

RELEASE NOTES

Monarch Server 2021.0

Content Server, Automator, Report Mining Server

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1. Welcome

Welcome to Altair Monarch Server major release 2021.0.

This release is generally available from January 24, 2022, following on from the previous 2020.0 released in November 2020.

This document provides an overview of the new features and enhancements provided by Monarch Server in the 2021.0 release. For information on installation and upgrade procedures, as well as details on supported platforms and software requirements, see the separate installation guides that are provided with this release.

NOTE: It is strongly recommended that at minimum, Support/Altair Professional Services is involved with reviewing any upgrade activity prior to the same being carried out. A full backup of the existing deployment must be made and verified before commencing the same to enable regression should it be required. Without a backup, data loss is unavoidable. Altair recommends utilizing our Professional Services to assist you with planning or completing an upgrade activity to minimise downtime, disruption, and risk.

Altair highly recommends upgrading to the latest available release in order to make use of the latest functionality and feature enhancements, improvements in performance and stability, and to be best prepared for the next release.

Monarch Server 2021.0 is compatible with Monarch Complete/DPS 2021.0 and earlier.

- The full version of Datawatch.SDK, which is used in the build, is 17.0.0.11792.
- The full version of Datawatch.DataPrep.Engine, which is used in the build, is 17.0.0.29635.

2. Software Support

Altair will support the current major version of a product release, and one major version behind the latest product version (N -1).

This means supported versions at the time of this Altair Monarch Server release will be 2021.x and 2020.x.

Support includes:

- Response to questions about using product features
- Operational questions
- Guidance on installing new updates, service updates, and patch fixes (Altair strongly suggests that Altair Knowledge Works Professional Services be involved with your upgrades and patches)
- Investigation into operational failures and/or issues

3. Access to Software Updates

Customers with an active Maintenance Plan are automatically provided access to the latest product releases via the Customer Support Portal (<https://community.altair.com/community>). This includes major software releases and service releases for updates and fixes.

3.1. Release Overview

Altair Monarch Server is a deployment platform for the Monarch based server products within the Knowledge Works product set. The server-based platform is scalable from a single-server implementation to a multi-server web distributed system, providing failover, scaling and pooling capabilities accordingly.

Altair Monarch Server consists of 3 products:

- Content Server
 - Traditional Enterprise Server

- Filing, storage, retrieval
- Automator
 - Traditional Data Pump Engine
 - Project Editor
 - Visual Process Editor
- Report Mining Server (RMS)
 - 'Overlaying' Content Server functionality on top of an existing Content Management System

Altair Monarch Server 2021.0 continues the following:

- To simplify providing a centralized, browser-based report warehouse with rich data extraction/manipulation/export capabilities
- To enable the automation of data preparation based on Altair Monarch Workspaces and Models
- To enhance the user experience of existing Content Management Systems by enabling richer interactions with compatible report content, enabling rich data extraction/manipulation/export capabilities

Enhancements in the general user experience are added to process definitions, and improvements are made for data connectivity and exports.

Additionally, a few general enhancements are included in this release relating to upgrades and for improved performance.

Finally, a Veracode SCA Scan for vulnerability issues was run to ensure that no significant risks for security breaches were apparent and appropriate remedial work undertaken to address issues accordingly.

4. Release Benefits

This document is divided into the major areas where improvements and additions of new features provide significant benefits to the users of Altair Monarch Server 2021.0.

A summary of changes / new features is as follows:

- Installation and upgrade
- Altair Monarch Complete SDK / Engine alignment
- Reduced risk for security breaches
- New features
- Bug fixes and improvements

4.1. Installation and Upgrade

Deprecation of older and support of newer technologies are reflected in this release of Altair Monarch Server 2021.0:

- Windows Server 2016 and 2019 with .NET Framework 4.7.2 is supported;
- Compatible application database engines are SQL Server 2016 and 2019 (SQL Express Editions are not viable for Content Server feature deployments);
- For relevant deployments, SQL Server LocalDB 2017 is supported;
- Previous Access Database Engine 2010 prerequisite is replaced with Access Runtime 2013;
- Lower version of Windows Server, SQL Server, .NET Framework, and LocalDB are no longer supported. Future versions of these components may have support provisioned as part of future minor / patch releases also. Any queries in this regard can be directed to Altair Knowledge Works Support (<https://community.altair.com/community>).

4.2. Altair Monarch Complete SDK/Engine alignment

Altair Monarch Complete 2021.0 was released in July 2021.

To align with the desktop tools, Altair Monarch Server 2021.0 makes use of the Altair Monarch Complete 2021.0 engines accordingly (also referred to as the Monarch Classic and Data Prep Studio SDKs).

It is important to ensure desktop and server components are of a common version to avoid issues with models/projects/workspaces generated in the desktop product and subsequently used in server product(s). The version of the Engine/SDK is provided as part of the Altair Monarch Server minor releases and patch release notes. These should be checked to ensure commonality between the products accordingly. Altair Knowledge Works Support can provide further assistance if required (<https://community.altair.com/community>).

4.3. Reduced Risk for Security Breaches

Regular review of the software eliminates the risk to have vulnerabilities exposed. The code scans performed on Altair Monarch Server permit deployments to more easily comply with the major regulatory requirements and industry standards.

A vulnerability code scan was performed on Altair Monarch Server 2021.0 using Veracode Software Composition Analysis (SCA), which is considered one of the most effective ways to eliminate software flaws. Relevant issues in Altair Monarch Server 2021.0 that were found and classified as high or medium are fixed (DST-2625).

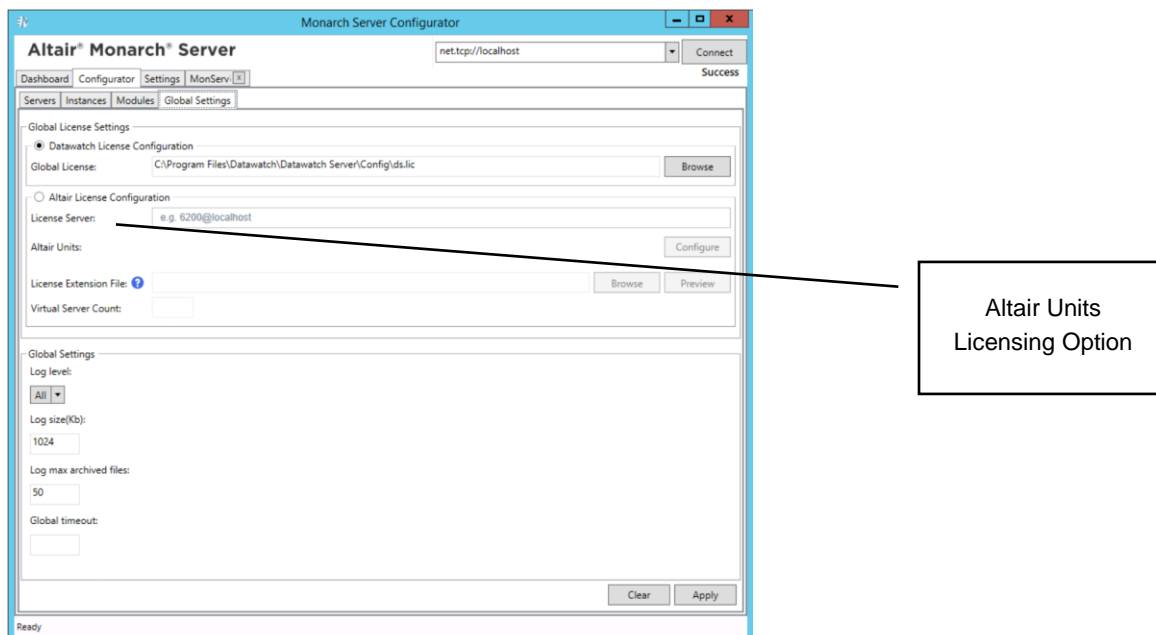
4.4. New Features

A summary of major new features is as follows.

4.4.1. Altair Units Licensing

Prior to 2021.0, Monarch Server licensing required a customer-specific license file to enable deployment.

With 2021.0+, it is possible to utilize Altair Units (<https://www.altair.com/altair-units/>) to deploy and utilize the Monarch Server features accordingly.



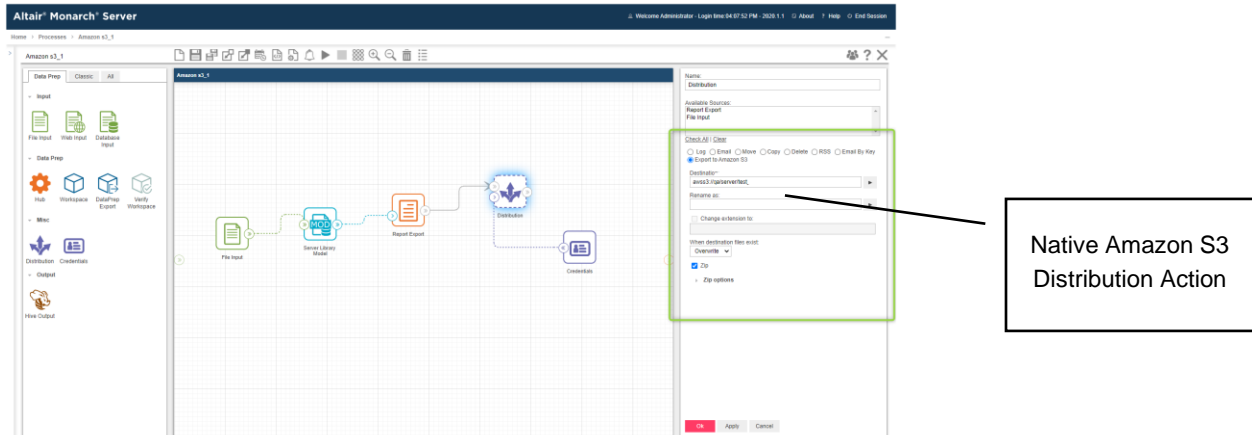
Existing Altair Units Customers can refer to the Monarch Server 2021.0 documentation for information regarding implementing licensing to this mechanism. Customers not familiar with or not using Altair Units currently should refer to their Account Manager to discuss their interest further.

4.4.2. Monarch Classic Catalog Improvements

Customers processing large volumes of inputs via a model can now increase the number of catalog databases used to increase performance particularly with large report/high processing volume and frequency scenarios. Prior to this release, the default value was 3; this is now configurable to allow for more efficient processing of Monarch.SDK-based operations (i.e., use of models/projects).

4.4.3. Visual Process – Export to Amazon S3

Prior to Monarch Server 2021.0, distributing exports to Amazon S3 was only possible with a script or functionalities external to Monarch Server. It is now possible to specify a native distribution action to avoid scripting or reliance on external logic to achieve the same.



4.5. Bug Fixes and Improvements

Altair Monarch Server is maintained in a cumulative manner. The latest patch will also include all items from previous patches, resulting in only the latest patch being required to benefit from the newest as well as previously addressed items.

Issues identified in one supported version are reviewed to see if a fix is required to other supported versions also; for example, an issue in 2020.x might result in the same fix in 2021.x or vice versa, assuming the issue/resolution is common to both.

Items addressed as part of this release are as follows:

4.5.1. General Fixes/Improvements

Category	Ref	Monarch Server Issue Summary
Bug	DST-2672	Web.Installer.exe does not start
Bug	DST-2674	Error regarding 7z.dll occurs while web installing
Bug	DST-2711	Single Installer: server should be not restarted after Repair
Improvement	DST-2482	DOC: Integrate Configurator Guide into Installation Guides

Category	Ref	Monarch Server Issue Summary
Improvement	DST-2510	Doc: Improve Introduction to Content Server User/Admin Guides
Improvement	DST-2517	Replace 'Access Database Engine 2010' prerequisite with 'Access Runtime 2013'
Improvement	DST-2570	Database upgrade (15.3.9 to 16.0+) producing several errors while reporting the "Database was upgraded successfully"
Improvement	DST-2597	SDK: Version visible of UI
Improvement	DST-2613	Update SDK and Engine to 17.0
Improvement	DST-2621	Whitelisting of domains does not work for Automator and RMS. This should be applicable to all features (Content, Automator, RMS)
Improvement	DST-2683	Doc: Describe the ability to use Altair Licensing
Improvement	DST-2684	DOC: SDK: Version visible of UI
Improvement	DST-2701	Doc: Add information about a new key in the config.xml file
New Feature	DST-2508	Support "hosted" and regular HWU licensing
New Feature	DST-2602	Proxy Catalog Management DB settings

4.5.2. Automator Fixes/Improvements

Category	Ref	Automator Issue Summary
Bug	DST-2194	VPD: new added items are inactive when, after reconnecting items, you cancel attempt to overwrite the process
Bug	DST-2393	Ability to replace Excel file reference property in Visual Process Designer
Bug	DST-2444	VPD: Alert "SystemAlertProcessElementFailed" - "Verify Workspace" is shown twice

Category	Ref	Automator Issue Summary
Bug	DST-2448	It's impossible to open the log of the standard process if you used the Database fields checkbox in the Model verifications section
Bug	DST-2530	CLONE - UI - Chrome, Edge: AssignControl component - page seek icons are broken
Bug	DST-2541	Unable to use inputs with very long passwords
Bug	DST-2553	Automator has inconsistent behavior on exporting nulls to SQL based on field data type
Bug	DST-2565	The default size for an empty 'Fetch Database' dropdown list is too small.
Bug	DST-2577	Check Input node inconsistent behavior
Bug	DST-2579	Email by Key has GUI issue editing recipients
Bug	DST-2580	User is kicked out of visual process editing mode without saving while clicking on "Time intervals" macro
Bug	DST-2583	Macros functionality is not implemented to export to delimited text file in Summary export
Bug	DST-2628	CLONE - Unable to edit path to delimited file (csv) when loading workspace in the server library
Bug	DST-2637	CLONE - DataPrep Export object fails when the workspace object file name is set to a URL.
Bug	DST-2644	CLONE - Schedule menus for Standards and Visual processes not getting displayed causing MSAdmin application unresponsiveness and other users accessibility.
Bug	DST-2646	CLONE - "Table or View not found" alert is displayed when user tries to change database and load tables in SQL plugin.

Category	Ref	Automator Issue Summary
Bug	DST-2651	When multiple Excel files are configured in database object (e.g. File*.xlsx), the DPS Export cannot export the summary.
Bug	DST-2652	Values of database and table are reset in SQL plugin when "Ok" button is clicked before query is updated.
Bug	DST-2656	VPD: Load Plans are not available for Workspace with pinned tables.
Bug	DST-2712	"Could not load file or assembly" error appears when DataPrep exporting from Salesforce.
Improvement	DST-1812	Add ability to ignore global alerts for Standard processes.
Improvement	DST-2082	Visual process does not have "Excel Advanced Features" options available when exporting to table or summary to excel files. Add Pivot option for VPD.
Improvement	DST-2196	Enhance bulk edit to find and replace text in the Visual Process script.
Improvement	DST-2316	API: Automator User and Automator Light Users should only be able to run processes that they have permissions to.
Improvement	DST-2357	Server Library: add Excel Engine drop-down to allow the user to change Legacy/Modern values.
Improvement	DST-2476	Update SQL Express from 2014 to 2019 in Single Server Installer.
Improvement	DST-2506	Doc: Describe the ability to use macros in a web input of visual process.
Improvement	DST-2511	Database Input node is unable to retrieve table from Excel Input file when using [date.-1d.yyMMdd] macro.
Improvement	DST-2518	Some schedules from Week 53 of Year 2020 do not work as expected in Automator version 2020.

Category	Ref	Automator Issue Summary
Improvement	DST-2524	Add the ability to specify a password for external lookup from a password-protected Excel file.
Improvement	DST-2526	CLONE - DOC: add Note for Monitoring.
Improvement	DST-2531	Add a warning/error when selecting a past date and time in an Automator one-time schedule.
Improvement	DST-2545	Doc: add information about the ability to use password-protected Excel files when using Modern Excel engine.
Improvement	DST-2546	Doc: add information about the new feature for workspace with Excel Worksheet Design Provider Type.
Improvement	DST-2576	Upgrade "Google Analytics" form in Monarch Server in accordance with DPS.
Improvement	DST-2604	UI. Remove KHub integration.
Improvement	DST-2623	There is no way to modify workspace SQL plugin credential information with a customer query and "OK" to accept the results.
Improvement	DST-2629	Doc: Improve description for DataPrep Input/Export Files.
Improvement	DST-2632	Provide an ability to specify encoding settings at CSV export type for data prep export.
Improvement	DST-2648	CLONE - When using MSOLEDBSQL driver, Bulk Behavior is greyed out.
Improvement	DST-2649	CLONE - Unable to change SQL Server host name using Bulk Editor if it has previously been changed from the Host specified in the Workspace.
Improvement	DST-2698	Doc: Remove information about integration with KHub
Improvement	DST-2699	Doc: Update API documentation.

Category	Ref	Automator Issue Summary
Improvement	DST-2516	DOC: add a detailed description with examples for Verify Workspace Logic.
Improvement	DST-2615	Doc: Describe ability to ignore global alerts for Standard processes.
Improvement	DST-2618	Doc: Describe ability to add Pivot tables to visual processes.
Improvement	DST-2619	Doc: Describe the ability to specify a password for external lookup from a password-protected Excel file.
Improvement	DST-2657	Doc: Describe ability to change encodings while DataPrep exporting to .csv.
Improvement	DST-2659	Doc: Describe ability to change engine (Legacy/Modern) for Excel load Plan in Workspaces in the Server Library.
Improvement	DST-2661	Doc: Add Whitelist functionality to Automator.
Improvement	DST-2662	Doc: Describe the ability of validation of SQL plugin settings.
Improvement	DST-2663	Doc: describe the ability of editing scripts for Standard and Visual processes with the help of Bulk Edits
Improvement	DST-2675	Doc: Describe the ability to export to Amazon S3.
Improvement	DST-2682	Doc: Add the ability to choose time intervals.
Improvement	DST-2692	Doc: Automator Factsheet for v.2021.0
Improvement	DST-2703	VPD: DataPrep Export to Access is failed
New Feature	DST-2306	Ability to export to Amazon S3 server.

4.5.3. Content Server Fixes / Improvements

Category	Ref	Summary
Bug	DST-2110	CLONE - Ingestion fails with "The given key was not present in the dictionary" error when Report security rules are configured on a document type.
Bug	DST-2178	ESStyle-PDF views rendering differently after selecting a PDF export from the Document Search tab, viewing the document, and then selecting a ESStyle-PDF view.
Bug	DST-2311	Pre-Mine failing withing the filing or maintenance process for specific model with error "Sequence contains more than one matching element".
Improvement	DST-1987	Provide available index id in a dropdown list for the available indexes when mapping index model indexes to a monarch model indexes.
Improvement	DST-2001	CLONE - Filing task fails not logging correct failure status and does not provide useful information on cause of the failure.
Improvement	DST-2016	CLONE - Customer requested for the Document search result list to auto-resize and sort document "State" column in MSCClient.
Improvement	DST-2071	CLONE - CS: Add ability to hide "Working List" by choice by using the configuration in MSAdmin.
Improvement	DST-2265	CLONE - Improve memory management for GetEsStylePdf method.

4.5.4. Report Mining Server (RMS) Fixes / Improvements

No RMS-specific items in this release.

5. Known Issues

The following known issues will be fixed in a subsequent patch on Altair Monarch Server 2021.0.

- Updating of Monarch Classic/DataPrep Engines/SDKs to 2021.1
- [DWCHIS-3038) - Runtime database is not cleaned up on a large batch run increasing the size of the database with every run potentially affecting performance when using verify functionality with Standard Processes
- (DWCHIS-3040) – RMSPlugin for ICN does not work with ICN 3.0.10+

Monarch Server 2021.1 is targeted to be available in Calendar Q1 2022.

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