



Altair[®] Monarch[®] 2025.0 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 2025.0.

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 2025.0 is available as a 32- or 64-bit application, but can only be installed in 64-bit operating systems.

If Microsoft/Office 365, specifically the Access Database Engine (ADE) component, is available in the machine in which Monarch will be installed, the installer detects its bitness automatically and matches the bitness of Monarch to it. If ADE is not available prior to installing Monarch, you must install this component to make full use of Monarch's capabilities.

In either scenario, you can manually select the bitness of Monarch to install. Note, however, that mismatches between the bitness of the application and the bitness of the ADE component will cause issues when importing from and exporting to Microsoft Access data sources.

The application can be used even without the ADE component; however, certain features, such as the opening of new Microsoft Access data sources or external lookups, opening of models/projects/workspaces with existing Microsoft Access data sources or external lookups, and exporting to Microsoft Access files, will not work.

ALTAIR MONARCH 2025	_ □ ×
	Welcome
	Altair Monarch® 2025 64-bit installation
	Welcome to the Altair Monarch® 2025 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: ○ 32-bit ◉ 64-bit
	Click Next to continue.
	Next

MINIMUM REQUIREMENTS

- Windows 11 64-bit; Windows Server 2019/2022
- .NET Framework 4.8/4.7.2 (Full Installation)
- Microsoft SQL Server 2017 LocalDB version 14.0.3238.1; Microsoft SQL Server 2019 LocalDB version 15.0.4415.2; Microsoft SQL Server Express 2016/2017/2019
- 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, Mozilla Firefox, Microsoft Edge (Chromium version)

RECOMMENDED SPECIFICATIONS

- Windows 11 64-bit
- .NET Framework 4.8 (Full Installation)
- Microsoft SQL Server 2019 LocalDB version 15.0.4415.2
- B 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.

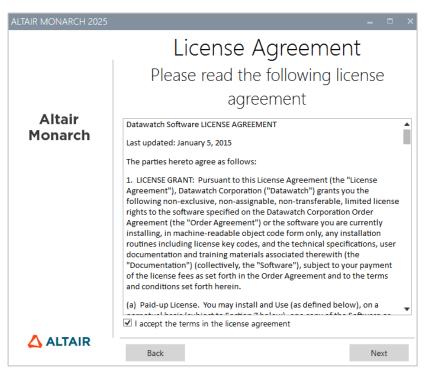
2. The first of these prompts introduces you to the installation program and reminds you of the need to either activate your copy of Monarch or use Monarch on a trial basis after you finish installing the application.

ALTAIR MONARCH 2025	– ¤ ×
	Welcome
	Altair Monarch® 2025 64-bit installation
	Welcome to the Altair Monarch® 2025 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 SQL Server LocalDB should be installed with the application.

ALTAIR MONARCH 2025		-		×
	Prerequisites			
	Configure Prerequisites			
Altair	Microsoft SQL Server LocalDB			
Monarch				
	Back	Ne	xt	

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 2025		- ¤ ×
	Install Location	
	Specify Altair Monarch 2025 ins	stall
	location	
Altair Monarch	Install application files to:	
Monarch	C:\Program Files\Altair Monarch 2025	Browse
	 ✓ Install Sample Files ✓ Install ALM Utils 	
	Back	Install

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

ALTAIR MONARCH 2025		
	Please wait	
	This may take several minutes	
Altair Monarch	Acquiring:	
	Downloading package Altair Monarch® 2025	
	Applying:	
	Car	ncel

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.

 Altair
Monarch
 Process completed
Altair Monarch® 2025

 Launch Altair Monarch® 2025

 Show Installation Log

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

INSTALLING MONARCH USING THE COMMAND LINE

In cases where efficiency, automation, or precise control over which software components are installed is required, Monarch can be installed using the command line.

Assuming that the installer is saved in the folder C: \Monarch_Installer\2025, the application can be installed by launching the Command Prompt and running the following command:

C:\Monarch Installer\2025\AltairMonarchStandaloneInstallerEN.exe

The help menu of the installer provides a list of switches that you can invoke when installing Monarch.

Again assuming that the installer is saved in the folder C:\Monarch_Installer\2025, the help menu can be called by launching the Command Prompt and running the following command:

C:\Monarch Installer\2025\AltairMonarchStandaloneInstallerEN.exe -help

ALTAIR MONARCH INSTALLER HELP		-	×
Altair Monarch® Installer 25.0.0.37686 © Datawatch Corporation 1996-2025			
Usage:			
-quiet	Quiet mode		
-passive	Unattended mode (the installation shows only a progress bar)		
-log	Log file location		
-deactivation	Deactivate flag		
-installFolder	Install folder location		
-sampleFiles	Install folder location for sample files (for quiet mode only)		
-noSampleFiles	Do not install sample files (for quiet mode only)		
-noAlmUtils	Do not install ALM Utils (for quiet mode only)		
-noDevartDrivers	Do not install Devart Drivers (for quiet mode only)		
-sqlLocalDbVersion	Version of SQL Server LocalDB to use for the Monarch cache. (e.g. '11.0', '13.0', default	is '11.0	('נ
-excelDefaultImportEngine	Default Excel Engine when creating new Projects & Models [Modern Legacy]		
-excelConvertMetadataToModern	Convert Existing Projects and Models to use the Modern Excel engine.		
-uninstall	Uninstall the application		
-repair	Repair the application		
-activationType	Activation type [altairLicenseServer]		
-x86	Force 32-bit installation. (May affect MS-Access import/export)		
-x64	Force 64-bit installation. (May affect MS-Access import/export)		
-help	Display this help screen.		
	ОК		

For example, assuming that the installer is saved in the folder C:\Monarch_Installer\2025 and you wish to install Monarch using the Modern engine as the default Excel engine with the log files stored in C:\Monarch Installer\2025\logs, run the following command in Command Prompt:

C:\SilentInstall\AltairMonarchStandaloneInstallerEN.exe - excelDefaultImportEngine="Modern" -log "C:\Monarch Installer\2025\logs"

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 a managed Altair Licensing 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.

Farm)			Search	P		Actions
qs			Search	Saved searches		Applications
Show all	Name +	Description	Source	State		13 Add Applications
 Application Folders 	🗱 Citrix Director	Citrix Director	Master Image	Enabled	^	Create Application Group
Applications	Citrix Provisioning Boot		Master Image	Enabled		View
▼ Application Groups	🗱 Citrix Provisioning Cons		Master Image	Enabled		
Application Groups	Citrix Studio	Launches the Citrix Ma	nag Master Image	Enabled		Refresh
User Apps	😣 Citrix XenCenter		Master Image	Enabled		🕜 Help
E oser Apps	Excel		Master Image	Enabled		Selection
	Google Chrome	Access the Internet	Master Image	Enabled		
	C Microsoft Edge		Master Image	Enabled		Applications
	🌵 Monarch 2022 Utility		Master Image	Enabled	1	눹 Create Folder
	Monarch Classic 2022		Master Image	Enabled		Citrix Director
	Monarch Data Prep Stu		Master Image	Enabled		Properties
	Notepad++		Master Image	Enabled		
	N OneNote		Master Image	Enabled		Duplicate Application
	Outlook		Master Image	Enabled		Disable
	PowerPoint		Master Image	Enabled		🗐 Rename
	NDP To Connector1		Master Image	Enabled	-	🎯 Manage Tags
	NDP To Connector2		Master Image	Enabled		Delete
	NDP To SQL1		Master Image	Enabled		Move Application
	NDP To XD1		Master Image	Enabled		
	BP Session Recording Player		Master Image	Enabled	-	Help
Details - Citrix Directo						
Details Groups S						
Application					*	
Name (for administra	tor): Citrix Director	Apr	lication Path:	%ProgramFiles(x86)%\Internet Explo		
Name (for user):	Citrix Director		nmand line arguments:	https://xd1.citrix.lab/Director		
Description:	Citrix Director	Wo	rking directory:	%ProgramFiles(x86)%\Internet Explo		
Folder (for administra Folder (for user):	tors): -	Rec Tag	irected file types:	-		
Visibility:	- Domain Admins (CITRIX\D		s: kimum concurrent instances:	Unlimited		
Ignore user's home zo			kimum instances per user:	Unlimited		

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		
Policies and Profiles	Main Citrix Profile Management Settings Profile Container Settings Profile Handling Advanced Settings Log Settings Registry File Syst 4	+
O Environmental Settings	Citrix Profile Management	
i Microsoft USV Settings	Enable Profile Management Configuration	
Gitrix Profile Management Settings	Profile Management	
	Add	
	ACO	
	Remove	
Actions	Set excluded groups	
	Add	
Filters		
Assignments	Remove	
System Optimization	Process logons of local administrators	
Policies and Profiles	Set path to user store Absolute path or path relative to the home directory Path to the previous user store	
Security	Windows	
Active Directory Objects	Enable active write back Enable active write back	
	Enable offine profile support	
Transformer Settings		
Advanced Settings		
Administration	Actions	
Monitoring	Apply Cancel	
Connected to : admin	€ € Current access level : Global Full Access	s .::

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

Conversionmental Settings Conversion Wicrosoft USV Settings Conversion Wicrosoft USV Settings Conversion Settings	Citrix Workspace Environment Management _ E X
Actions Actions Actions Assignments System Optimization Policies and Profiles Security Active Directory Objects Advanced Settings	agement Settings Profile Container Settings Profile Handling Advanced Settings Log Settings Registry File Syst (
Actions Filters Fi	cached profiles on logoff efore deleting cached profiles conds o [] o cipi o ci
Security Active Directory Objects Advanced Settings	ration of existing application profiles rofile conflict handling Il Windows user profile and a Citrix user profile exist in the user store profile
Active Directory Objects Transformer Settings Advanced Settings	
	rofile overrides local profile rofile overrides roaming profile rofile used as Citrix mandatory profile for all logons
Administration Actions	
Monitoring	Apply Cancel

- 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

		_ = ×
Home About		
Configure license server 🚯 Get Help	Options About	_
Configure license server 🕜 Get Help	Uptions About	
License Management 😼 Support 😰 Lo		
Policies and Profiles	Profile Handling Advanced Settings Log Settings Registry File System Synchronization Streamed User Profiles Cross	-Platform Sett
Environmental Settings	Synchronization	
Microsoft USV Settings	Enable Directory Synchronization	
Gitrix Profile Management Settings	AppData Loca DataPrepStudio AppData Loca Vicrosoft Vicrosoft SQL Server Local DB\Instances Datawatch.Engine.14.0	Add
	\AppData\Local Monarch\	Remove
		Add
Actions		Remove
Filters		
Assignments	Enable Folder Mirroring	
System Optimization		Add
Policies and Profiles		Remove
Security	Enable Large File Handling	
Active Directory Objects		Add
Transformer Settings		Remove
Advanced Settings		
Administration	Actions	
Monitoring	Apply	Cancel
Connected to : admin	Ourrent access level :	Global Eul Access

Deployment

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

- 1. Create a machine catalog.
- 2. 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 in which Citrix Studio has been installed. Log in as an Administrator and make sure you have administrative rights before proceeding.

			Actions
			Citrix Studio (Local Farm
Common Tasks Actions PowerShell Studio Help			View
		ARCON NUMBER OF STREET, STREET	Refresh
Common Tasks Use this screen to perform common maintenance tasks.			7 Help
Site configuration			
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	••••••••••••••••••••••••••••••••••••••	
Altair Windows 2016	1 Machine	=	
Connector1	1 Machine 1 Machine		
Linux Desktop Windows 10 Single Desktop	2 Machines		
	Machines	Update master image Test catalog	
Delivery groups			
Admin Desktop	1 Machine	^	
Connector1	1 Machine		
Linux Desktop	1 Machine		
Windows 10 Single Desktop	1 Machine		

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

Citrix Studio (Local Farm)				Actions	
Search Machine Catalogs				Machine Catalogs	
Delivery Groups	Machine Catalog	# Machine type	No. of machines Allocate	ed machines 🛛 🛅 Create Machine Catalog	Т
Applications	Admin Desktop	Multi-session OS	1	1 View	-
Policies	Allocation Type: Random	User data: -	Provisioning method: Manual	G Refresh	
P Logging	Altair Windows 2016	Multi-session OS (Virtual)	1	0	
Configuration	Allocation Type: Random	User data: On local disk	Provisioning method: Manual		
Controllers	Connector1	Multi-session OS (Virtual) User data: On local disk	1 Description in a state of Manual	1 Admin Desktop	
Hosting	Allocation Type: Random Linux Desktop	Multi-session OS (Virtual)	Provisioning method: Manual	1 Add Machines	
🖧 Licensing	Allocation Type: Random	User data: On local disk	Provisioning method: Manual	Edit Machine Catalog	
StoreFront	Windows 10 Single Desktop	Single-session OS	2	1 View Machines	
App-V Publishing Zones	Allocation Type: Random	User data: -	Provisioning method: Manual	Delete Machine Catalog	
Unies 2011es				Rename Machine Catalog	
				Upgrade Catalog	
	Details - Admin Desktop	Annue		_	
	Details Machines Administrators				
	Machine Catalog	Machine			
	Name: Admin Desktop Machine Type: Multi-session C Provisioning Method: Manual Allocation Type: Random Set to VDA Version: 7.9 (or newer)			=	

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: 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.
Don't show this again

3. Click Next on this Wizard.

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

Studio	Operating System
Studio Introduction Operating System Machine Management Master Image Virtual Machines Computer Accounts Summary	 Select an operating system for this Machine Catalog. Multi-session OS 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. Single-session OS The single-session OS machine catalog provides VDI desktops ideal for a variety of different users. 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 Operating System 	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 Summary	 Citrix Machine Creation Services (MCS) MCS is not available when using physical hardware. Resources: xstok5630334861049856-root-bCAE3UXbBP5s (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
 ✓ Introduction ✓ Operating System ✓ Machine Management Machines Summary 	CITRIX\CONNECTOR2\$
	Remove Import list Export list Add computers Select the minimum functional level for this catalog: 7.9 (or newer) The selected VDA version (or newer) in order to register in Delivery Group that reference this machine catalog. Learn more

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

Studio	Summary	
 ✓ Introduction ✓ Operating System ✓ Machine Management ✓ Machines Summary 	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 Delivery Groups and then Create	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				
🗢 🔿 🙇 📰 🚺 🖬				
Citrix Studio (Local Farm)				Actions Machine Catalogs
Machine Catalogs	Machine Catalog +	Machine type	No. of machines Allocated machines	Create Machine Catalog
B Delivery Groups Applications	Admin Desktop	Multi-session OS	Anocated machines	
Policies	Allocation Type: Random	User data: -	Provisioning method: Manual	
Z Logging	Altair Windows 2016	Multi-session OS (Virtual)	1 0	Refresh
🗸 🕏 Configuration	Allocation Type: Random	User data: On local disk	Provisioning method: Manual	👔 Help
Administrators	Connector1	Multi-session OS (Virtual)	1 1	Connector2
Controllers	Allocation Type: Random	User data: On local disk	Provisioning method: Manual	Add Machines
Licensing	Connector2	Multi-session OS		
StoreFront	Allocation Type: Random	User data: -	Provisioning method: Manual	🐻 Edit Machine Catalog
🙀 App-V Publishing	Linux Desktop	Multi-session OS (Virtual)	1 1	S View Machines
Zones	Allocation Type: Random	User data: On local disk	Provisioning method: Manual	🖳 🖳 Delete Machine Catalog
	Windows 10 Single Desktop	Single-session OS	2 1	🗐 Rename Machine Catalog
	Allocation Type: Random	User data: -	Provisioning method: Manual	K Upgrade Catalog
				Help
				I help
				h !
	Details - Connector2			
	Details Machines Administrators			
	Machine Catalog	Machine		
	Machine Catalog	Machine		
	Name: Connector2	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: Primarv		•	
_				

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						- 🗆 X
File Action View Help						
←						
Search						Actions
Machine Catalogs						Delivery Groups
B Delivery Groups	Delivery Group	+	Delivering	No. of machines	Sessions in use	1 Create Delivery Group
Applications	Admin Desktop Multi-session OS		Applications and Desktops	Total: 1 Unregistered: 0	Total: 2 Disconnected: 1	View •
Policies	Connector1		Desktops	Total: 1	Total: 0	G Refresh
✓ is Configuration	Multi-session OS		besktops	Unregistered: 1	Disconnected: 0	Help
Administrators	Linux Desktop		Desktops	Total: 1	Total: 0	Admin Desktop
Controllers	Multi-session OS			Unregistered: 0	Disconnected: 0	Admin Desktop
Hosting	Windows 10 Single Desktop Single-session OS		Desktops	Total: 1	Total: 1 Disconnected: 1	-
StoreFront	Single-session OS			a onregistere	Disconnected: 1	Y Add Applications
🔂 App-V Publishing						Edit Delivery Group
Zones						🍻 Manage Tags
						🚟 Turn On Maintenance Mode
						Rename Delivery Group
						Relete Delivery Group
						🗾 View Machines
						🛒 View Applications
						Upgrade Delivery Group
						Difference Test Delivery Group
						7 Help
	Details - Admin Desktop					
	Details Applications Desi	ktops Machine Catalogs Usa	ge Tags Application Groups	Administrators		
	Delivery Group		State		<u> </u>	
	Name:	Admin Desktop	Enabled:	Yes		
	Description: Set to VDA Version:	Admin Desktop	Maintenance Mode:	Off	-	
	Set to VDA Version: Users:	7.9 (or newer) Allow authenticated users	Registered Machines: Unregistered Machines	1		
	Scopes:	All	Registration Missing:	0		
	StoreFronts: Session prelaunch:	- Off	Powered off Machines: Total Machines:	0	-	
			iour 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
	Back Next Cancel

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.

Studio	Mac	nines		
	Selec	t a Machine Catalog.		
Introduction	0	Catalog Altair Windows 2016	Type RDS Manual Random	Machines 1
Machines	۲	Connector 2	RDS Manual Random	1
Machine allocation Users Applications Desktop Assignment Rules Summary		Windows 10 Single Desktop Windows 10 Desktop	VDI Manual Random	1
	Choo	se the number of machines for this E	Delivery Group:	-+

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.
	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	
	Add Remove
	Add Remove Give access to unauthenticated (anonymous) users; no credentials are required to access StoreFront This feature requires a StoreFront store for unauthenticated users.

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

Studio	Applications
 Introduction Machines Users Applications Desktops Summary 	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	ld Existing Applications				
	Select from applications p	reviously	added to the Site.		it source
Introduc	Show all	-	Name	+	oups will lication
	Applications		Citrix Director	-	
^e Machine			Citrix Provisioning Boot Device Manager		
Users			🗱 Citrix Provisioning Console		
Applicat			🞇 Citrix Studio	-	
Desktop			🔇 Citrix XenCenter		DO:
Summar			X Excel		63
			💿 Google Chrome		1
			💽 Microsoft Edge		
		~	🎶 Monarch 2022 Utility		
		~	Monarch Classic 2022		
		 Image: A start of the start of	Monarch Data Prep Studio 2022		
			🞽 Notepad++		
			Note OneNote	-	
		3 of	24 applications selected		
			OK Ca	ncel	

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

Studio	Applications	
 ✓ Introduction ✓ Machines 	To add applications, click "Add" and choose a source. Then select applications fro If you choose Application Groups, all current and future applications in the select be added. You can also place new applications in a non-default folder and chang properties.	ed groups will
✓ Users	Name	+
	🌵 Monarch 2022 Utility	
Applications	M Monarch Classic 2022	
Desktops	Monarch Data Prep Studio 2022	
	Add Remove Properties	
	Place the new applications in folder:	
	Applications\	

- 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	
	Machine Catalog:	Connector 2
Introduction	Machine type:	Multi-session OS
Machines	Allocation type:	Random
/ Users	Machines added:	CITRIX\CONNECTOR2 1 unassigned
Applications	Users:	Allow authenticated users
Ø Desktops Summary	Applications to add:	Monarch 2022 Utility, Monarch Classic 2022, Monarch Data Prep Studio 2022
	Launch in user's home zone:	No
	Delivery Group name:	
	Example: Finance Win OS	
	Delivery Group description, use	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 (Local Farm)					Actions
Search Machine Catalogs					Delivery Groups
B 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	View
Policies	Multi-session OS Connector1	Desktops	Unregistered: 0 Total: 1	Disconnected: 1 Total: 0	Refresh
✓ i Configuration	Multi session OS	Desktops	Unregistered: 1	Disconnected: 0	Help
Administrators	Connector2	Applications	Total: 1	Total: 0	Connector2
🚟 Controllers 💻 Hosting	Multi-session OS	0 .1	Unregistered: 1	Disconnected: 0	Add Machines
Licensing	Linux Desktop Multi-session OS	Desktops	Total: 1 Unregistered: 0	Disconnected: 0	Add Applications
StoreFront	Windows 10 Single Desktop	Desktops	Total: 1	Total: 1	Edit Delivery Group
App-V Publishing Zones	Single-session OS		🛕 Unregistere	Disconnected: 1	Manage Tags
Unes Unes					Turn On Maintenance Mode
					Rename Delivery Group
					Delete Delivery Group
					View Machines
					View Applications
					View Applications Upgrade Delivery Group
					Test Delivery Group
					🛛 Help
_					
	Details - Connector2				
	Details Applications Desktops Machine Catal	ogs Usage Tags Application Groups			
	Name		Source		
	Monarch 2022 Utility		Master Ir	-	
	Monarch Classic 2022 Monarch Data Prep Studio 2022		Master Ir Master Ir	3	
	The monarch bata Frep Studio 2022		Master Ir	nage	
L					
1					

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

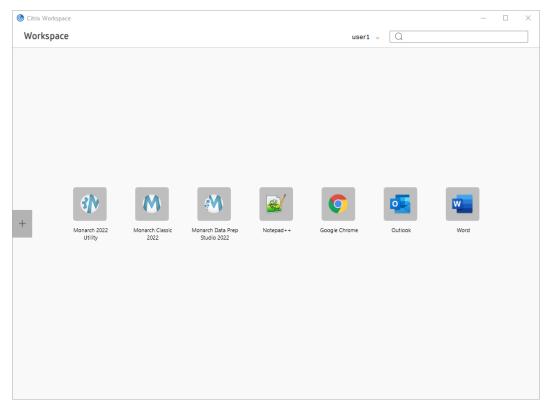
Add Ad Citrix Workspace	ccount	×
User name:		
Password:		
	Sign In Cancel	
Secure c	onnection	

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

i Gitrix Gateway × +		✓ - □ ×
← → C i 162-133-68-244.mycitrixdemo.net/vpn/index.html		🖻 🛧 🗹 й 👂 🗯 🖬 📵 🗄
Citrix Gateway	Please log on User name User1 Password Log On	

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

In Citrix Workspace:



In Citrix Receiver:

ne user1! tes						
*						
	* 🔊	*	* 💿	*	* w	
rch 2022 Monarch Clas tility 2022	Assic Monarch Data Prep Studio 2022	Notepad++	Google Chrome	Outlook		
				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.

ALTAIR MONARCH LICENSE MANAGER

The main interface used to activate Monarch is Altair Monarch License Manager (License Manager). This tool launches the first time you run Monarch after installation, 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	-		×
Altair Monarch 2025: Choose License Method Settings	<u>Info</u>	About	<u>Help</u>
	_		
Before you can use Altair Monarch 2025 you need to specify a license type. Please choose following options:	from t	he	
🔿 Start Trial			
Connect to an Altair License Management System			
	1	M	white the second
My North many			
Cancel <	Back	Nex	t >

You can switch from one type of licensing to another at any time you wish by using 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 Monarch License Manager and select any of the other licensing options available to you.

ACTIVATION METHODS

You can activate Monarch by connecting to a **managed Altair Licensing System** or **Altair Monarch License Server**, or using a **Volume License Key File**.

- Activation through a managed Altair Licensing 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. Note that this option is a legacy licensing method and must be enabled before it can be used.
- 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.

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

ENABLING/DISABLING LEGACY LICENSING METHODS

The default licensing option for Monarch is an Altair License Management System. If you wish to enable legacy licensing options (i.e., Monarch License Server 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	
_ Legacy Licensing	
Display legacy licensing methods 3	
OK Reset to defaults Cano	el

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.

💊 Altair Monarch License Manager		-		×
Altair Monarch 2025: Choose License Method	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
Before you can use Altair Monarch 2025 you need to specify a license type. Please following options: Start Trial Connect to an Altair License Management System Connect to a Monarch License Server Use a Volume License Key File	choose f	rom t	the	
Cance	9	Back	Nex	t >

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, select the **Start Trial** button in the *Choose License Method* screen of License Manager. If Monarch is successfully activated using a trial license, the following popup displays.

S Information		×
Trial License has	s been successfully activat	ed.
		OK

When using the software in trial mode, the following popup displays to remind you of when your trial expires.

	Product License	Expiry Warning - 29 Days Remaining	×
	PRODU	CT EXPIRY WARNING	
This product will e	expire on: 2/13/20	24	
· · · · · · · · · · · · · · · · · · ·		ubscription basis, please ensure you renew a e to avoid disruption.	and obtain
Please contact kw	-renewals@altair.	com for more information on renewing you	r license.
	OK	Copy License Information	
	C	Hide this warning message until 1 week b	efore expiry

When the application is run, the number of days/hours remaining in your trial displays in the middle of the screen and persists in the upper righthand corner of the application window.

Trial License Expires: 2/13/2024

NOTE	A connection to the internet is required to start the application in trial mode.
	Monarch Classic is not supported in trial mode.
	COM and CLI automation are not supported in trial mode.
	Exports in trial mode are limited to 10 rows.

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

A managed Altair Licensing 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 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 Units License Configuration screen displays.

🔍 Altair Monarch License Manager			-		×
Altair Monarch 2025: Altair Units License Configuration		<u>Settings</u>	<u>Info</u>	<u>About</u>	Help
Managed Licensing Activation Local Licensing			-		
Altair Units: Authentication failed					
Configure No authorization token found in Altair Units config files					_
ALTAIR_LICENSE_PATH:				M	W2
Advanced			T.	KAW	
Borrowing Duration (in hours):	Optimization: 🤅	Auto			-
Advanced Licensing Tools Ping	Te	st Connec	tion	Host	Ds
	Cance	el <	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 your browser 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				☆ ⊥ i
Altair One					Feedback 🤱
Dashboard R. Users Ucense Settings	Setting Authorized I				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	D4:25:88:05:10:05 , 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	× +				• - • ×
← → C 🔒 admin.altairon	e.com/updateprofile				x 🛓 i
iii Altair One					Feedback <u>Q</u>
Dashboard	Settings Authorized N	Machines			
License Settings	Authorized Machi	ines (2)			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	D4:25:88:05:1D: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 🔉	< +				• - • ×
← → C 🔒 admin.altairon	e.com/updateprofile				☆ 😩 i
iii Altair One					Feedback 🔍
Dashboard R. Users License Settings	Settings Authorized	Machines			
옷 User Profile	Auth Codes can be	Y	ors to quickly autho multiple mac our Auth Code is: TE xpires in 14 minutes	hines. DPACOOD 🏚	e users on a single machine and/or
	Authorized Mach	ines (2)			Q
	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	

- 4. In 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.

🔍 Altair Units Configuration	-		×
Configuration scope: User Authorization Authorization Token: Authorize Host: User	vy Proxy is not set (across all scopes) Proxy required t: : 0 mname: word:	evert	×
4) Generate an authorization token 5) Input the code in the text box above and press Authorize Information			
ALM_HHWU_CONFIG @ ALM_HHWU_USE_WININET @			
		Close	

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

🔍 Altair Units Configuration			-		×
Configuration scope:	User 🔻	0			
Authorization Authorization Token:		xy is not set (acro	ss all scope	s)	
9GIK630B Authorize	Host:	quirea			
S Information		×			
1) Go to https://admin.altairg	ccessful!	ОК	Save	Revert	
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	XIII				
ALM_HHWU_CONFIG ALM_HHWU_USE_WININET					
				Clos	e

- 6. Click **OK** and then close the screen when you are finished.
- 7. The license borrowing functionality allows users to check out their licenses for offline use. To configure it for your Monarch applications, specify the maximum number of hours for which the license can be borrowed in the Advanced > Borrowing Duration field. The default limit is 24 hours.

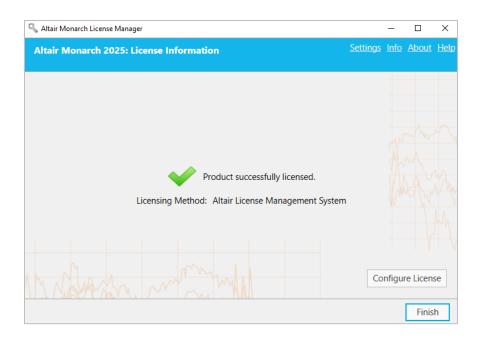
This limit applies to license borrowing in Monarch Data Prep Studio (under **Application Default Settings > About**) and Monarch Classic (in the **File > Help** menu).

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 previous 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.

🔍 Altair Monarch License Manager		-		×
Altair Monarch 2025: Altair Units License Configuration	<u>Settings</u>	<u>Info</u>	<u>About</u>	Help
Managed Licensing Activation Local Licensing				
Activation Key:				
License Store: User				
C:\Users\admin\AppData\Local\altair_licensing\DESKTOP-PRMNUBG\licenses??[w???9	<u>E?</u>			P
Import License File Status	Deactiv	ate	Activa	te
_ Information		W	LAV	YA.
ALTAIR LICENSE PATH:				Y
				M
Advanced		-		
Borrowing Duration (in hours): 24 - Optimization:	3 Auto			
Advanced Licensing Tools Ping Te	st Connec	tion	Hostl	Ds
Canc	el <	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.
- 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.
- The license borrowing functionality allows users to check out their licenses for offline use. To configure it for your Monarch applications, specify the maximum number of hours for which the license can be borrowed in the Advanced > Borrowing Duration field. The default limit is 24 hours.

This limit applies to license borrowing in Monarch Data Prep Studio (under **Application Default Settings > About**) and Monarch Classic (in the **File > Help** menu).

- 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 <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.

S Import License File	-		×
License File to Import		Brow	se
License Store: 3	User		
	C:\Users\admin\AppData\Loca\\.altair_licensing\DESKTOP-PRMNUBG\licenses~?fA?\??\C\Users\admin\ finy\Xii	\AppData\	<u>Local</u>
Import		Clos	e

- 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. The license borrowing functionality allows users to check out their licenses for offline use. To configure it for your Monarch applications, specify the maximum number of hours for which the license can be borrowed in the Advanced > Borrowing Duration field. The default limit is 24 hours.

This limit applies to license borrowing in Monarch Data Prep Studio (under **Application Default Settings** > **About**) and Monarch Classic (in the **File** > **Help** menu).

- 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.

Itair Monarch 2025: Altair Units License Configuration		<u>Settings</u>	<u>Info</u>	<u>About</u>	He
Managed Licensing Activation Local Licensing			+		
On-premise License Server:					
Standalone License File:				Brow	se
Information			The second		
ALTAIR_LICENSE_PATH:					
Advanced			T	KW	AV.
Borrowing Duration (in hours):	Optimization: 💡	Auto		1	Ŧ
Advanced Licensing Tools Ping	Tes	t Connec	tion	Host	IDs
	Cance	<	Back	Con	ne

- 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. The license borrowing functionality allows users to check out their licenses for offline use. To configure it for your Monarch applications, specify the maximum number of hours for which the license can be borrowed in the Advanced > Borrowing Duration field. The default limit is 24 hours.

This limit applies to license borrowing in Monarch Data Prep Studio (under **Application Default Settings > About**) and Monarch Classic (in the **File > Help** menu)..

- 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 2025\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 Altair Monarch License Manager and then launching the **almutil_gui** application in the folder that displays.

S Altair License Utility File Edit Tools Help		_	×
·	Licensing Activation Borrowing Remote Admin		
HostID Type	Description	Сору	
	Intel(R) 82574L Gigabit Network Connection Phoenix Technologies LTD - INTEL - 6040000	Refresh Export To File	
693219183473 WIN_INSTALL_ID	Windows Installation ID	Dongle Support	

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.

ostID License Usage	Managed Licensing	Activation E	orrowing Remote Adm	nin		
Authorization			Proxy Configuration			
E-mail Address	ze with Altai		Proxy Host Proxy Port			
Password		Sign In	Proxy Usernam Proxy Password			
<u>Use Auth Code</u> ▼				Save	Re	vert

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**.

Altair License Utility			-	- 🗆	×
File Edit Tools Help					
HostID License Usage Managed Li	censing Activation	Borrowing Remote Admin			
	-	_			
Activation Key	YYYYY-YYYY	Y-YYYYY-YYYYY			
License Store	User	~			
License Store	C:\Users\adr	min\AppData\Local\.altair licensing	DESKTOP-PRMNUBG Vicenses		
			Activa	ate	

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**.

License Usage Managed Licensing Activation Borrowing Remote Admin HostID HostID Type Descriptin Copy 000C298CC988 ETHERNET Intel(R) 8257 Refresh 14258B051D05 ETHERNET Blocs Phoenix Tect 1/Mware-564d94cd76b01df3-daf8cc8362bcc988 BlOS Phoenix Tect Dongle Support 32666208753012809422775174176268814247662338342377676924661525 WIN_INSTALL_ID Windows Instance	Edit	Tools Help							
000C298CC988 ETHERNET Intel(R) 8257 V4258B051D05 ETHERNET Bluetooth Dr VMware-564d94cd76b01df3-daf8cc8362bcc988 BIOS Phoenix Tect	lostID	License Usage	Managed Licensing	Activation	Borrowing	Remote Admin			
V4258B051D05 ETHERNET Bluetooth De //Mware-564d94cd76b01df3-daf8cc8362bcc988 BIOS Phoenix Tect			HostID			Туре	Descriptio	Сору	
Mware-564d94cd76b01df3-daf8cc8362bcc988 BIOS Phoenix Tect	00C29B	CC988			I	ETHERNET	Intel(R) 8257	Refresh	
	04258B05	51D05			I	ETHERNET	Bluetooth De	Export To File	
32666208753012809422775174176268814247662338342377676924661525 WIN_INSTALL_ID Windows Ins	/Mware-	564d94cd76b01d	f3-daf8cc8362bcc988			BIOS	Phoenix Tecł	Dongle Support	
	3266620	875301280942277	5174176268814247662	338342377676	924661525	WIN_INSTALL_ID	Windows Ins		

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.

🕄 Altair L	icense Utility		_	\times
File Edit	Tools Help			
HostID	S Offline Activation Wizard		? X	
	Offline Activation Wizard Connection Test			
	Checking your connection to the License Activation Service Success!	< Back	Next >	

- 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 generated in Step 4 and select a store location. Click **Import** when you are finished.

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

- 7. Using Machine A, launch 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: 25.0	
Expires: 6/24/2025 12:00 AM	
Source: C:\Users\WinX64Local\AppData\Loc	cal
\.altair_licensing\DESKTOP-6PTPKE6\licenses\	
	Ж

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

Monarch is successfully activated.

S Altair Monarch License Manager		-		×
Altair Monarch 2025: License Information	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Help</u>
Product successfully licensed. Licensing Method: Altair License Management System				
Mr. North many many market	Co	nfigu	re Licen	se
			Finis	h

ACTIVATION USING MONARCH LICENSE SERVER

Monarch 2025.0 can be activated via Monarch License Server. You can also implement a license server "mirror" to use as a failover server in case your target license server fails. Note that this option is a legacy licensing method and <u>must be enabled</u> before it can be used.

Activating Monarch via Monarch License Server

Steps:

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

S Altair Monarch License Manager		_		×
Altair Monarch 2025: License Server Connection	<u>Settin</u>	<u>as Info</u>	<u>About</u>	<u>Help</u>
Server Name:	Ŧ	Port:	5151	5 🔷
Instance Name:				_
License Server Connection Security Information		AV M	Mw	
Failover Servers 💡			A	
				Y
Add			V	
My North many my				
С	ancel	< Back	Con	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			_		×
Altair Monarch 2025: Licens	e Server Connection	<u>Set</u>	<u>ttings</u> Info	<u>About</u>	<u>Help</u>
Server Name: Instance Name: License Server Connection Sec Scheme: http Failover Servers ?	Search win-hi2hek58iaq	2	Port:	5151	5
Add	Cancel				
M. Marshin r	MMM				
		Cancel	< Back	Con	nect

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.

S Altair Monarch License Manager		-		×
Altair Monarch 2025: License Information	Settings	<u>Info</u>	<u>About</u>	<u>Help</u>
Product successfully licensed. Licensing Method: License Server				
Mr. Normanny monthly	Cor	nfigur	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, a 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.

🔍 Failover License Se	rver configuration
Server Name:	▼ Port: 51515 🗸
Instance Name:	Monarch_Default
License Server	Connection Security Information
Scheme: http	Starten Martin
	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 Solution to modify the details of the failback server selected.
- Click on the Delete X 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 Monarch License Server, the following dialog boxes display when launching Monarch Classic:

M U	icense Server - win-hi2hek58iaq - Monarch	n_Default X
User Name:		
Password:		
_	Authentication credentials	
ОК	Cancel	nge Password

and Monarch Data Prep Studio:

License Server			×		
User Name					
Password:					
Use Windows Authentication Save user credentials					
	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

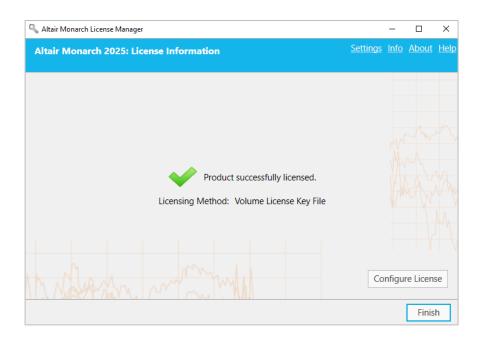
Monarch 2025.0 can be activated via a volume license key file. Note that this option is a legacy licensing method and <u>must be enabled</u> before it can be used.

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 Mana	ger		_		Х
Altair Monarch 2025:	/olume License Key File	<u>Settin</u>	<u>gs Info</u>	<u>About</u>	<u>Help</u>
Volume License Key File:				Brov	vse
M. M.					
111 North Mark					
		Cancel	< Back	Nex	t >

- 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.

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 two ways you can deactivate your copy of Monarch:

- Deactivate Monarch using Monarch License Manager
- Department Phone or e-mail Altair Support

DEACTIVATING MONARCH USING THE ALTAIR LICENSE MANAGEMENT SYSTEM

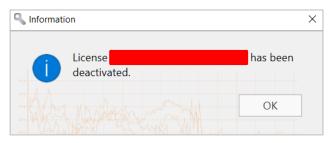
If you activated your copy of Monarch using an Altair activation key, you can deactivate your activation key via a managed Altair Licensing System.

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 2025: Altair Units License Configuration	<u>Settings</u>	<u>Info</u>	<u>About</u>	<u>Hel</u>
Managed Licensing Activation Local Licensing		-		
Managed Licensing Activation Local Licensing Activation Key:				
License Store: User 🔹 🥑				
C:\Users\admin\AppData\Local\aitair_licensing\DESKTOP-PRMNUBG\icenses00????V	Deactiv		Primary Co Activat	
_ Information		W	A	XA
ALTAIR_LICENSE_PATH:				
Advanced		_		WW
Borrowing Duration (in hours): 24 🔦 Optimization:	3 Auto			•
Advanced Licensing Tools Ping Ping	est Connec	tion	Hostl	Ds
Cano	el <	Back	Conr	nect

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



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:

USA

Phone: +1 800 988 4739

UΚ

Phone: +44 204 519 4195

Email

dasupport@altair.com

UPGRADING MONARCH

Monarch upgrades may be considered a minor upgrade, an example of which would be installing Monarch version 2024.1 after installing Monarch version 2024.0, or a major upgrade, an example of which would be installing Monarch version 2025.0 after initially installing Monarch version 2024.0.

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 key is required.
- 2. If you wish to perform a major upgrade, you may need to obtain a new Monarch license or activation key. You can do so by reaching out to your Account Manager or contacting <u>Altair Support</u>.

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 key or license key file, the upgraded version is automatically activated using this key 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 key, 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.