://admin.altairone.com/. Log in with your credentials.
2. Once logged in to the portal, navigate to **User Profile** > **Authorized Machines**.



3. Click Generate Auth Code.

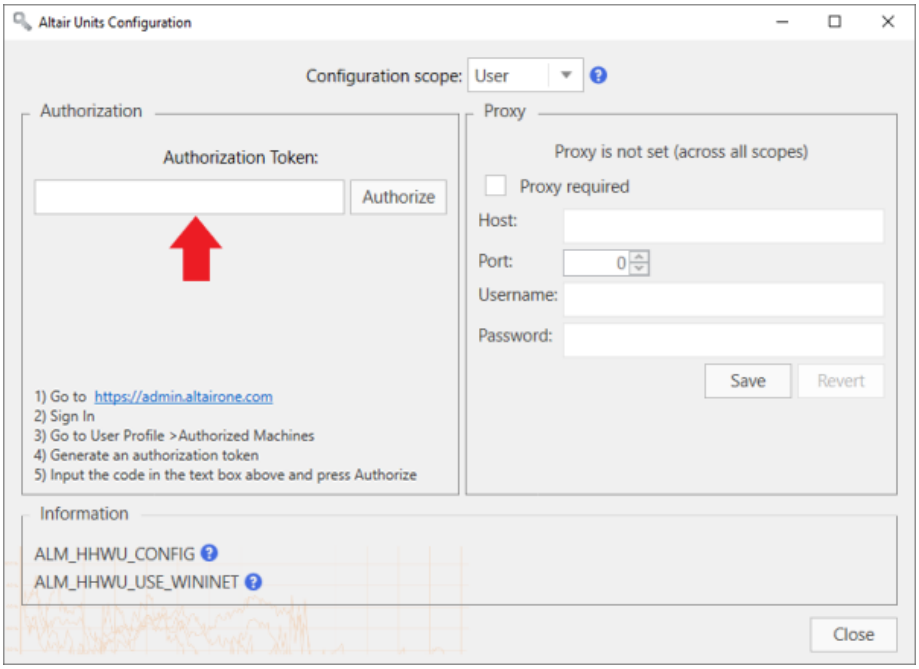


The page refreshes to display the authorization code and a countdown of time left for authorization.

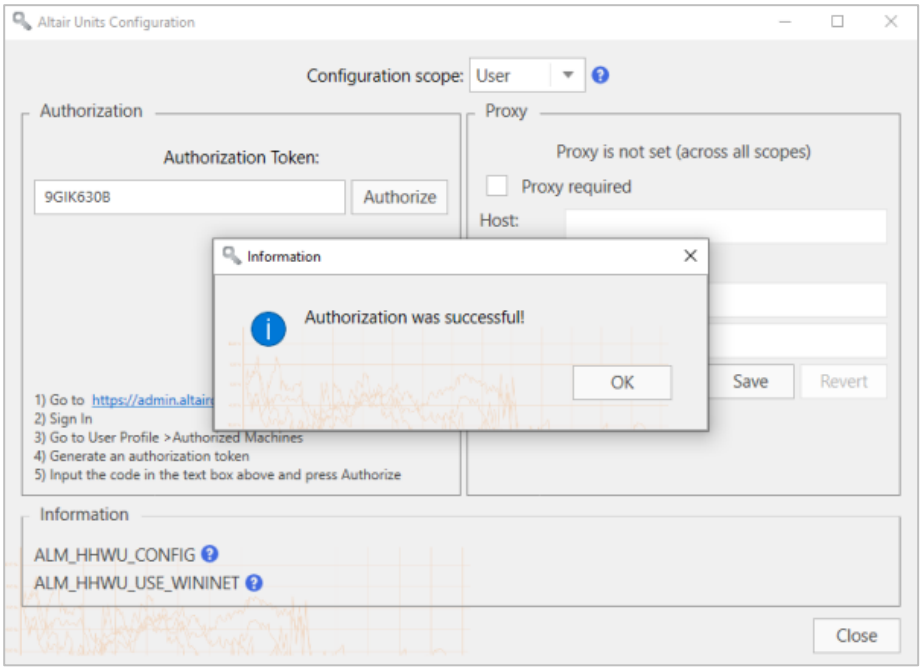


4. In the Altair Monarch License Manager, ensure that the **Managed Licensing** tab is selected in the Altair Units License Configuration screen and then click the **Configure** button.

5. Enter the **Authorization Code** you received in Step 3 into the field provided and then click **Authorize**.



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

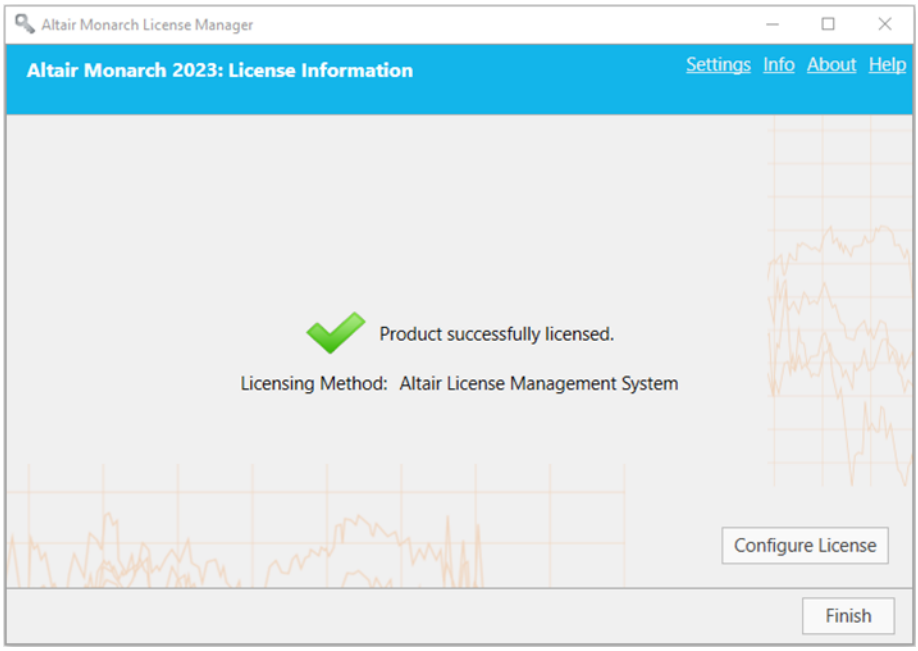


6. Click **OK** and then close the screen when you are finished.
7. If you wish to enable license checkout (i.e., allow users to “check out” or “borrow” their license so that they can work with the Monarch applications offline), enter a maximum number of hours users can check out their license into the **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.



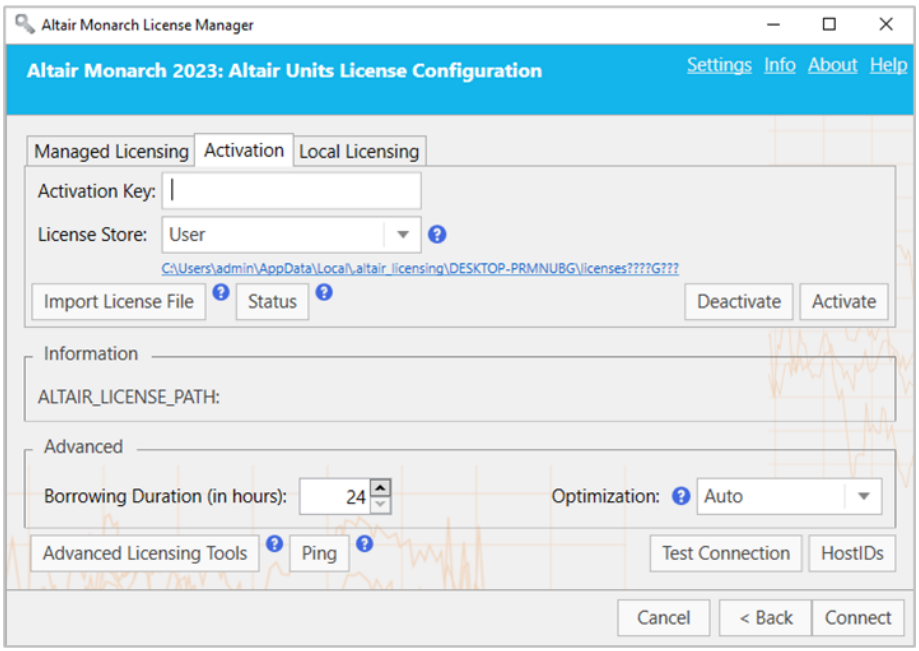
Activation Key

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**.

2. 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.



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.

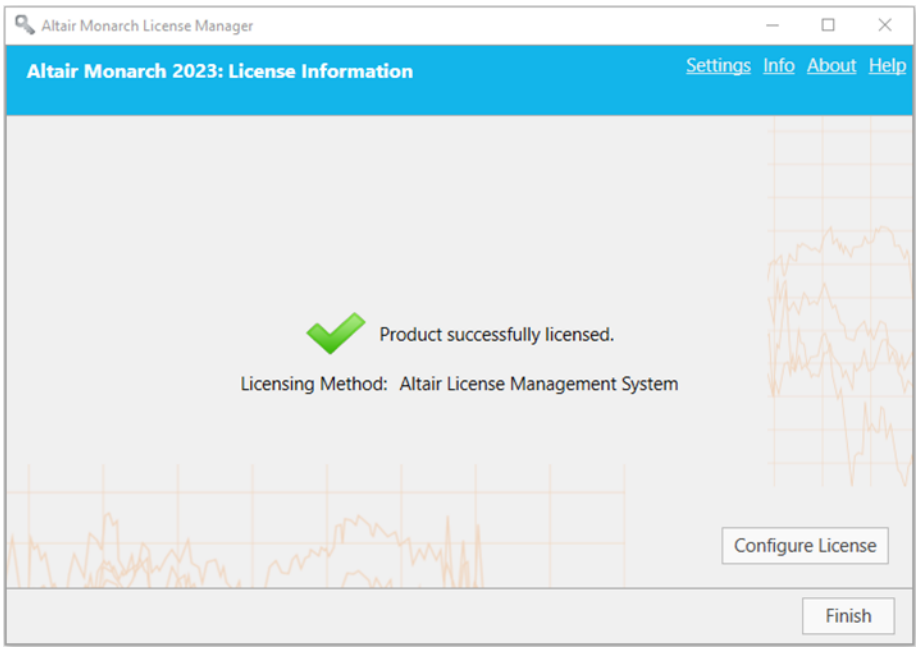
6. Choose an **Optimization** type (ideally **LMX** or **Auto**) from the options available.

7. Click Activate.

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

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

   Monarch is successfully activated.



License File

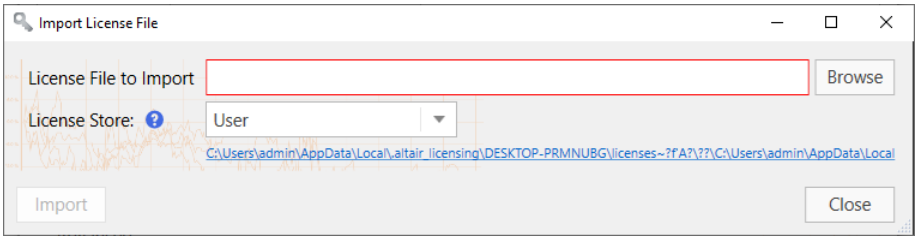
You can activate Monarch using an Altair license file if the machine in which the software was installed does not have access to an ALAS. In this case, the license file must have been generated using the HostID file created for the machine without internet access (hereafter referred to as **Machine A**) 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 here.

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.



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.

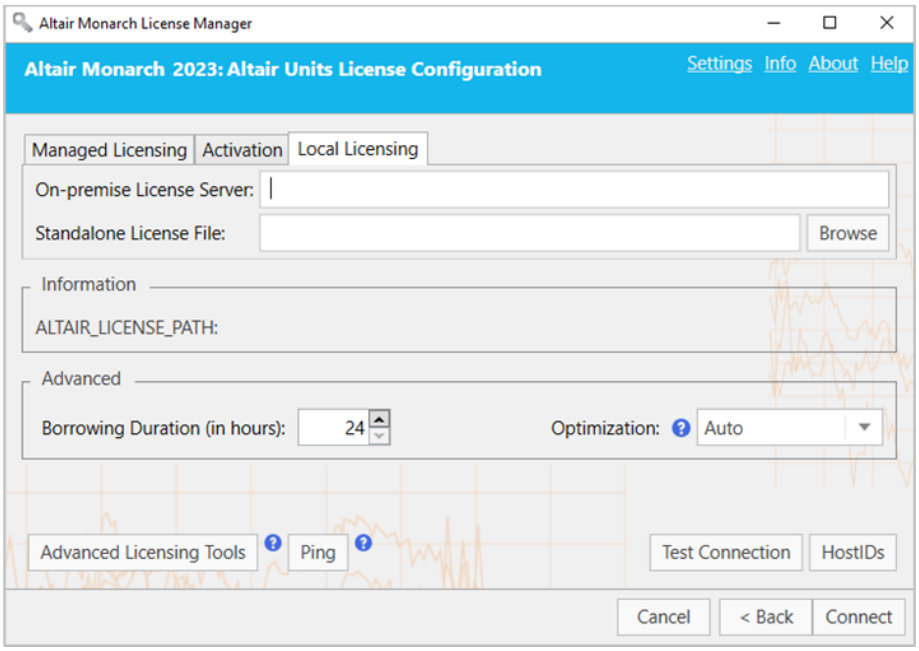
   Monarch is successfully activated.

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.



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

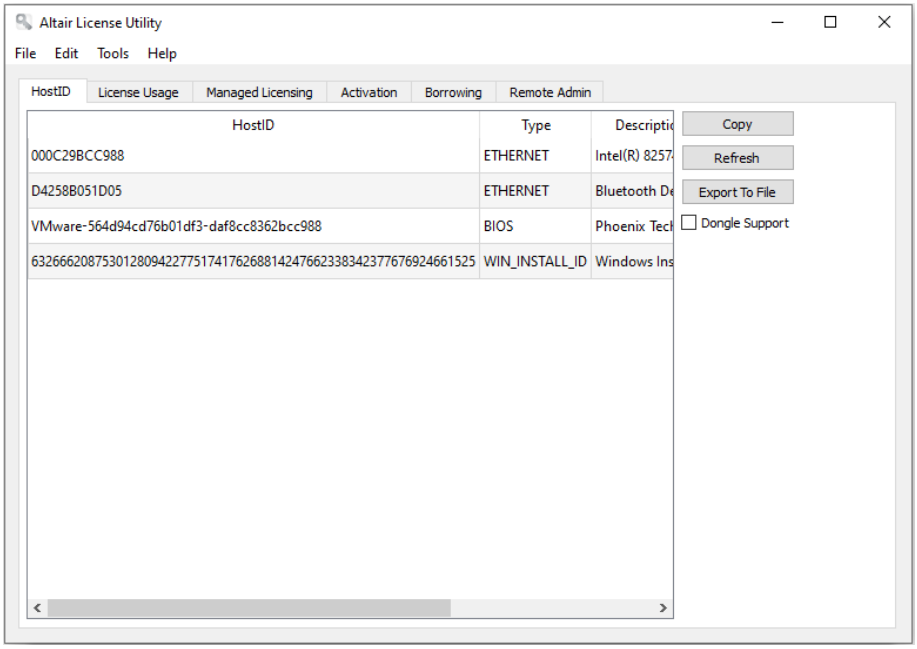
Monarch offers a “student edition” of the application, which is activated using a standalone license following manual approval. This license is provided for educational purposes to students who wish to explore the technology or need the application to work on homework assignments.

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

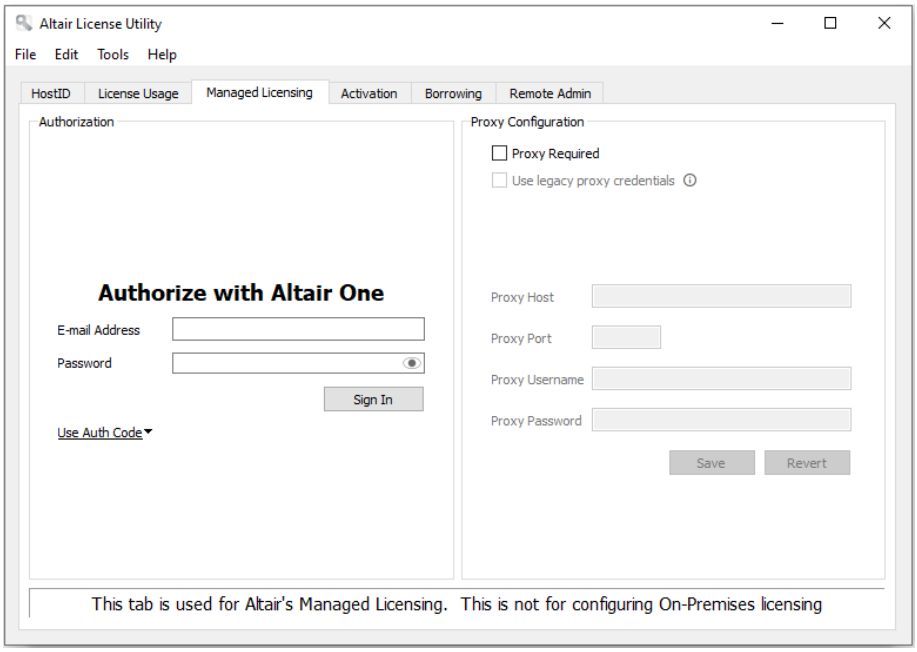
The Altair License Management system provides an alternative utility that you can use to activate Monarch. This utility is installed along with your Monarch installation, typically in C:\Program Files\Altair Monarch 2023\security, and provides comprehensive Altair licensing functionality, including the 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.



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

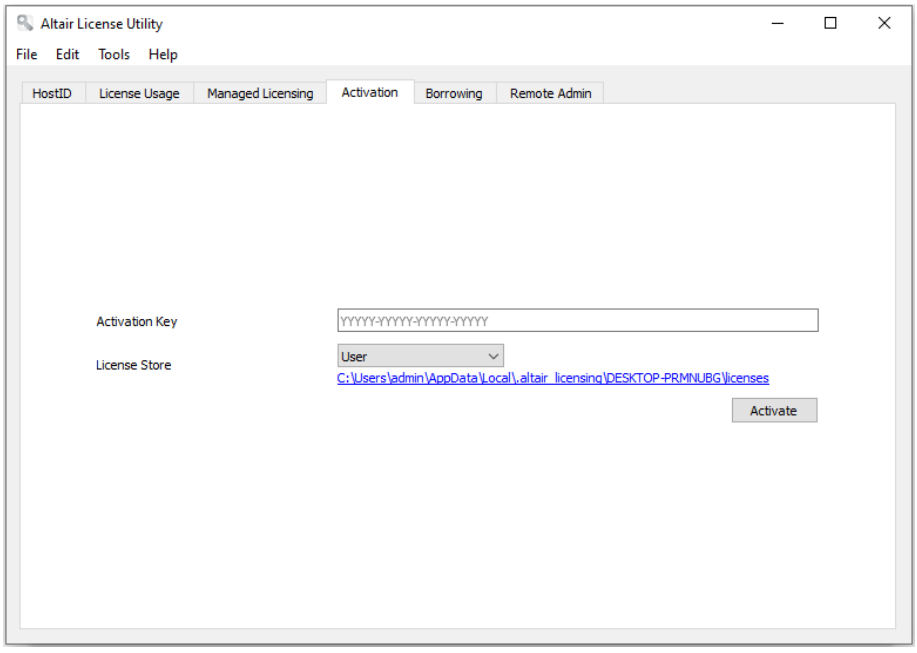
MANAGED LICENSING

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



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**.



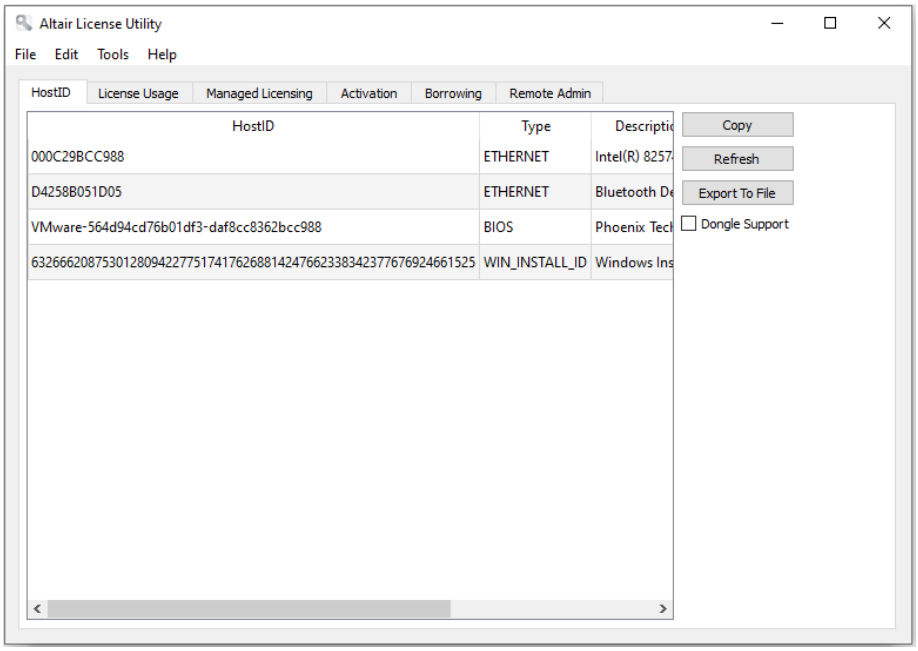
LICENSE FILE

As explained here, 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:

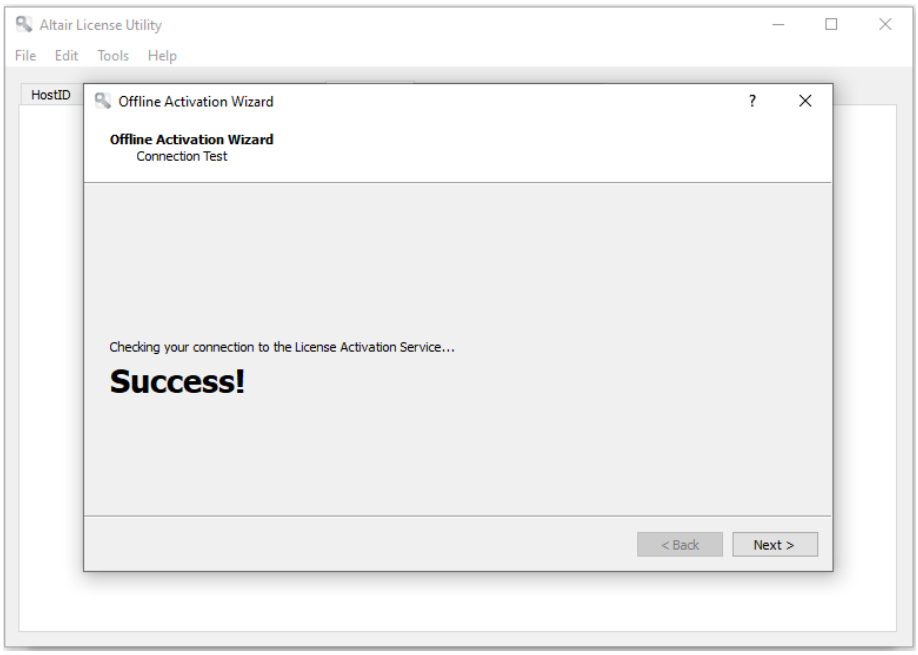
1. Generate a HostID file for **Machine A**. A HostID is a unique machine value that can be used to lock a license file to a specific host.

   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**.

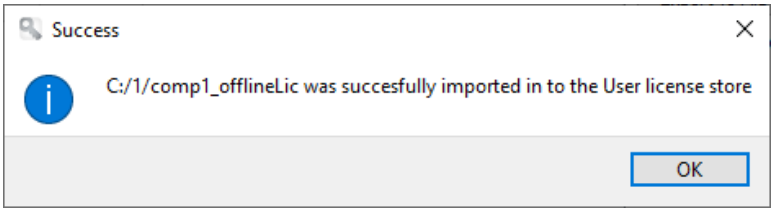


2. Generate a license file for **Machine A**.

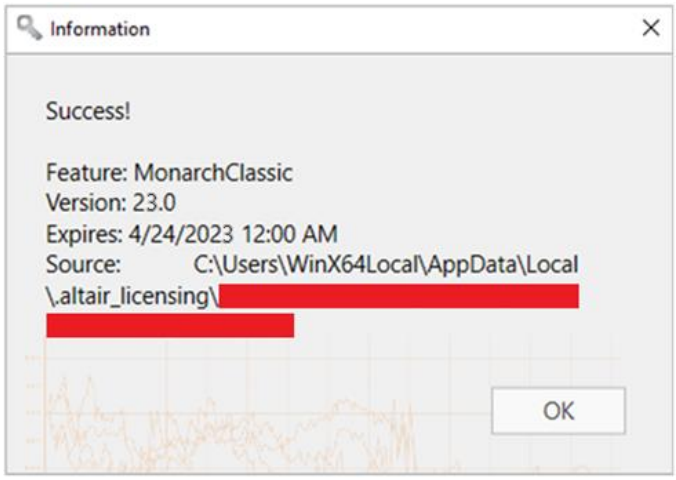
   In **Machine B**, launch the Altair License Utility and then select **Tools** > **Offline Activation Wizard**. The wizard displays, and your connection to the License Activation Service will be checked.



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.

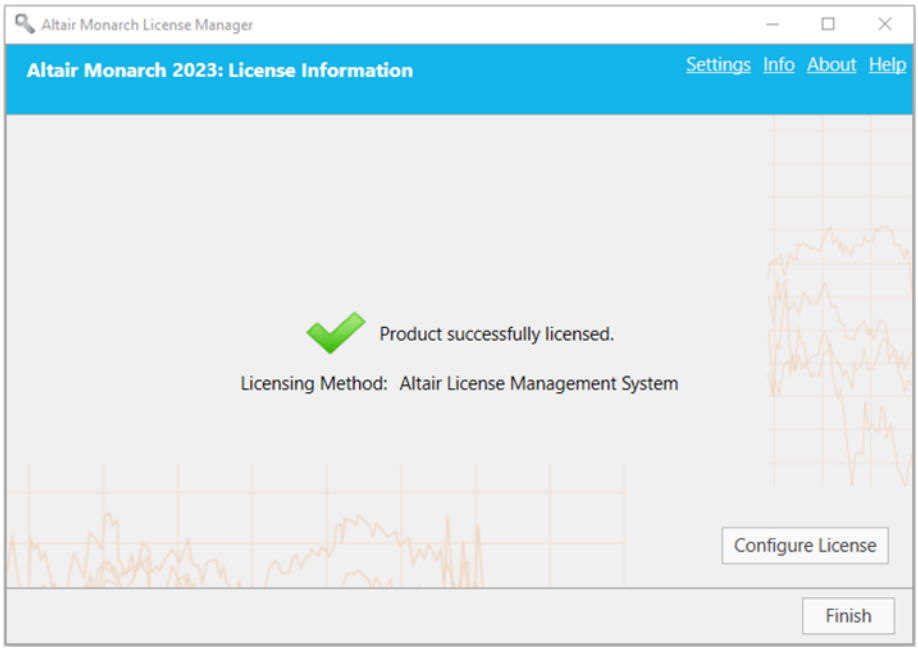


7. Using **Machine A**, launch the Monarch License Manager, select the **Connect to an Altair License Management System** option in the Choose License Method screen, and then click **Next**.
8. In the Altair Units License Configuration page, select the **Activation** tab and then click **Test Connection**.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



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

    Monarch is successfully activated.



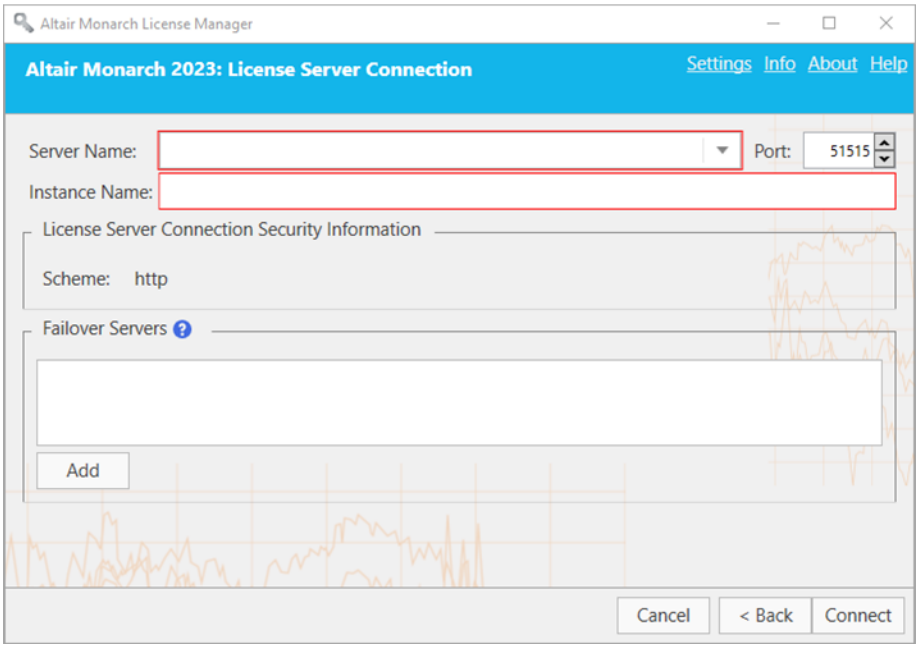
ACTIVATION USING A MONARCH LICENSE SERVER

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.

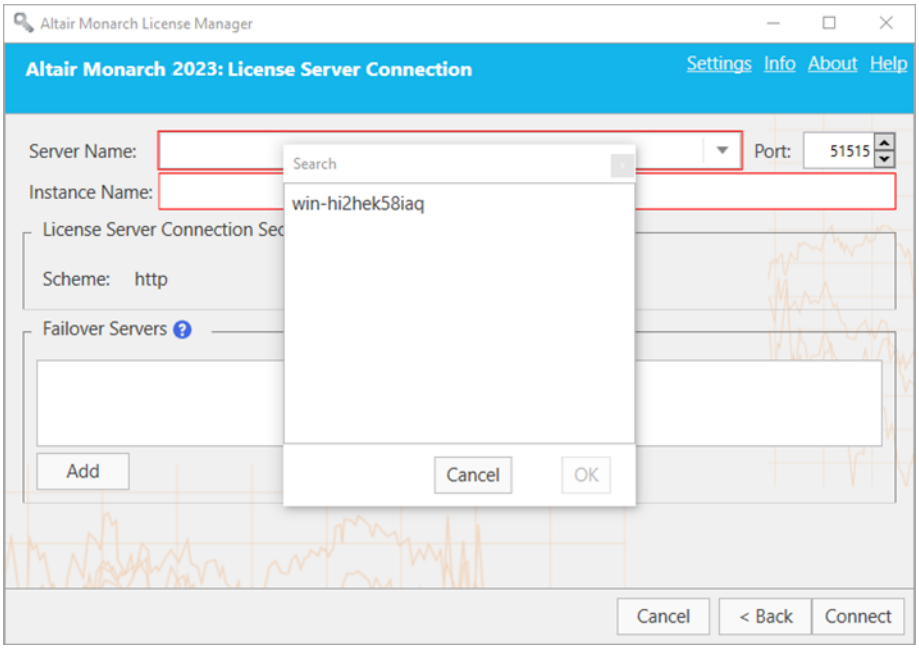
Activating Monarch via the Monarch License Server

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.



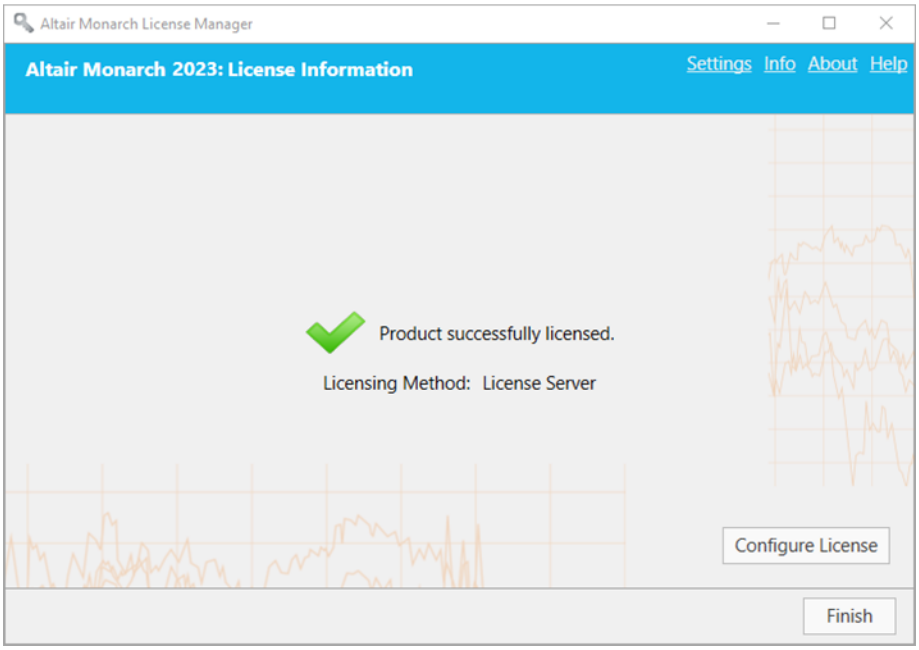
If you are unfamiliar with the name of the server to which you should connect, select the **dropdown** button located to the right of the *Server Name* field and then click **Browse for all** to launch a dialog that lists all available servers in your network.



Select the server name you wish to connect to and then click **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.



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

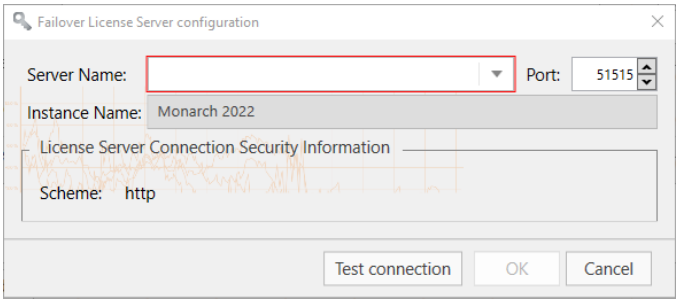
You can specify a "failover" license server that will automatically be activated and provide licensing authentication should the main server fail, for example, due to a power outage or hardware malfunction. This functionality requires two License Servers that share the same database. Your system administrator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



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.

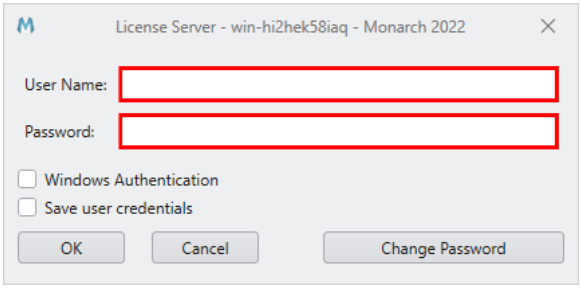
- Click on the **Edit** button to modify the details of the failback server selected.
- Click on the **Delete** button to delete the details of the selected failback server.

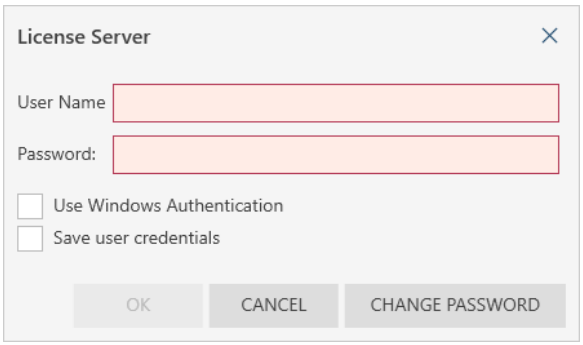
5. Click the **Connect** button.

   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.





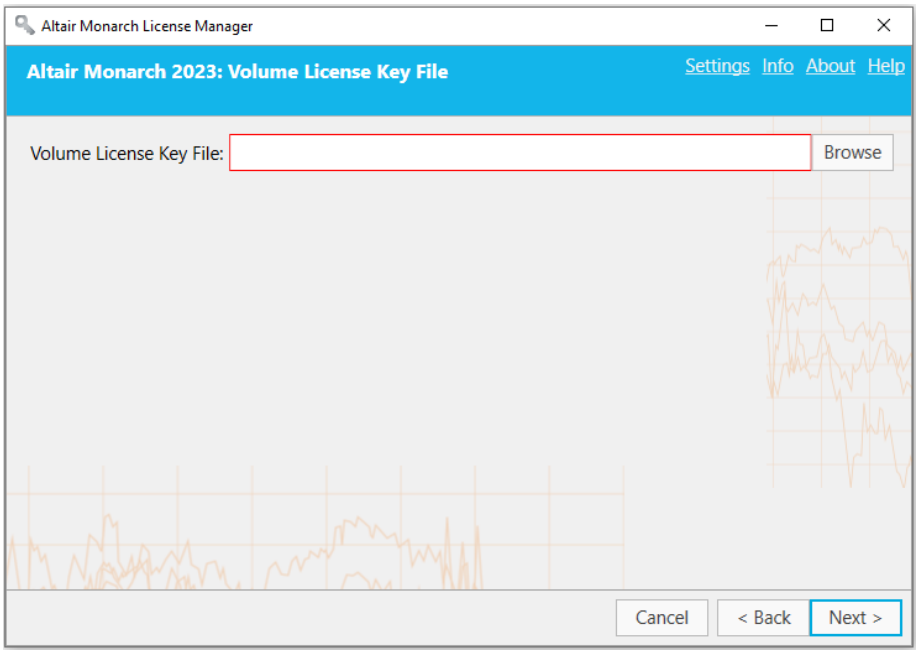
To continue using Monarch, you will need to specify the username and password of a valid user.

ACTIVATION USING A VOLUME LICENSE KEY FILE

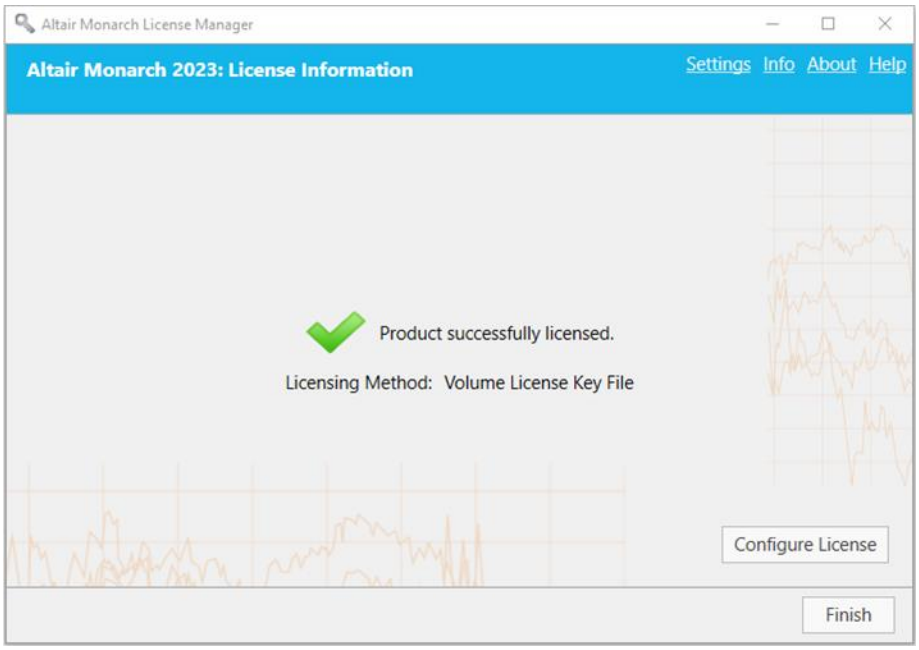
Monarch 2023 can be activated via a volume license key file.

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.



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.



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.

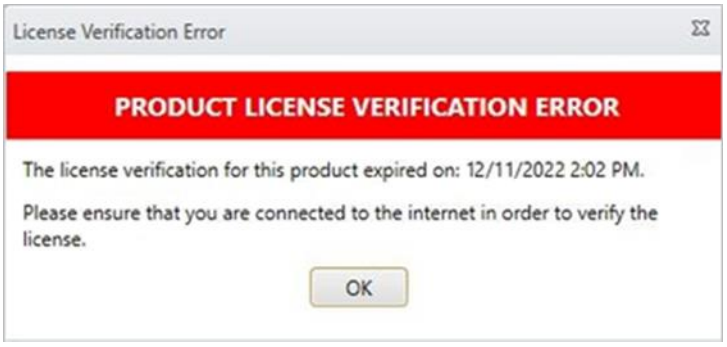
IMPORTANT: Activation codes for Monarch 2023 require an internet connection for periodic license verification.

- 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:

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:



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

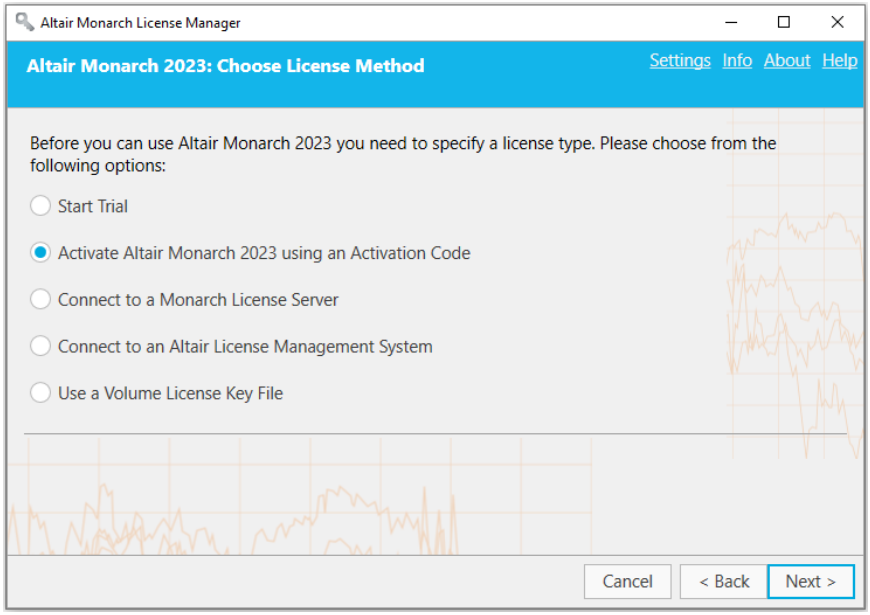
If an internet connection is not available, contact Altair Support via the support portal, chat, or phone.

Activating Monarch Online

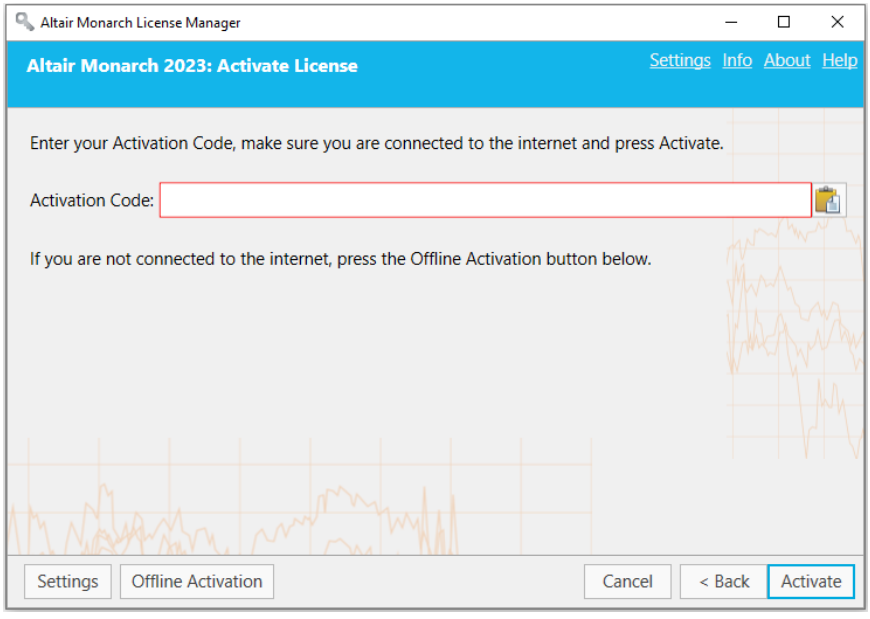
Steps:

1. Launch the Altair Monarch License Manager.

   The License Manager displays.

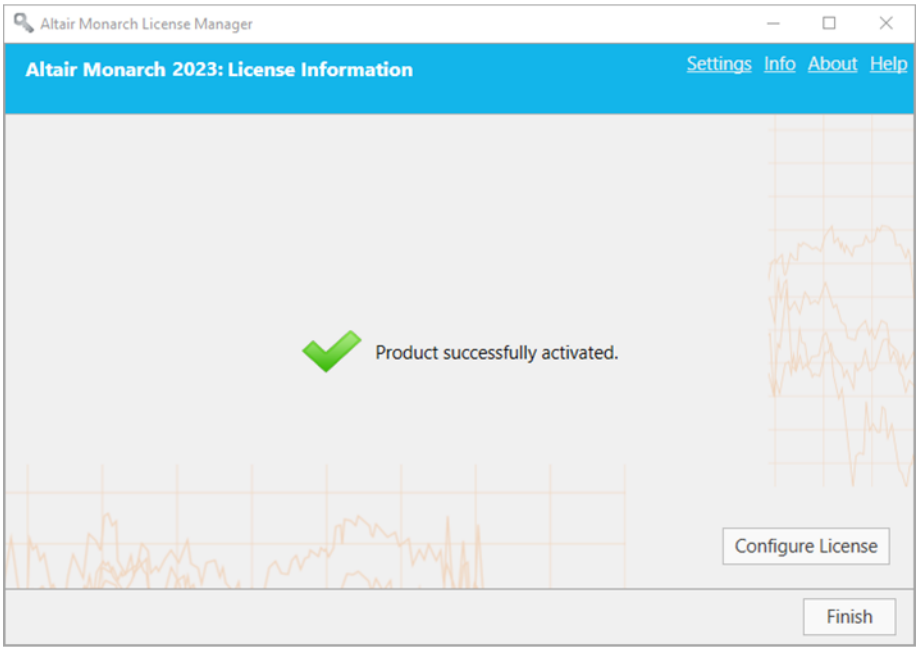


2. From the *License Method* screen, ensure that the **Activate Altair Monarch 2023 using an Activation Code** button is selected and then click **Next**. The *Activate License* screen displays.



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

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.

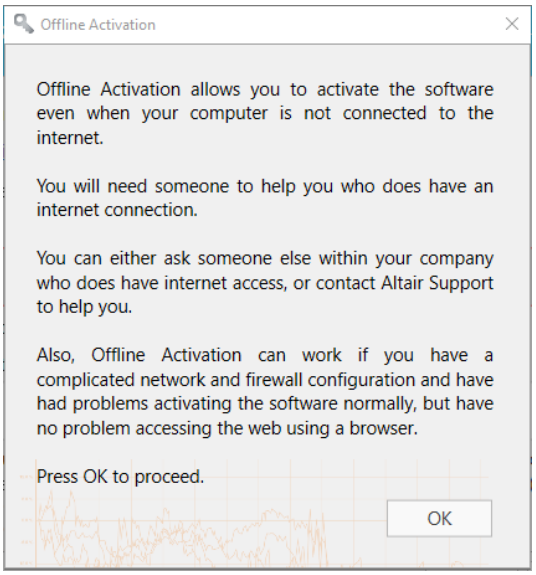
   You may now run and use Monarch.

Activating Monarch Offline

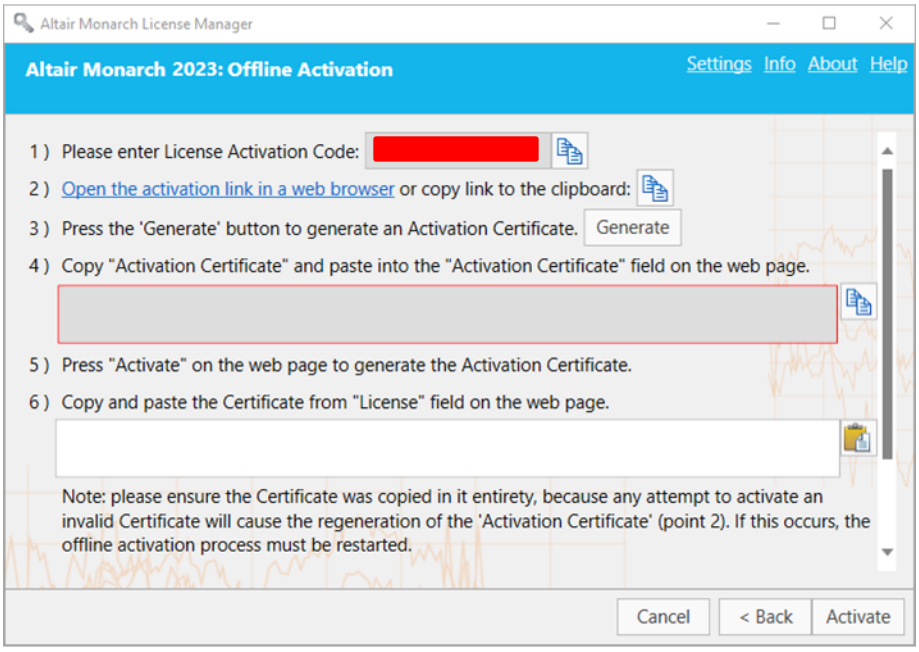
In cases where reliable internet is unavailable, you may activate Monarch offline. Using this method, you will need to enter information to and from the Activation dialog boxes and Trusted Activation Center on the web. You will also need the assistance of your systems administrator or Altair Support.

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.



4. With your systems administrator or Altair Support, follow the instructions provided in this screen to manually update your Monarch installation.

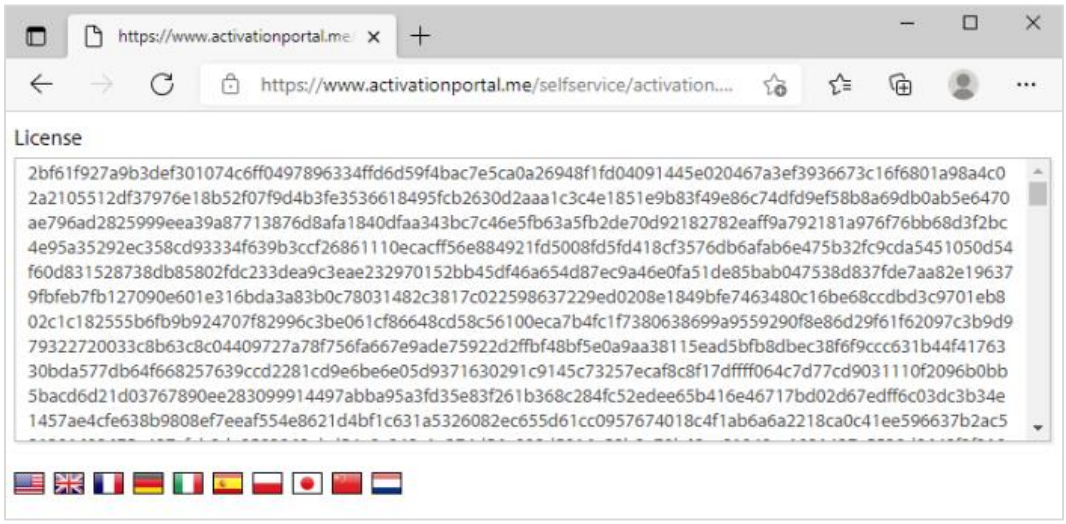
   4.1 Click the activation link in Step 2 of the screen to launch the Activation window on your browser.

   4.2 Click **Generate**.

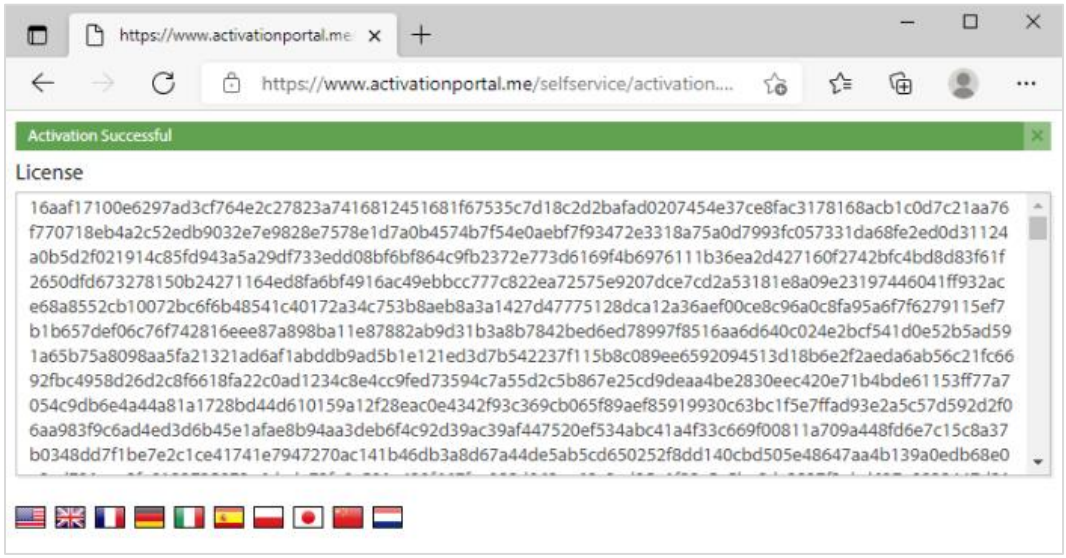
   An Activation Certificate displays in the field below Step 4 in the Offline Activation screen.

   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.

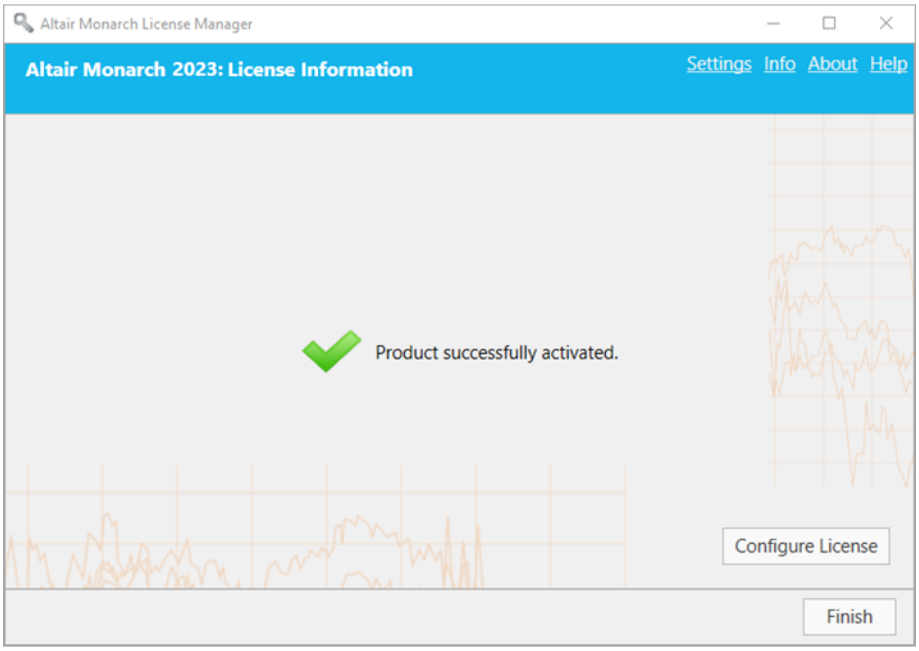


A license is generated.



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.

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

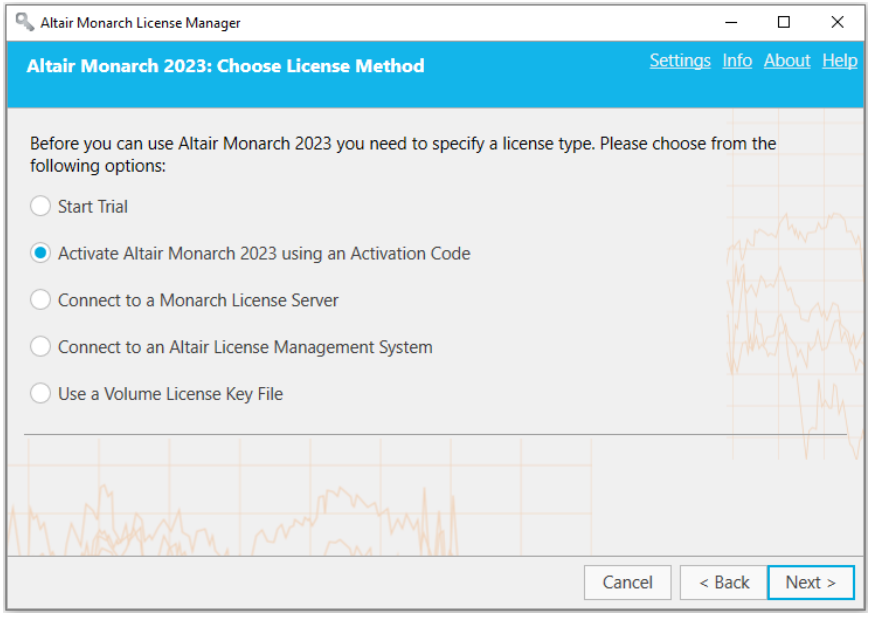
dasupport@altair.com

Configuring Proxy Server Settings

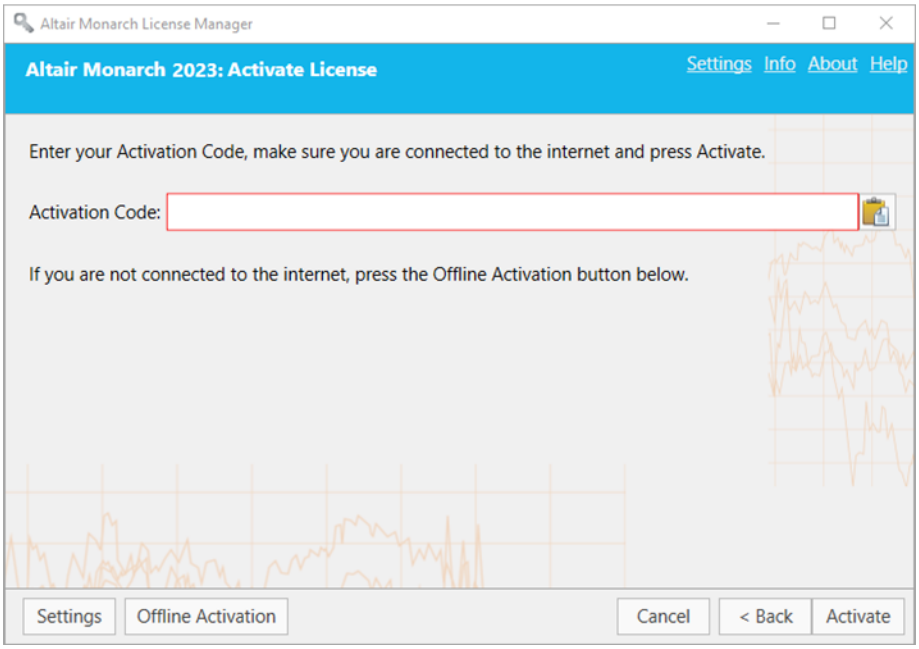
If you are using a proxy server to connect to the Internet, you will first need to set up License Manager to use the correct proxy server. Otherwise, skip this step.

Steps:

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

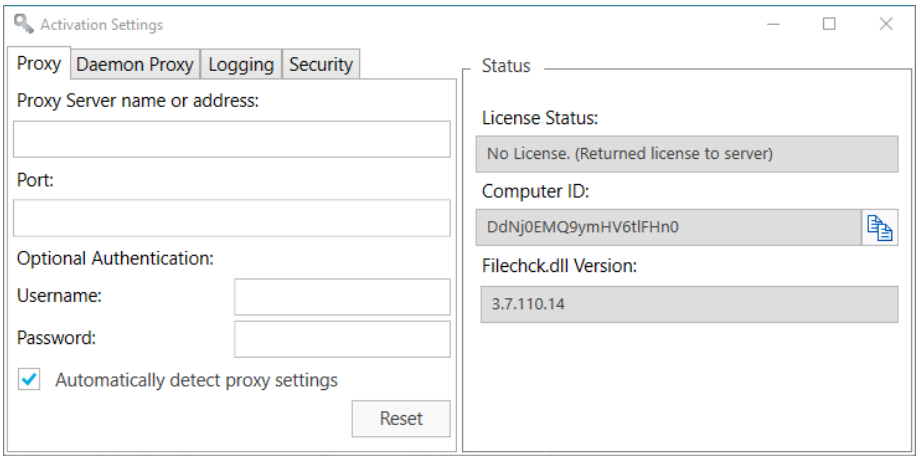


2. Ensure that the **Activate Altair Monarch 2023 using an Activation Code** button is selected and then click **Next**. The *Activate License* screen displays.



3. Select **Settings** to configure proxy settings.

   The *Activation Settings* dialog displays.



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

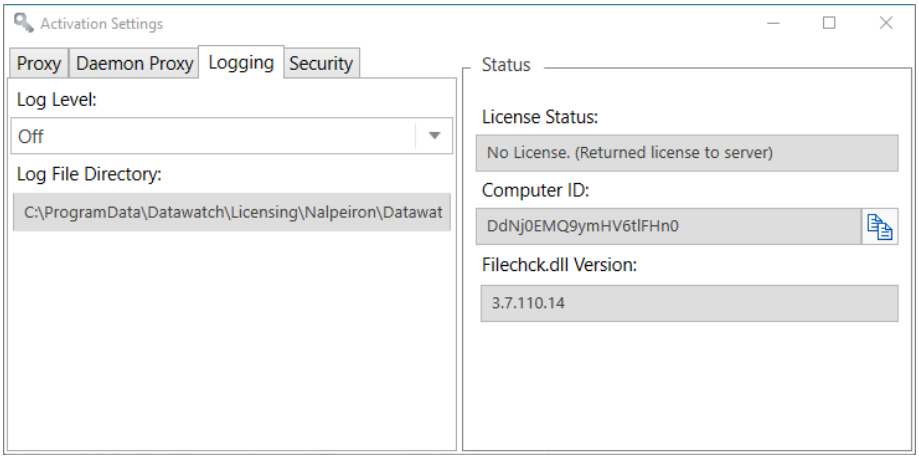
   Now you are ready to activate Monarch.

Specifying Logging Levels

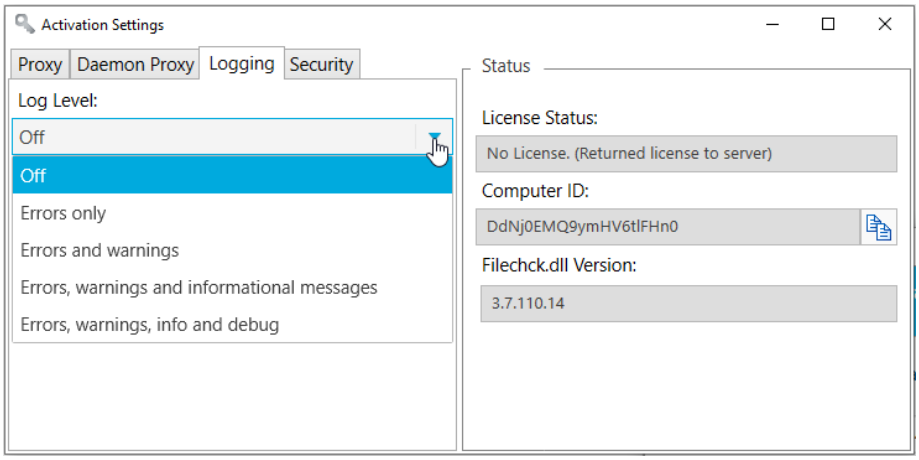
Log files for Monarch License Manager can usually be found in C:\ProgramData\Datawatch\Licensing\Nalpeiron\Datawatch Monarch 19. You can change the amount of information provided in the log files via the Logging tab of the Activation Settings window.

Steps:

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



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



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

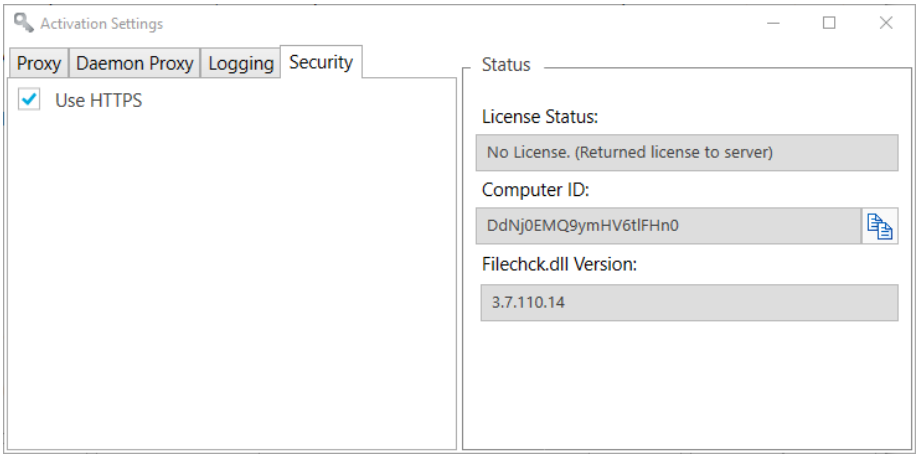
You must restart the application for the settings specified in the Settings window activation come into effect.

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.



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:

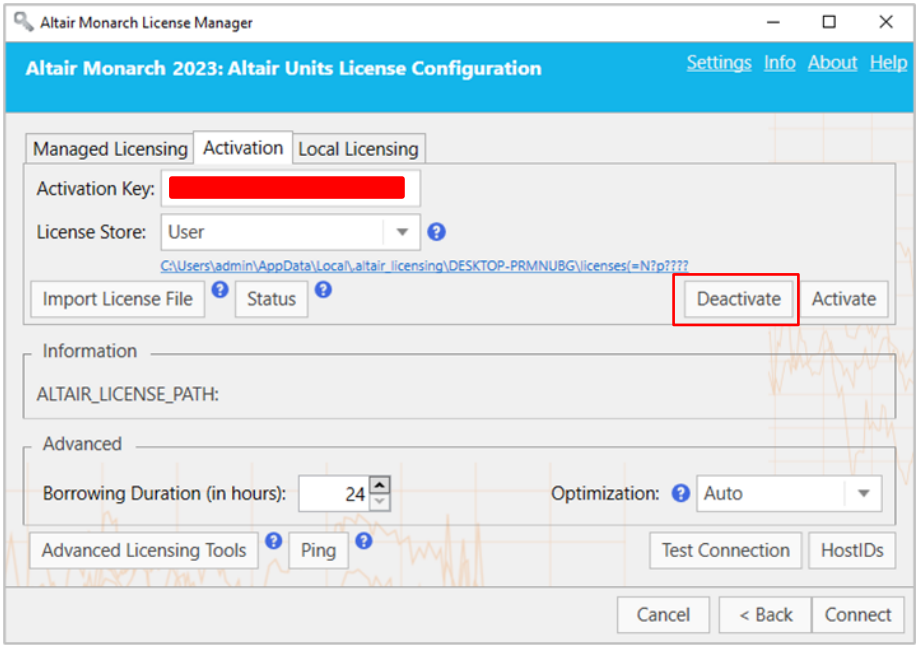
- Deactivate Monarch using the Altair License Management System
- Use the built-in License Manager that is installed together with Monarch
- Deactivate over the website
- Phone or e-mail Altair Support

DEACTIVATING MONARCH USING THE ALTAIR LICENSE MANAGEMENT SYSTEM

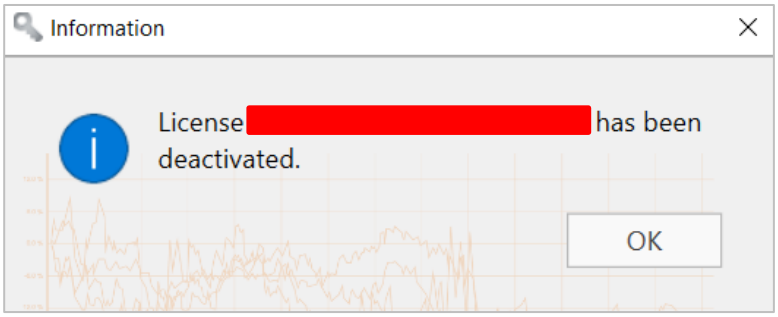
If you activated your copy of Monarch using an Altair Activation Key, you can deactivate your Activation Key via the Altair License Management System.

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**.



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

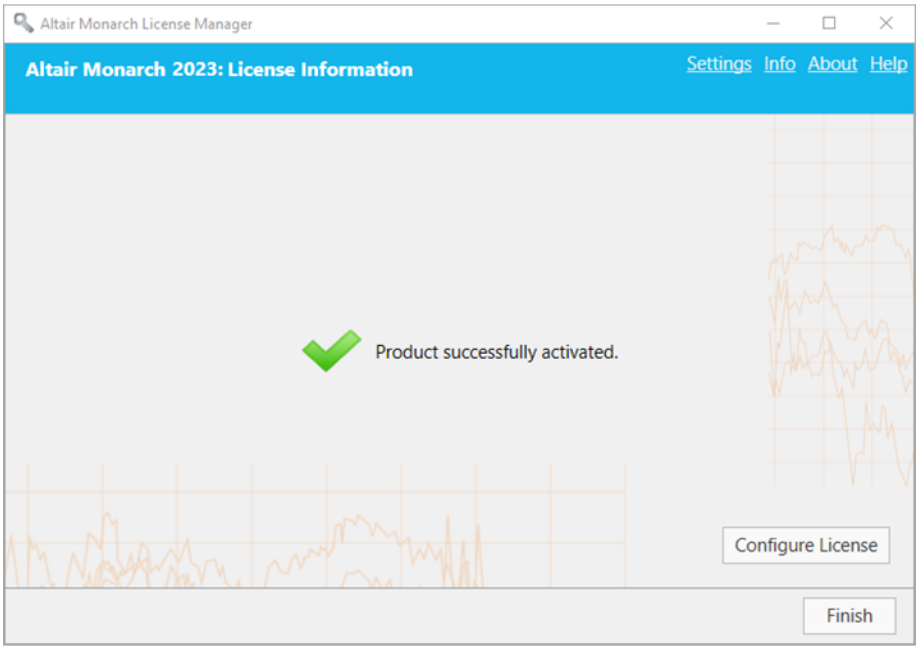


DEACTIVATING MONARCH ONLINE

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 e-mail Altair Support.

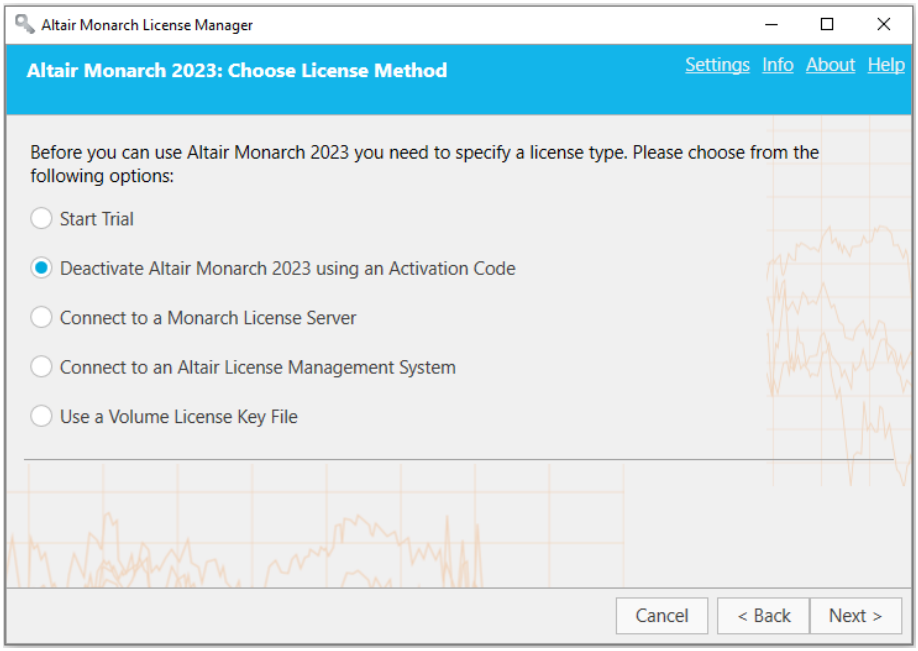
Steps:

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

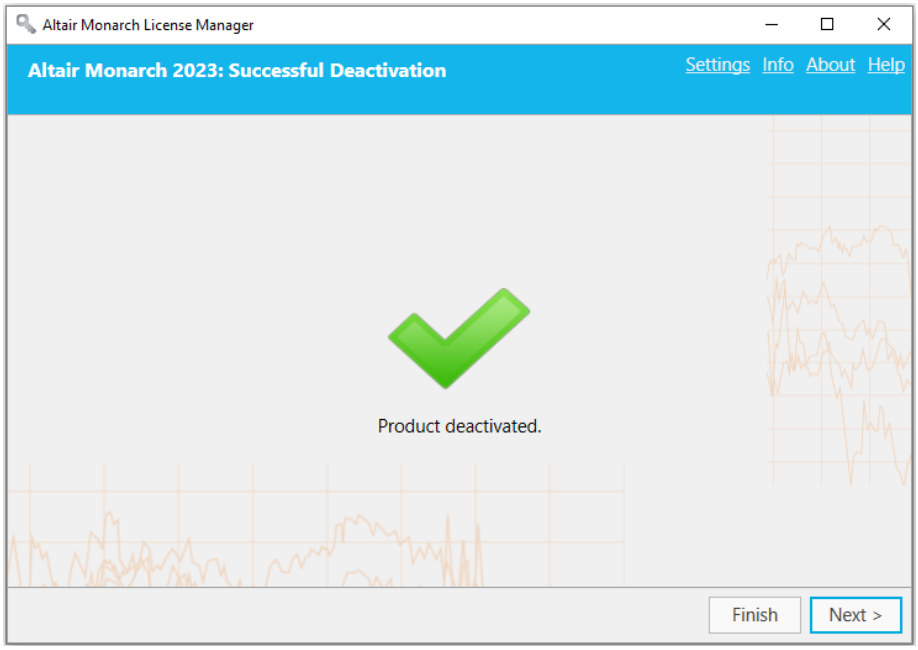


3. Click the **Configure License** button.

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



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.

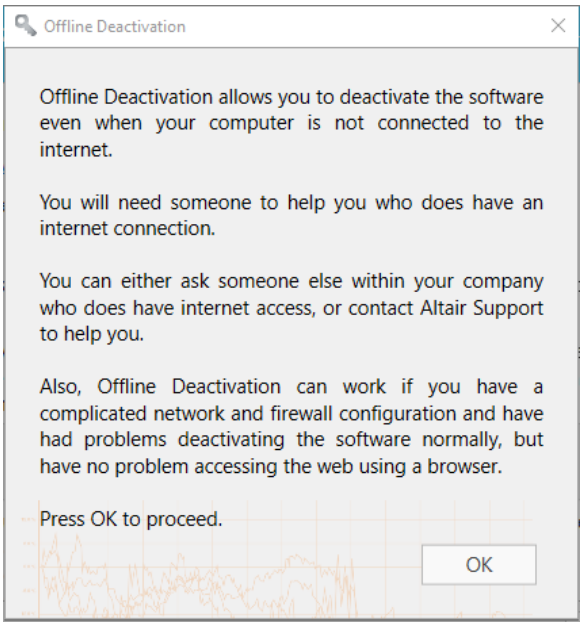


DEACTIVATING MONARCH OFFLINE

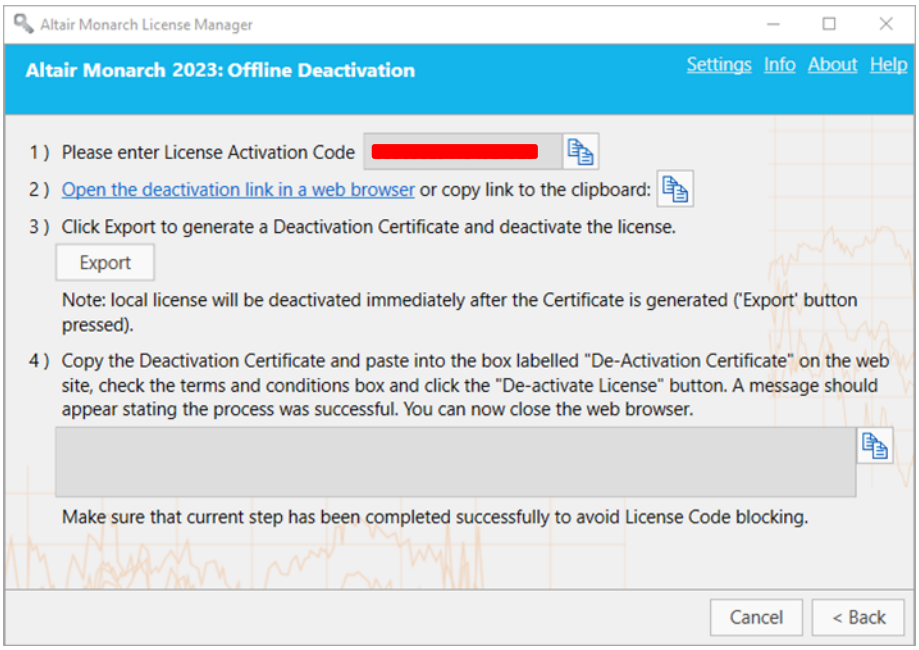
When deactivating Monarch offline, you will need the assistance of your systems administrator or Altair Support.

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.



3. With your systems administrator or Altair Support, follow the instructions provided in this screen to manually deactivate your Monarch installation.

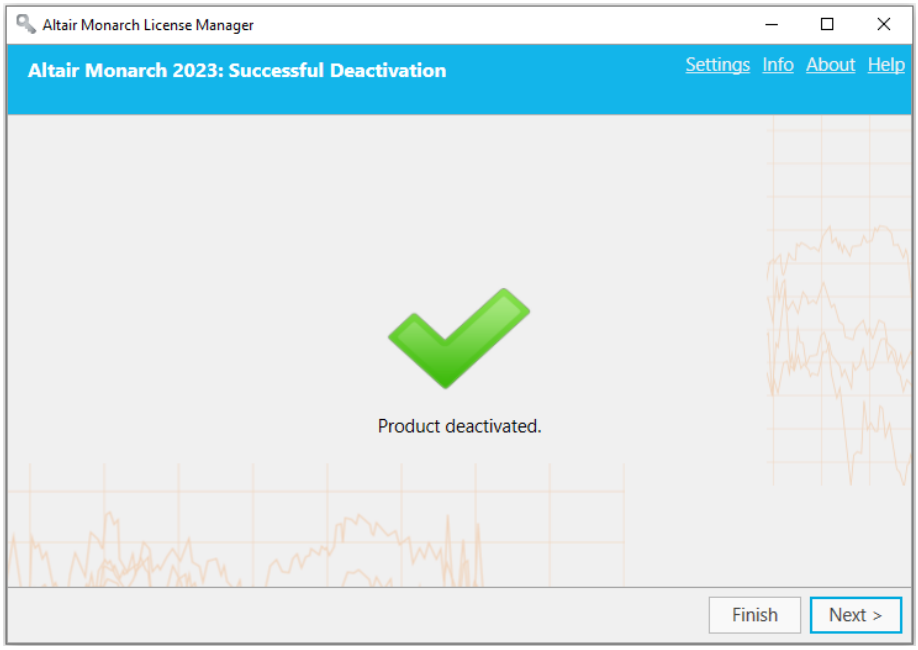
    3.1 Open the **deactivation page** of the activation website by clicking the link provided in Step 2 of the Offline Deactivation screen.

    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

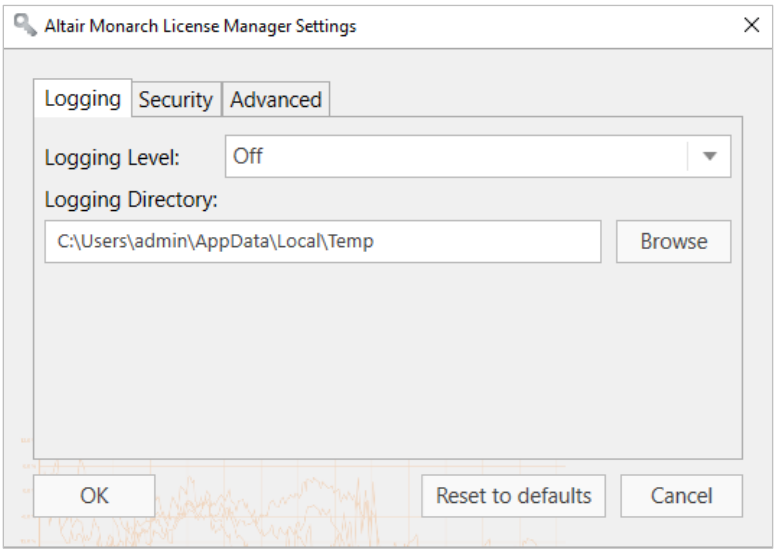
dasupport@altair.com

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 right-hand corner of the License Manager.

The *License Manager Settings* dialog displays.



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

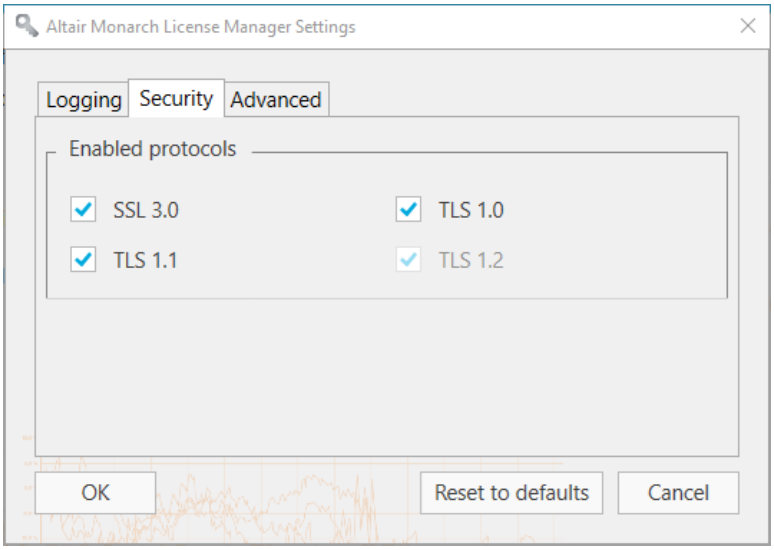
Value	Description
Off	Logs no events.
Error	Logs all exceptions.
Warning	Logs events that have occurred or may occur and cause an otherwise normally running application to malfunction.
Information	Logs events indicating successful application execution regardless of whether the application is working 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.



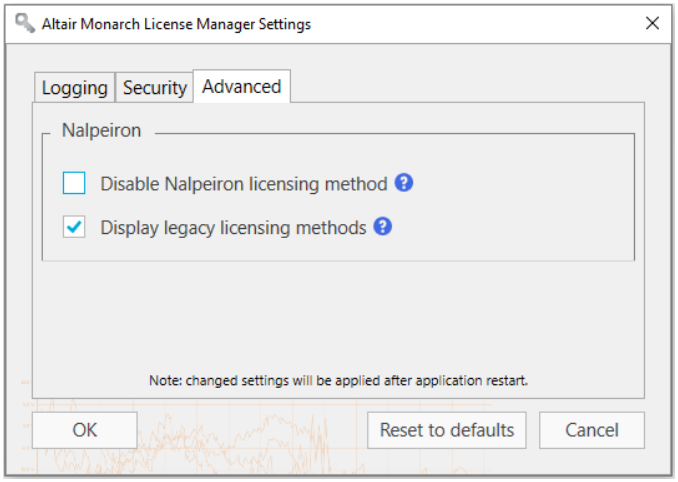
By default, all protocols are enabled. Uncheck the boxes to the left of the security protocols you with to disable. Note that TLS1.2 must be enabled to successfully register trial user information.

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

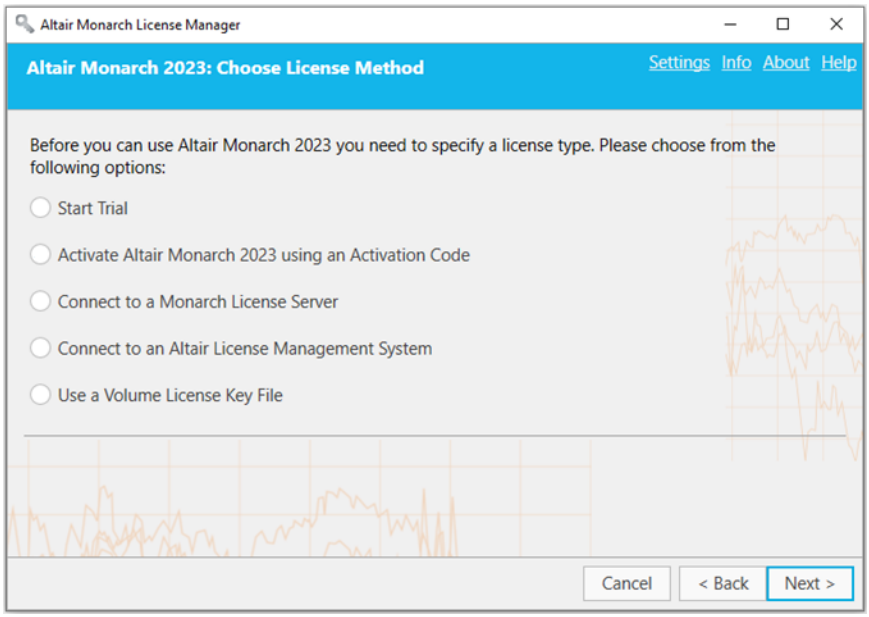
The default licensing options for Monarch are an Altair License Management System and Monarch License Server. If you wish to enable legacy licensing options (i.e., activation code and volume license key file), click **Settings** on the upper right-hand corner of the License Manager and then select the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

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



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

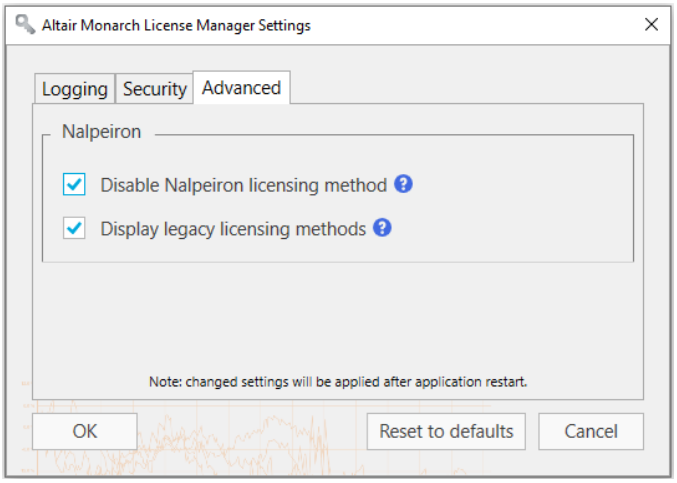
Restart Monarch License Manager. Legacy licensing methods will display in the Choose License Method screen.



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.

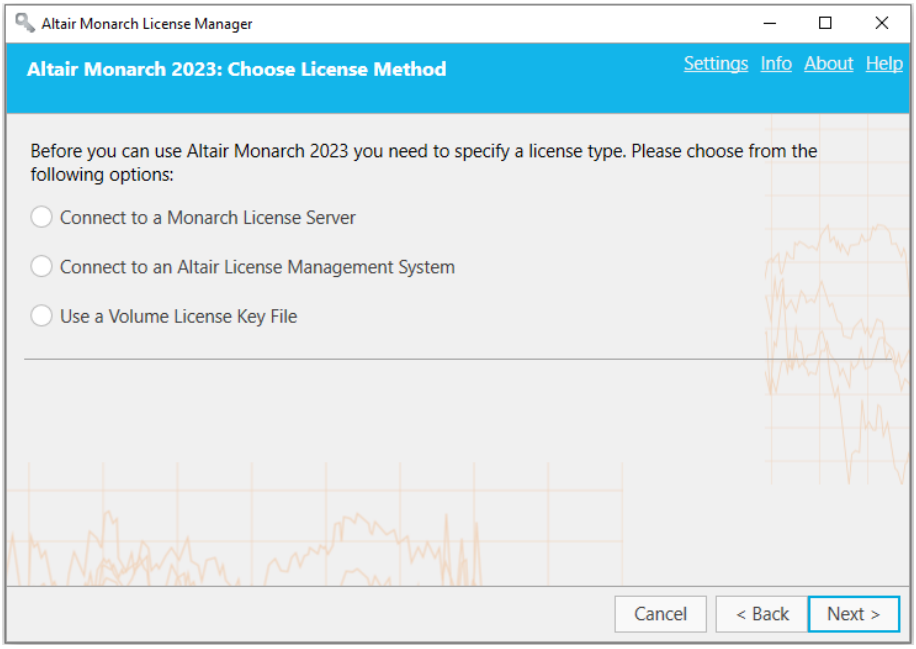
To do so, click **Settings** on the upper right-hand corner of the License Manager and then select the **Advanced** tab.

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



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

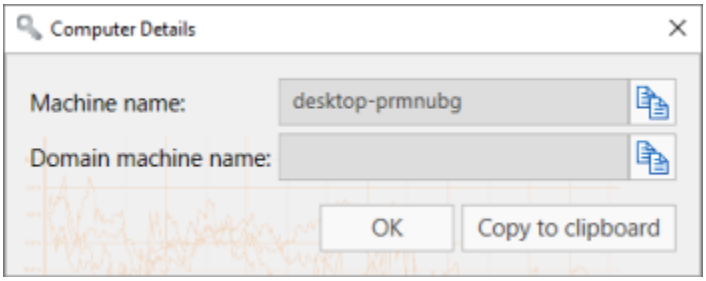
Restart Monarch License Manager. When Nalpeiron licensing is disabled and legacy licensing options are enabled, the option to license Monarch using an activation code no longer displays in the Choose License Method screen of the Monarch License Manager.



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:



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 Altair Community 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.

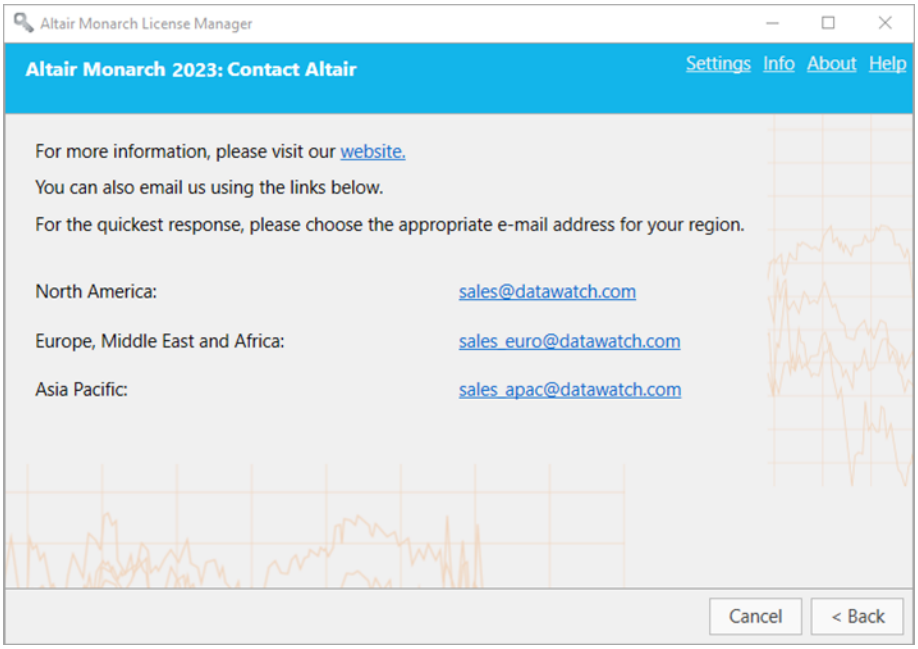
  If you intend to perform a minor upgrade, select **No** to enable automatic activation when your Monarch is upgraded.

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.



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: sales@datawatch.com
Europe: sales_euro@datawatch.com
Asia Pacific: sales_apac@datawatch.com

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