
Version 15.3

MONARCH SERVER
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Monarch Server System – Installation Procedure

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

- Monarch Server Automation Edition

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

Software Requirements

**Server software:**
- .NET framework 4+ 32/64-bit
- Operating systems:
  - Windows Server 2008 SP2 32/64 bit
  - Windows Server 2008 R2
  - Windows Server 2012 32/64 bit
  - Windows Server 2012 R2 64 bit
  - Windows Server 2016

**Additional system software components:**

Note that the following components will be installed automatically by the installation program if not present on the machine. However, it may be advisable to install these at a convenient time (for example, a scheduled maintenance window) before attempting the installation, as these requirements may require system reboots.

- .NET framework 4.5 32/64-bit / .NET framework 4.6 32/64-bit
- IIS 7.5/8.0
- Microsoft Database Access Engine 2010 SP2 32/64-bit
- Microsoft SQL Command Line Utilities 11 for SQL Server (if the Automator database is not present on the local machine)
- Microsoft ODBC Driver 11 for SQL Server (if the Automator database is not present on the local machine)
- Microsoft SQL Server 2014 32/64-bit Express (if the Automator database is present on the local machine)
- SQL Server 2014 Management Studio Express (if the Automator database is present on the local machine)
SQL Server 2012 Express Local DB SP1 32/64-bit

Client software:
- One of the following browsers:
  - Internet Explorer 10+
  - Mozilla Firefox (latest version)
  - Google Chrome (latest version)
  - Microsoft Edge 38+

Hardware Requirements

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

Memory:
- **Recommended**: 8 GB RAM or greater

Network Adapter:
- **Recommended**: Ethernet 100 Mbps or higher (Gigabit recommended)

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

Monitor
- **Recommended**: Screen resolution of 1920 × 1080 (or 1366 × 768 for wide screens)
Recommended Software Versions

The following software versions are recommended for Automator.

<table>
<thead>
<tr>
<th>SOFTWARE</th>
<th>VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metadata database:</td>
<td></td>
</tr>
<tr>
<td>MS SQL Server</td>
<td>2016</td>
</tr>
<tr>
<td>Application server:</td>
<td></td>
</tr>
<tr>
<td>• Operating System</td>
<td>Windows Server 2016</td>
</tr>
<tr>
<td>• IIS</td>
<td>10.0</td>
</tr>
<tr>
<td>• .NET Framework</td>
<td>4.7.1</td>
</tr>
<tr>
<td>For end users:</td>
<td></td>
</tr>
<tr>
<td>Browser</td>
<td>Google Chrome (latest version)</td>
</tr>
</tbody>
</table>

Before You Begin

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

SYSTEM COMPONENTS

The Monarch Server system consists of the following components:

- Configuration Service
- Agent Service
- Services
- Web Application (Admin)
- Repository

The Agent Service launches the following services:

- Datawatch.RemoteServices.AdminServicesHost.exe
Monarch Server Installation

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

NOTES

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

INSTALLATION PROCEDURE

Steps:

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

   ![Monarch Server Automation Edition Installation Wizard]

   Click Next.
2. The **License Agreement** dialog box appears.

![License Agreement dialog box](image)

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

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

![Installation type dialog box](image)

**NOTES**

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

1. The **Install Location** dialog box appears.

Specify the location settings for Automator installation:

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

b) In the **Web Site directory** field, specify the site name where the web applications are to be installed. If you select the **Use services location** check box, the web application (Admin) will be installed in the Monarch Server Automation Edition directory.

c) In the **Site** field, specify the site name for the web applications.

d) Under **Admin Virtual Folder**, specify the name of the virtual folder for the Administrator web application.

e) In the **Port** field, specify the port for the IIS running.

f) In the **Pool** field, specify the name of the application pool to be used by the web applications.

a) Click **Next**.

2. The **Database Server** dialog box appears.
Specify the database server settings:

a. Specify whether to use an existing SQL Server or to install one by selecting any of the following:

- **Use an existing SQL Server + installation**: Select this option to use an existing installed SQL Server 2014.

- **Install MS SQL Server Express 2014**: Select this option to install SQL Server Express 2014 on the local machine. In this case, the name of the database server instance will be `DWCHAutomator`.

b) In the **Database server that you are installing** field, specify the database server instance by doing one of the following:

- Select *(local)* to install the application to the existing database server instance on your local machine.

- Type the database server instance name in the field.

- Click **Find Servers** to find and select instances of the existing database servers that are accessible from the local machine. The found servers populate the **Database server that you are installing to** drop-down list from which you can make your selection.

c) In the **Connection using** field, specify the authentication method by selecting either current user Windows authentication or server authentication. If you select SQL Server authentication, enter the login ID and password (see the image below).
d) In the **Database name** field, provide a name with which the Automator database will be created.

e) Click **Test Connection** to verify the connection to the server you specified.

f) Click **Next**.

3. The **Ready to Install** dialog box appears.

![Ready to Install dialog box](image)

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

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

To view the license terms for a third-party component, click the **License Terms** button next to the required component.
If you agree to the license terms, select **I accept all the terms in all license agreements**.

Click **Install** to begin the installation.

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

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

- **Open Administrator in default browser**: Select to open the Admin application in the default browser.
- **Show logs**: Select to open the folder containing the installation logs.

5. Click **Finish**.

**Advanced Installation**

1. The **Target platform** dialog box appears. Specify the target platform for Automator.

**NOTES**

This option is available only on 64-bit machines.
Click **Next**.

2. The **Install Location** dialog box appears.

Specify the location settings for Automator installation:

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

b. In the **Web site directory** field, specify the site name where the web applications are to be installed. If you select the **Use services location** check box, the web application (Admin) will be installed in the Monarch Server Automation Edition directory.

c. In the **Site** field, specify the site name for the web applications.

d. Under **Admin Virtual Folder**, specify the name of the virtual folder for the Administrator web application.

e. In the **Port** field, specify the port for the IIS running.
f. In the Pool field, specify the name of the application pool to be used by the web applications.

Click Next.

3. The Service Credentials dialog box appears.

Specify the credentials for the Server administrator:

a. Select the Use “Local System Account” check box if you want to use your local system account.

b. Otherwise, clear the check box and specify a custom user in the User Name field in the required format.

c. In the Password field, enter the corresponding password for the specified user.

d. To find and select a particular user in your domain, use Browse.

Click Next.

4. The Database Server dialog box appears.
Specify the database server settings:

a. Specify whether to use an existing SQL Server or to install one by selecting any of the following:

- **Use an existing SQL Server + installation**: Select this option to use an existing installed SQL Server 2014.
- **Install MS SQL Server Express 2014**: Select this option to install SQL Server Express 2014 on the local machine. In this case, the name of the database server instance will be *DWCHAutomator*.

b. In the **Database server that you are installing to** field, specify the database server instance by doing one of the following:

- Select *(local)* to install the application to the existing database server instance on your local machine.
- Type the database server instance name in the field.
- Click **Find Servers** to find and select instances of the existing database servers that are accessible from the local machine. The found servers populate the **Database server that you are installing to** drop-down list from which you can make your selection.

c. In the **Connection using** field, specify the authentication method by selecting either current user Windows authentication or server authentication. If you select SQL Server authentication, enter the login ID and password (see the image below).
d. In the **Database name** field, provide a name with which the Automator database will be created.

e. Click **Test Connection** to verify the connection to the server you specified. Click **Next**.

5. A dialog box with **Automator migration** settings appears.

To skip this step, click **Next**.
To migrate your existing data and email settings, refer to the following:
Select **Migrate data from Monarch Data Pump Version 7 thru 11** and specify the following migration settings:

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

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

b. Select the **Migrate Email Settings** check box to transfer settings.

c. In the **Location** field, enter location name. The specified location will be used for the imported processes.

NOTES

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

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

e. To verify the Automator connection string, click **Test Connection**.
   Click **Next**.
   The following data will be migrated to the current database:
   - Global distributions
   - Global scripts
   - Alerts
   - Email settings (if the **Migrate Email Settings** check box was selected)
   - Default job disposition settings
   To go to the previous step, click **Back**.

6. The **Ready to Install** dialog box appears.
The **Requirements analysis** section shows the third-party components with the possibility to view the license terms:

- Components with green tick marks are those that have been already installed on the local machine.
- Components with blue arrows are those that will be installed on the local machine.
- To view the license terms for a third-party component, click the **License Terms** button next to the required component.
- If you agree to the license terms, select **I accept all the terms in all license agreements**.
- Click **Install** to begin the installation.

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

If necessary, you can select one of the following check boxes:
• **Open Administrator in default browser**: Select to open the Admin application in the default browser.


• **Show logs**: Select to open the folder containing the installation logs.

8. Click **Finish**.

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

- Monarch Server Automation Edition Tutorial
- Open **Administrator** in default browser
- Run **Agent Service** in console mode
- Run Configuration Service in console mode
- Run Configurator
- Uninstall
Monarch Server Post-Installation Actions

Changing the User Account

NOTES

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

To change the user account

1. Click Start, select Control Panel, and point to Administrative Tools.
2. Double-click Services.
4. Select the Log On tab, and specify account properties.
5. Click **OK** to save changes and start the service.

To run the Monarch Server Agent Service as a regular user

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

1. Grant "Log on as a Service" to the user. To do this, refer to Microsoft’s topic on [Setting Properties "Log on as a Service."](#)
2. Grant “Windows Performance Counters.” To do this, refer to the instructions about [User Permissions for Windows Performance Counters over RPC.](#)
3. Grant user permissions to run net.tcp services. To do this, refer to the topic about [Modifying SMSvcHost.exe.config for WCF.](#)

### NOTES

Note that the path should be
C:\Windows\Microsoft.NET\Framework64\v4.0.30319\SMSvcHost.exe.config.

4. Add user to IIS_IUSRS group to allow the Agent service to manage web applications.
5. Grant full control to the installation directory (C:\Program Files\Datawatch).

## Configuring SSO

To use SSO
1. Open Administrator.

NOTES

In Monarch Server that is upgraded from previous versions (e.g., v13.2), the virtual folders could still be labeled as “DSAdmin” (or “DSClient”). In this case, use “DSAdmin” (or “DSClient”) instead of “MSAdmin” (or “MSClient”) to open the Admin (or Client) page.

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

NOTES

Mapping/aliasing of at least one administrator user is required. If there are no users mapped (MS and AD users are the same), the MS application is inaccessible without direct database modification of the Configuration table to the default state.

To add an administrator user account, choose **Users** under Rights and Privileges in the Navigation Tree. In the **Users** window, click on “+” to add a new user.
In the User window, provide the necessary details. To check if the user account you are creating already exists, click on Check User. Do not forget to click Save.

5. Modify the file `web.config` of the Administrator application (the path is `C:\inetpub\wwwroot\MSAdmin`).

   **NOTES**

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

   a. Disable the following code:

   ```xml
   <authentication mode="">
   <forms loginUrl="~/Login/LoginRedirect" defaultUrl="/Login/LoginIndex" cookieless="UseCookies" timeout="15" name=".ASPXFORMSAUTH" slidingExpiration="true"/>
   </authentication>
   ```

   b. Enable the following code:

   ```xml
   <authentication mode="Windows" />
   <identity impersonate="true" />
   <authorization>
   <deny users="?" />
   </authorization>
   ```

6. Enable Windows, ASP.NET Impersonation authentication on IIS for the Administrator application.
a. Go to Start > All apps > Windows Administrative Tools > Internet Information Services (IIS) Manager.

![Image of IIS Manager]

b. Go to MSAdmin > Authentication, and enable ASP.NET Impersonation status.

7. Restart the Monarch Server Config and Monarch Server Agent Services, IIS.
8. On the login page of the Administrator application, click the SSO button.

**NOTES**

If you fail to define at least one administrator user and cannot login to the Administrator page, edit the Configuration table, and set the OptionValue of SecurityProvider to DEFAULT. The steps are as follows:

a. Open Microsoft SQL Server Management Studio.

b. In the Object Explorer panel, click Databases, and choose the database you are using. (You may check the database name using the Datawatch Server Configurator. Under Configurator, click the Instances tab. The Database Name is shown in the Global Settings window. Refer to the image below.)
c. Under **Tables**, right-click on **dbo.configuration**, and then choose **Edit Top 200 Rows**.

d. Look for the OptionId "SecurityProvider," and then change its **OptionValue** to **DEFAULT** (case sensitive).
Setting User Session Timeout

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

```
C:\inetpub\wwwroot\MSAdmin
```

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

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

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

Setting Administrator Password and E-mail Address

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

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

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

**NOTES**

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

Repairing a Damaged Installation

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

**NOTES**

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

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

To repair a damaged installation

1. Run the `MonarchAutomatorInstaller.exe` file from your installation media, or use the **Add/Remove Programs** feature in the system’s **Control Panel**. The Monarch Server Installation Wizard appears with program maintenance options.
2. Click **Repair**. The following dialog box appears, showing the installation progress.

3. When the repair is complete, the corresponding message will appear.
4. Click **Finish** to exit the Installation Wizard.

## Removing All System Components

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

**To remove system components**

1. Run the *MonarchAutomatorInstaller.exe* file from your installation media, or use the **Add/Remove Programs** feature in the system’s **Control Panel**. The Monarch Server Automation Edition Installation Wizard is launched.

2. Click **Uninstall**. When the operation is complete, the corresponding message will appear.

3. Click **Finish** to exit the Installation Wizard.
Upgrading Installation

Upgrading the Existing Installation

UGRADE FROM ADVANCED INSTALLATION

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

<table>
<thead>
<tr>
<th>Windows Installer</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Error Icon] Another version of this product is already installed. Installation of this version cannot continue. To configure or remove the existing version of this product, use Add/Remove Programs on the Control Panel.</td>
</tr>
</tbody>
</table>

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

NOTES

No upgrade path is available for the advanced installation.
UPGRADE FROM SIMPLE INSTALLATION

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

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

2. Click **Next**.
   
The **License Agreement** dialog box appears.
3. If you agree to the license terms, select **I accept the terms in the license agreement**, and then click **Next**.

4. The **Upgrade** dialog box appears. To upgrade the current application version, specify the **Upgrade** option.

5. Click **Next**.

**NOTES**

The existing database remains, and it is upgraded to the new version. The application directory remains.

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

7. Click **Next**.

8. The **Ready to Install** dialog box appears.

The **Requirements analysis** section shows the third-party components with the possibility to view the license terms:
Components with green tick marks are those that have been already installed on the local machine.

Components with blue arrows are those that will be installed on the local machine.

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

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

Click Install to begin the installation.

9. The previous version of Monarch Server is removed.

Click Finish.

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

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

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


- Show logs: Select to open the folder containing the installation logs.

11. Click Finish.

New Installation

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

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

2. The **License Agreement** dialog box appears.

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

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


Admin

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

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

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

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

<table>
<thead>
<tr>
<th>PARAMETER NAME</th>
<th>DESCRIPTION</th>
<th>DEFAULT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>loginOutOnBrowserCloseEnabled</td>
<td>Enable immediate session termination when the browser or browser tab is closed.</td>
<td>false</td>
</tr>
<tr>
<td>loginOutOnBrowserCloseTimeout</td>
<td>Waiting time for the termination of current session after the browser or browser tab is closed.</td>
<td>5000 (ms)</td>
</tr>
</tbody>
</table>