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Monarch Server System — Installation Procedure

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

- Automator
- Content System
- Report Mining Server (RMS)

The products can be installed on your server together, or each one can be installed separately. Before installing, make sure that the corresponding product is included with the license you obtained.

Note that this install guide provides the steps for installing Monarch Server components in a single server. If you wish to install a distributed setup (i.e., using more than one server), follow the steps detailed in the Monarch Server Advanced Installation Guide instead.

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 R2 64-bit
  - Windows Server 2012 32/64-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 Monarch Server database is not present on the local machine)
Microsoft ODBC Driver 11 for SQL Server (if the Monarch Server database is not present on the local machine)

- Microsoft SQL Server 2014/2016 32/64-bit Express (if the Monarch Server database is present on the local machine)
- SQL Server 2014 Management Studio Express (if the Monarch Server 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+ (for Admin web application)
  - Internet Explorer 8+ (for RMS Client web application)
  - Internet Explorer 8+ (for Client web application)
  - 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, and 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 the Monarch Server System.

<table>
<thead>
<tr>
<th>SOFTWARE</th>
<th>VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metadata database:</td>
<td>2016</td>
</tr>
<tr>
<td>MS SQL Server</td>
<td></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>
</tbody>
</table>

For end users:

Browser • Google Chrome (latest version)

Before You Begin

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

DISTRIBUTABLE AND NON-DISTRIBUTABLE COMPONENTS

Monarch Server is a distributable system. This means that different components of the system can be installed on different machines within a network. There are two types of components: distributable and non-distributable.

Each of the non-distributable components can be installed only once per Monarch Server system.

Distributable components can be installed several times on different computers to form a desired configuration of the Monarch Server system that is tailored to your requirements.

The system consists of the following components:

- Configuration Service
- Agent Service
- Services
- Web Application (Admin, Client, RMSClient)
- Repository

The Configuration Service is a non-distributable component. Install only one instance of the Configuration Service per system.
The **Agent Service** is a distributable component. It should be installed on every server used for Monarch Server system installation. All instances of **Agent Service** use a single **Configuration Service**.

The **Agent Service** launches the following services:

- Datawatch.RemoteServices.AdminServicesHost.exe
- Datawatch.RemoteServices.ClientServicesHost.exe
- Datawatch.RemoteServices.RMSClientServicesHost.exe
- Datawatch.RemoteServices.RMSClientServicesHost.exe

These services can run on different servers.

The **Web Application** is a distributable component. It can be installed on different computers, limited by the number of licensed servers.

The **Repository** is a distributable component. It can be installed on different computers. In most cases, only one instance of **Repository** should be installed.

**DATABASE SERVER PREPARATION**

When the Database Service component is chosen during the installation, the setup will create the Monarch Server -> Server database on the database server. For this, you will need to have a special database user that will be used by Monarch Server setup for database creation and under which Monarch Server will further connect to the database.

**SQL Server**

There are two levels of security that may be set for the Monarch Server database user in SQL Server. They differ in partitioning maintenance task support.

In a Monarch Server database, all report-related data are partitioned by date ranges, and each partition can be managed separately (e.g., backed up, removed, and joined with another partition). For Monarch Server to perform these operations automatically, partition maintenance tasks were designed.

For these tasks to function properly, the Monarch Server database user will require more rights. This requirement may be considered unsecure in some environments, particularly when the database server is used for several databases and not only for Monarch Server. In this case, these rights may be assigned temporarily as the partitioning maintenance task is performed. Another option is to perform partitioning maintenance operations manually.

For setup to create the Monarch Server database — and support the partitioning maintenance task functionality — you will need the **Database Creators** server role to be assigned to the user.
NOTES

This role will allow the user to destroy any database in the system (without reading data). Thus, it is recommended to assign this role only during the time of installation and during partitioning maintenance task operations.

To create the user, login to the database server under System Administrator (sa) user, and execute the following commands:

```sql
exec sp_addlogin 'ES_LOGIN', 'ES_PASSWORD'
exec sp_adduser 'ES_LOGIN', 'ES_USER'
exec sp_addrolemember 'db_ddladmin', 'ES_USER'
exec sp_addrolemember 'db_datareader', 'ES_USER'
exec sp_addrolemember 'db_datawriter', 'ES_USER'
exec sp_addsrvrolemember 'ES_LOGIN', 'dbcreator'
```

If you decide to disable the Database Creator role after the Monarch Server database is created (i.e., after installation is complete), you will need to issue the following command under System Administrator:

```sql
exec sp_dropsrvrolemember 'ES_LOGIN', 'dbcreator'
```

NOTES

The db_owner role may be removed, and the db_executor role may be added. If the db_executor role does not exist, it may be created as follows:

```sql
CREATE ROLE db_executor
GRANT EXECUTE TO db_executor
EXEC sp_addrolemember 'db_executor','ES_USER'
```

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 installation media to the directory from which you are going to install Monarch Server.

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 installation files, double-click MonarchServerInstaller.exe to launch the Monarch Server Installation Wizard.

   Click Next.

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

**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 Monarch Server installation:

a. In the **Install services to** field, specify the folder for Monarch Server 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 applications (Admin, Client, and RMS Client) will be installed in the Monarch Server 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 Administrator web application.

e. Under **Client Virtual Folder**, specify the name of the virtual folder for Client web application.

f. Under **RMS Virtual Folder**, specify the name of the virtual folder for Report Mining Server.

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

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

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 *DWCHMonarchServer*. Note that SQL Server Express 2014 is not supported for Content System.

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 select.

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 Monarch Server database will be created.

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

3. 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.

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.
- **Open Client in default browser**: Select to open the Client application of the Monarch Server in the default browser.
- **Open RMS Client in default browser**: Select to open the RMS Client application of the Monarch Server in the default browser.
- **Show installation 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 Monarch Server.
NOTES

This option is available only on 64-bit machines.

Click Next.

2. The Install Location dialog box appears.

Specify the location settings for Monarch Server installation:

a. In the Install services to field, specify the folder for Monarch Server 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 applications (Admin, Client, and RMS Client) will be installed in the Monarch Server 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 Administrator web application.

e. Under Client Virtual Folder, specify the name of the virtual folder for Client web application.

f. Under RMS Virtual Folder, specify the name of the virtual folder for Report Mining Server.

g. In the Port field, specify the port for IIS running.

h. 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.

   ![Service Credentials Dialog Box]

   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.

   ![Database Server Dialog Box]

   Use an existing SQL Server installation. Or, install MS SQL Server Express 2014. Important note: MS SQL Server Express 2014 is not supported for Content. Use the database that you are installing to:
   - (local) - Find Servers
   - Requires SQL Server Browser Service to be running on SQL server host computer
   - Connection using:
     - Windows authentication credentials of current user
     - SQL Server authentication using Login ID and password
   - Login ID: 
   - Password: 
   - Database Name: 
   - [Save/Refresh] 
   - Test Connection

   Click **Next**.
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 *DWCHMonarchServer*. Note that SQL Server Express 2014 is not supported for Content System.

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 select.

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 Monarch Server 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**

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 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. A dialog box for **RMS migration** appears.
To skip this step, click **Next**.

**To migrate your existing data**

a. Select **Migrate data from RMS Versions 11 thru 12.2**

b. Click **Open Config file to Browse** to select web configuration file from the previous RMS versions that contain storage settings.

Click **Next**.

The following data will be migrated to your RMS database:

- RMS system settings
- Users with their profiles
- Models
- View definitions

To go to the previous step, click **Back**.

7. 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.

8. 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.
- **Open Client in default browser**: Select to open the Client application of the Monarch Server in the default browser.
- **Open RMS Client in default browser**: Select to open the RMS Client application of the Monarch Server in the default browser.
- **Show installation logs**: Select to open the folder containing the installation logs.

9. 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
- Monarch Server Content Edition Administrator’s Guide
- Monarch Server Single Server Installation Guide
- Open Administrator in default browser
- Open Client in default browser
- Open RMS Client 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

To change the user account

1. Click **Start**, select **Control Panel**, and click **Administrative Tools**.
2. Double-click **Services**.
3. Double-click **Monarch Server Agent Service**.
4. Select the **Log On** tab and specify account properties.

5. Click **OK** to save changes and start the service.
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 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 and Client applications (the paths are C:\inetpub\wwwroot\MSAdmin and C:\inetpub\wwwroot\MSClient, respectively).

NOTES

This step is crucial. One simple mistake can result in serious application issues. To avoid potential problems, make a backup of the web.config file before making any changes.
a. Disable the following code:

```xml
<authentication mode="Forms">
  <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 and Client applications.

   a. Go to **Start > All apps > Windows Administrative Tools > Internet Information Services (IIS) Manager**.

   ![IIS Manager](image)

   b. Go to **MSAdmin > Authentication**, and enable ASP.NET Impersonation status.
      
   Go to **MSClient > 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 and Client applications, 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 paths to which are as follows:

- C:\inetpub\wwwroot\MSAdmin
- C:\inetpub\wwwroot\MSClient
- C:\inetpub\wwwroot\RMSClient

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 after 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 using 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”).
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 missing or damaged files of the Monarch Server System. Use this option if you accidentally deleted some Monarch Server System files or 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 render your system unusable.

To repair a damaged installation

1. Run the MonarchServerInstaller.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.

![Repair Dialog Box](image)

3. When the repair is complete, the corresponding message will appear.

![Completed Message](image)

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 and files
1. Run the MonarchServerInstaller.exe file from your installation media, or use the Add/Remove Programs feature in the system's Control Panel. The Monarch Server 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

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 `MonarchServerInstaller.exe` to launch the Monarch Server Installation Wizard.

2. Click **Next**.

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

4. Accept the license agreement and click **Next**.

5. The upgrade process will begin. Follow the remaining prompts in the installer.

6. Once the upgrade is complete, restart the Monarch Server to ensure the latest version is active.

7. Proceed to the **Monarch Server v15.3 Single Server Installation Guide** for further details on using the updated version.
4. If you agree to the license terms, select **I accept the terms in the license agreement**, and then click **Next**.

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

6. Click **Next**.

**NOTES**

The existing database remains, and it is upgraded to the new version. The application directory remains.
7. The **Install Location** dialog box appears.

### NOTES

If the license includes the Automator component only, then the installation location step is skipped. If other components are installed, e.g., RMS and/or Content System, their available settings are displayed.

8. Click **Next**.

The **Service Credentials** dialog box appears.
9. 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**.

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

![Ready to Install](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.

11. The previous version of Monarch Server is removed.
Click **Finish**.

12. 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.

- **Open Client in default browser**: Select to open the Client application of the Monarch Server in the default browser.


- **Show installation logs**: Select to open the folder containing the installation logs.
13. 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 MonarchServerInstaller.exe to launch the Monarch Server Installation Wizard.

2. The License Agreement dialog box appears.

   Click Next.

3. 

   Monarch Server allows end users to retrieve data from reports, search for data in several reports simultaneously, and manipulate data for further analysis. This online system makes report data available more quickly, economically, and effectively than is possible with traditional hardcopy reports.
If you agree to the license terms, select **I accept the terms in the license agreement**, and then click **Next**.

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

   ![Upgrade dialog box](image)

   Click **Next**.

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

After installing Monarch Server, you can manually edit some of Clients applications’ parameters in the web.config file.

**Client**

The default path to the file is C:\inetpub\wwwroot\MSClient\web.config.

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

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>allowXformPdfView</td>
<td>Enable ES Style PDF View.</td>
<td>true</td>
</tr>
<tr>
<td>enableTrainingLink</td>
<td>Enable Lesson link.</td>
<td>true</td>
</tr>
<tr>
<td>ClientEndSessionRedirectUrl</td>
<td>URL to be opened upon clicking End Session link.</td>
<td></td>
</tr>
<tr>
<td>usePdfSubgroupHeaders</td>
<td>Enable Subgroup Headers in PDF export from Dynamic View.</td>
<td>true</td>
</tr>
<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>

**RMSClient**

The default path to the file is C:\inetpub\wwwroot\RMSClient\web.config.

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

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>userGroupName</td>
<td>Name of the group whose rights are applied to users when logging in to RMS Client.</td>
<td>RMSGroup</td>
</tr>
<tr>
<td>exportPDFInSameWindowEnabled</td>
<td>Enable export to PDF in the current window.</td>
<td>true</td>
</tr>
<tr>
<td>usePdfSubgroupHeaders</td>
<td>Enable Subgroup Headers in PDF export from Dynamic View.</td>
<td>true</td>
</tr>
<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>

Admin

The default path to the file is 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:

```xml
<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>