Altair Monarch
Installation and Activation Guide
Version 15.x
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Altair Monarch 15 Installation and Activation Guide
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Introduction

Altair Monarch, formerly Datawatch Monarch (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 is 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 Monarch installation and activation process.
System Requirements

To run Monarch successfully, we suggest that your system meet or exceed the recommended specifications. Note that administration rights and permissions are required to install Monarch. Running the application once installed, however, does not.

Monarch 32-bit vs. 64-bit Editions

Monarch is available as a 32-bit or 64-bit application. The Monarch 32-bit edition will run on 64-bit Windows operating systems. However, if you are running MS Office 64-bit edition, you MUST install the 64-bit edition of Monarch.

Minimum Requirements

- Windows 7 SP1 or later, Windows 8 or later, Windows 10, Windows 2008 Server R2 SP1, Windows 2012 Server or later
- 4 GB available memory
- 1.5 GB disk space (if installing on a machine with prerequisites)
- 5 GB disk space (if installing on a machine with no prerequisites or upgrading from .NET 4.5)
- Sufficient disk space for working with large data inputs
- Pentium 4 CPU
- Internet Explorer 8, 9, 10, or 11, Microsoft Edge, Mozilla Firefox, Safari 9+, or Google Chrome
- .NET Framework 4.7.2
- Microsoft Access Database Engine 2010 version 14.0.7015.100
- Microsoft SQL Server 2012 Express LocalDB SP1
Recommended Specifications

- Windows 10
- 8 GB available memory
- 1.5 GB disk space (if installing on a machine with prerequisites)
- 5 GB disk space (if installing on a machine with no prerequisites or upgrading from .NET 4.5)
- Sufficient disk space for working with large data inputs
- 2 GHz or faster processor
- Google Chrome
- .NET Framework 4.7.2
- Microsoft Access Database Engine 2010 version 14.0.7015.100
- Microsoft SQL Server 2012 Express LocalDB SP1
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

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

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

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

You must select a Monarch bitness to install before proceeding to the next screen. Note that you cannot install the 64-bit version of Monarch in a machine with the 32-bit version of Windows.

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

The third prompt asks you to specify a folder in which to store application files and whether the sample lesson files should also be installed.
When you click **Install** in the third installer prompt, the installation proper begins. This step may take some time.

![Please wait](image)

**NOTE: Installing Prerequisites**

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

If installation is successfully completed, the following screen is displayed.
The first time you run Altair Monarch, the Altair Monarch License Manager displays the following screen.

To be able to use Monarch after the trial period, you will need to activate it.
Installing and Using Monarch in a Citrix Environment

SYSTEM SETUP

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

SUPPORTED CITRIX VERSIONS

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

INSTALLATION

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

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

ACTIVATION

Citrix installations of Monarch are activated via license server.
DEPLOYMENT

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

- Create a Machine Catalog
- Create a Delivery Group

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

Creating a Machine Catalog

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

Steps:

1. Login to the server where Citrix Studio or Citrix 7.6/7.8 has been installed. Log in as an Administrator and make sure you have administrative rights before proceeding.

2. Right-click on **Machine Catalogs** in the tree on the left-hand pane and, from the menu that displays, select **Create Machine Catalog**.
The Machine Catalog Setup Wizard displays.

3. Click **Next** on this Wizard.
From the Operating System options that display, select **Server OS**.

4. In the Machine Management screen that displays, select **Another service or technology** if the machine for which a catalog to be created is not managed by Citrix Provisioning Services or Machine Creation Services (e.g., a virtual machine). Click **Next** afterward.
5. In the Machines screen that displays, click **Add computers** and, in the Select Computers dialog that displays, locate and select the Computer Active Directory account of Citrix Server. Click **OK** when you are finished. In the present example, **DWCH\XenAppTest01$** is added as a machine account. This machine has Monarch installed in it.

6. Select **Next**. The Catalog is now created. Give an appropriate name to this Catalog.
Once your catalog has been created, you can select it to view its properties.

Creating a Delivery Group

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

Steps:

1. From the tree on the left-hand page of Citrix Studio, right-click on Delivery Groups and, from the menu that displays, select Create Delivery Group.
2. The Create Delivery Group Wizard displays. In the Machines screen, select the catalog you created and specify the number of machines to add to the delivery group. Note that you can add several machine catalogs to a delivery group but a machine catalog can only be assigned to one delivery group. Click Next when you are finished.

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

The **Add Existing Applications** dialog launches.
5. Check the boxes for the applications you wish to add (e.g., Datawatch Data Prep Studio, Datawatch Monarch, License Manager, and Monarch Utility) and then click OK when you are finished. The list of applications should be automatically pre-populated by Citrix studio.

6. Click Next on the Desktops screen.

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

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

The Applications list will show a set of published applications, including Monarch.
LAUNCHING THE MONARCH APPLICATION

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

- Selecting the Citrix Receiver Client item from your desktop and logging in

- Specifying the web URL of Citrix Receiver and logging in as usual
The applications available to you, including Monarch, display on the Applications screen.

**USING THE USER PROFILE MANAGER (UPM) IN CITRIX SERVER**

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. In the machine in which Monarch has been installed, locate the ADM template file (C:\XenApp\x64\ProfileManagement\ADM_Templates\en) and copy the files to this folder.

2. Using your command prompt, run GEDIT.MSC.

3. Right-click on Administrative Templates and then select Add/Remove Templates.

4. In the Add/Remove Templates dialog that displays, select Add.
5. In the Policy Templates window that displays, paste the path you copied in Step 1. Click on the .adm file that displays and then select Open.

6. Close the Add/Remove Templates dialog when you are finished.

7. In the Local Group Policy Folder, go to Administrative Templates > Classic Administrative Templates (ADM) > Citrix > Profile Management > Profile handling.

8. Select Delete locally cached profile on logoff and in the middle pane that displays, select Edit policy setting. Ensure that this setting is Enabled.
9. Repeat the step above to enable **local profile conflict handling**.

10. In the Local Group Policy Folder, go to Administrative Templates > Classic Administrative Templates (ADM) > Citrix > Profile Management > File system > Synchronization.

11. Click on **Directories to synchronize**, and, in the middle pane that displays, select **Edit policy setting**. Ensure that this setting is **Enabled**.
12. Click the **Show** button. A list of directories to synchronize displays.

13. Add the following entries:
   - `AppData\Local\Citrix\Datawatch Monarch 15`
   - `AppData\Local\Local\Microsoft\Microsoft SQL Server Local DB\Instances\Datawatch.Engine`

14. Select **OK** when you are finished and then click **OK** once more on the **Directories to synchronize** window to close it.

15. Select **Files to Synchronize** from the Synchronization and opt to **edit its policy setting**.

16. Ensure that the policy is **Enabled**, and then click **Show** to display a list of files to synchronize.

17. Add the following entry:
   - `AppData\Local\Citrix\Datawatch Monarch 15\*`
18. Select **OK** when you are finished and then click **OK** once more on the **Files to synchronize window** to close it.
Activating Monarch

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

What Activation Means

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

The Altair Monarch License Manager

The main interface used to activate Monarch is the Altair Monarch License Manager (License Manager). The License Manager is launched the first time you run Monarch, during which you are asked how you would like to activate your install, or when you opt to deactivate your Monarch install.
In some cases, you may need to install two products on the same machine, e.g., Datawatch Modeler 14 and Altair Monarch 15. Altair Monarch License Manager supports activation for both products. In this case, when License Manager is launched, the following screen displays.

Simply select the product you wish to activate and then click **Next** to advance to the **License Information** screen.

Clicking the **Next** button on this screen launches the **Choose License Method** screen, which will allow you to select from a number of ways how to activate your chosen Altair product.
Activation Methods

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

- Activation through an **Activation Code** is the easiest way you can activate your Monarch install. Activation Codes are found either at the back of your Monarch Install CD or in the email sent to you confirming your electronic copy of Monarch.

- Activation through a **Monarch License Server** may be performed if you have access to a license file located on an Altair Monarch License Server. In this case, credentials to access this server must be provided.

- Activation through an **Altair License Management system** may be performed if you have access to a license file located on an Altair License Server. Similar to the previous option, credentials to access this server must be provided.

- Activation through **Knowledge Hub** may be performed if you are a Knowledge Hub user assigned the DESKTOP role.

- 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.

Activating Monarch Through a Firewall

In some cases, a firewall rule must be created to allow activation of Monarch using the License Manager with an internet connection (e.g., the firewall of your machine is activated). Note that the Activation Server for Monarch versions 11–14 is located at the following IP address: **184.106.60.184**. For Monarch versions 15+, the Activation server is located at **184.106.60.185**.

Using Monarch in Trial Mode

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

![Image of Monarch License Manager](image)

Supply the information required and then click **Finish**.

When using Monarch in trial mode, the following screen displays to remind you of how many days remain in your trial.

![Image of Trial Mode Reminder](image)

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

Once your trial period has expired, you must activate Monarch using any of the five options specified in **Activation Methods**. Note that you can activate Monarch even if your trial period has not expired.
Activating Monarch Using an Activation Code

The Activation code is also referred to as a License Code, License Key, or License Number.

It is an 18-digit code that you must specify in the **Activate License** screen of License Manager to activate Monarch.

Example: **287000-000215-542441**

This key should have been provided to you if your copy of Monarch was properly purchased.

![Activate License Screen]

Enter your Activation Code here.
CONFIGURING PROXY SERVER SETTINGS

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

Steps:

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

2. Ensure that the **Activate Altair Monarch using an Activation Code** button is selected and then click **Next**. The **Activate License** screen displays.
3. Select **Settings** to configure proxy settings.

The *Activation Settings* dialog displays.

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

Now you are ready to activate Monarch.
ACTIVATING MONARCH MANUALLY

Steps:

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

   ![License Manager Screen]

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

   ![Activate License Screen]
3. Manually enter the activation code provided to you and then click **Activate**.

Upon successful connection, the following screen displays.

![Activation Screen]

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

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

You may now run and use Monarch.

**ACTIVATING MONARCH OFFLINE**

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

**Steps:**

1. Launch the License Manager and then select **Activate Altair Monarch 15 using an Activation Code**. Click **Next** when you are finished.

2. In the Activate License screen that displays, enter your activation code into the field provided and then select the **Offline Activation** button to display the **Offline Activation** screen.
The following note displays.

3. Click OK to proceed with offline activation.
4. With your systems administrator Altair Support, follow the instructions provided in this screen to manually update your Monarch installation.

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

4.2 Click Generate.

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

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

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

A license is generated.

4.4 Copy and paste the generated license into the License field provided in the Offline Activation screen (Step #6). Click Activate when you are done.
Upon successful activation, the following screen displays.

5. Select **Finish** when you are done.
   
   You can choose to change the license method for your Monarch install by selecting the **Change License Method** button. Doing so returns you to the **Choose License Method** screen.
   
   You may now run and use Monarch.
   
   If you wish to register Monarch, go back to the Activation window and click **User Registration**.

**ACTIVATING MONARCH VIA E-MAIL OR PHONE SUPPORT**

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

**Americas**
Phone: +1 800 988 4739

**Europe, Middle East, and Africa**
Phone: +44 (20) 281 232995

**Asia Pacific**
Phone: +612 800 374 88

**Email**

[support@datawatch.com](mailto:support@datawatch.com)
Activation Using a Monarch License Server

Steps:

1. From the Choose License Method screen of the License Manager, ensure that the Connect to a Monarch License Server button is selected and then click Next. The License Server Connection screen displays.

2. Enter the name of the License Server you wish to connect to, as well as a valid instance name, into the corresponding fields. Ensure that your port is correctly specified.

If you are unfamiliar with the name of the server to which you should connect, select the dropdown button located to the right of the Server Name field and then click Browse for all to launch a dialog that lists all available servers in your network. Select the server name you wish to connect to and then click OK.
3. To enter your credentials and automatically connect to the License Server when Monarch Classic or Monarch Studio is launched, click the **Credentials** button located at the bottom left of the window.

   The Credentials dialog displays.

   ![Credentials Dialog](image)

4. Enter your username and password into the fields provided.

5. If you wish to connect to the License Server via Windows Authentication, tick this box.

6. Click **OK** to close the dialog.

   Note that if you do not provide your License Server credentials at this point, you will be asked to do so each time you launch Monarch Classic and Data Prep Studio.

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

   Upon successful connection, the following screen displays.
8. Select **Finish** when you are done.

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

   You may now run and use Monarch.

**USING MONARCH WITH MONARCH LICENSE SERVER**

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

![License Server Dialog Box]

To continue using Monarch, you will need to specify the username and password you entered into the **License Server Connection** screen.
Activation via an Altair License Management System

Altair Monarch can be activated by connecting to an Altair License Management System.

Steps:

1. In License Manager, select the Connect to an Altair License Management System option in the Choose License Method screen and then click Next.

The Altair License Server Connection screen displays.

2. At this point, you can activate your Monarch install in one of two ways:
   - Enter the path to a valid Altair License Server into the field provided.
   - Enter the path to a valid Altair License File into the field provided.

3. If you wish to enable license checkout (i.e., allow users to “check out” or “borrow” their license so that they can work with the Monarch applications offline), enter a maximum number of hours users can check out their license into the Advanced > Borrowing Duration field.

4. Click Connect when you are done.
Monarch is successfully activated.

Activation via Knowledge Hub

The **Connect to Knowledge Hub** method is used when licensing is performed via a user given the Desktop role in **Knowledge Hub**.

Steps:

1. Select the **Connect to Knowledge Hub** option in the Choose License Method screen and then click **Next**.
2. Fill out the following fields of the **Knowledge Hub Connection** screen.
   - Name of the server to which you will connect. Use the form http(s):URL.
   - Port

3. Click **Connect**.
   You will be connected to the Knowledge Hub Server and the required license will be granted.
4. When you launch Monarch Classic and Data Prep Studio, the following dialogs display:

![Dialogs](image)

5. Provide a valid username and password to connect to Knowledge Hub. If you wish to save your credentials so that you do not need to enter them the next time you use these applications, tick the box marked **Save user credentials** and then click **OK**.

### Activation Using a Volume License Key File

**Steps:**

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

![License Manager](image)
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.

![License Information Screen](image)

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

   You can choose to change the license method for your Monarch install by selecting the **Change License Method** 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 three ways you can deactivate your copy of Monarch:

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

Deactivating Monarch Using the Monarch License Manager

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

Steps:

1. Launch the License Manager. The License Manager initially displays the License Information screen.
2. Select Deactivate Altair Monarch 15 using an Activation Code to display the Deactivate License screen.
3. The Activation Code you used to activate Monarch with automatically displays in the Activation Code field. Select Deactivate. A dialog box will inform you that Monarch has been successfully deactivated.

Deactivating Monarch Offline

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

Steps:

1. Perform Steps 1 and 2 of the previous section to launch the Deactivate License screen.
2. Click the **Offline Deactivation** button on this screen.

The following note displays.

![Offline Deactivation screen](image)

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

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

3.1 Open the **deactivation page** of the activation website by clicking the link provided in Step 2 of the Offline Deactivation screen.
3.2 Click **Export** on the *Offline Deactivation* screen to display a **Deactivation Certificate**. This certificate is displayed in the text field of Step 4.

3.3 Copy the generated deactivation certificate by clicking the **Copy** icon and then paste it into the *De-Activation Certificate* field of the Nalpeiron webpage.

3.4 Check the appropriate box to confirm your having read and agreed to the terms and conditions of Monarch deactivation and then click the **Deactivate License** button.

The license will be deactivated and available for use on a different machine.
Deactivating Monarch via E-mail or Phone Support

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

**Americas**
Phone: +1 800 988 4739

**Europe, Middle East, and Africa**
Phone: +44 (20) 812 32995

**Asia Pacific**
Phone: +612 800 374 88

**Email**
support@datawatch.com
Upgrading Monarch

Monarch upgrades may be considered a minor upgrade, an example of which could be installing Monarch version 14.3.2 after installing Monarch version 14.1, or a major upgrade, an example of which could be installing Monarch 15 after initially installing Monarch 14.

Steps:

The upgrade process may generally be summarized as follows:

1. Determine what type of upgrade you wish to implement. You will not require a new license or activation code when making minor upgrades. However, when making a major upgrade, a new license or activation code is required.

2. If you wish to perform a major upgrade, obtain a new Monarch license or activation code. To do so, open a Licensing and Activation/Deactivation ticket via support.datawatch.com and request for a new one. Remember to include your old activation code or attach your old license file to your ticket. Our support staff will initiate the process of generating a new code or license file for you and guide you through the rest of the upgrade process.

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

3. Download a newer version of Monarch from the links provided in the Support portal.

4. Run the installer and activate your copy of the application as usual.

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

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

- Uninstall the old version and then install the new application. This option is preferred when performing a major upgrade.

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

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

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

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

![Contact Altair Sales](image)

Contact details for Altair Sales display.