1 LAUNCH DATAWATCH MONARCH SWARM
ACCESS THE APPLICATION ANYWHERE, ANYTIME.

To run Datawatch Monarch Swarm, enter the correct URL into the address bar of your browser and then log into the application using your given credentials. Upon successful login, the application displays the Monarch Swarm Library.
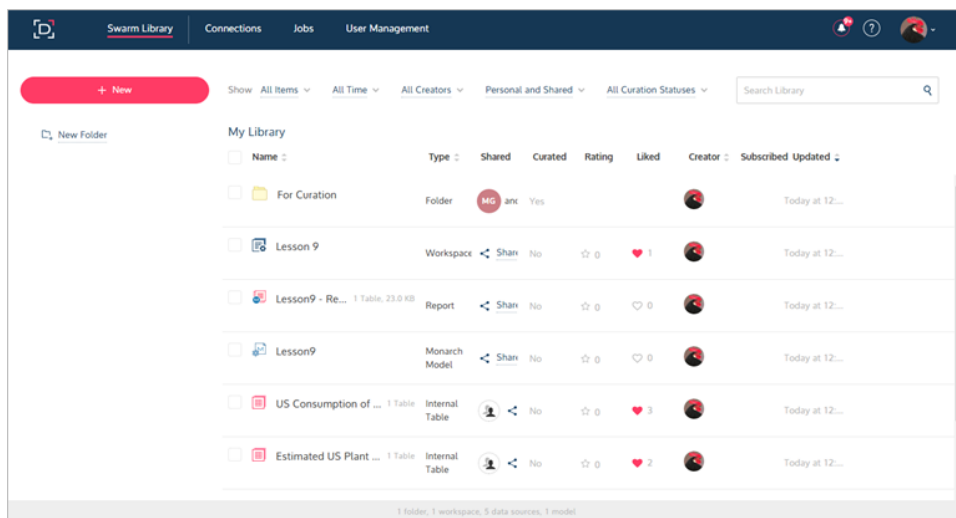
From this page, you can access and share available workspaces, models, and data sources, create new connections to import/export tables, schedule jobs, and perform user management activities.

2 OPEN A WORKSPACE OR DATA SOURCE
SEAMLESS COLLABORATION BETWEEN DATA PREP STUDIO AND MONARCH SWARM.

Workspaces may be imported from Data Prep Studio or a local environment.

Click **Swarm Library** on the Monarch Swarm menu to view a list of workspaces, models, and data sources you can work with. Select any workspace to open it.

Monarch Swarm was developed for non-technical business analysts in small to mid-size organizations with a need for easy connection to any data source, uncomplicated tools to explore and prepare data, capabilities for automation of extraction and processing, distribution of output to any format and visualization, and governance and auditing of how data is consumed.

READ MORE
Online Help: About Workspaces
Online Help: Working with Workspaces
Online Help: About Data Sources

Monarch Swarm allows users to access data sources and use them in workspaces. Click **Swarm Library** > **Data Sources** or > **Models** to view a list of data sources and models you can work with.

To add a new data source, click the **+ New** button in the library menu. You can drag and drop report files into the workspace, add a data source thru a web link, or create new connections to import data from external data sources.
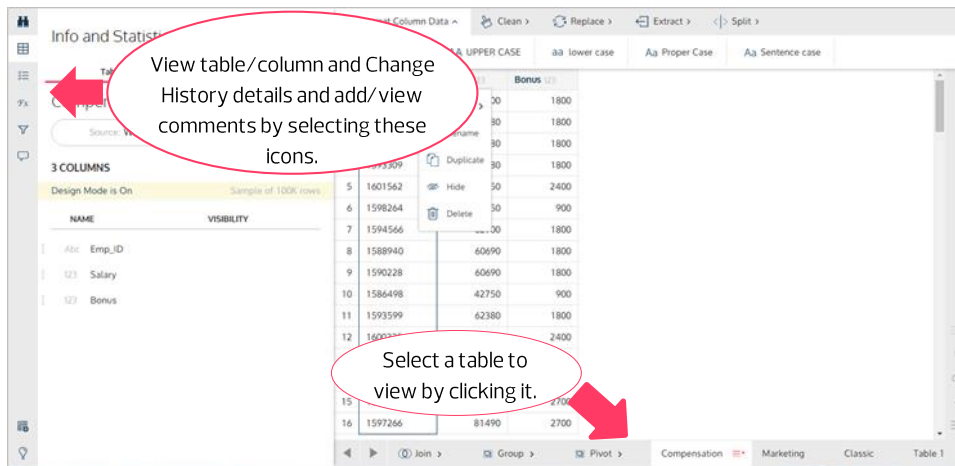
Like and subscribe to data sources and workspaces to receive updates on these objects. You can also follow specific users to receive notifications on what they're working on.

View your dashboard by clicking on the Datawatch logo on the top-left corner of your screen.

3 MODIFY YOUR WORKSPACE WITH POWERFUL DATA PREPARATION CAPABILITIES
HARNESS DATA PREP STUDIO'S CAPABILITIES TO PREPARE CLEAN ANALYSIS–READY TABLES.

Utilize the data preparation capabilities of Data Prep Studio to transform and clean your data. Review column statistics and Change History details and add comments by clicking on each of the tabs located on the left-hand pane of your workspace.

View table/column and Change History details and add/view comments by selecting these icons.

Select a table to view by clicking it.

Monarch Swarm features built-in data quality and preparation capabilities with complete transparency on all data manipulation tasks.

Comments allow information workers to following the activities of peers as well as leverage shared and curated resources. Thus, these workers can be more effective at sourcing and interpreting information and increase their skill sets rapidly as they go about their daily tasks.

Users can, among other operations:

- Change data types and text cases
- Remove specific characters and leading, consecutive or trailing spaces
- Replace specific characters
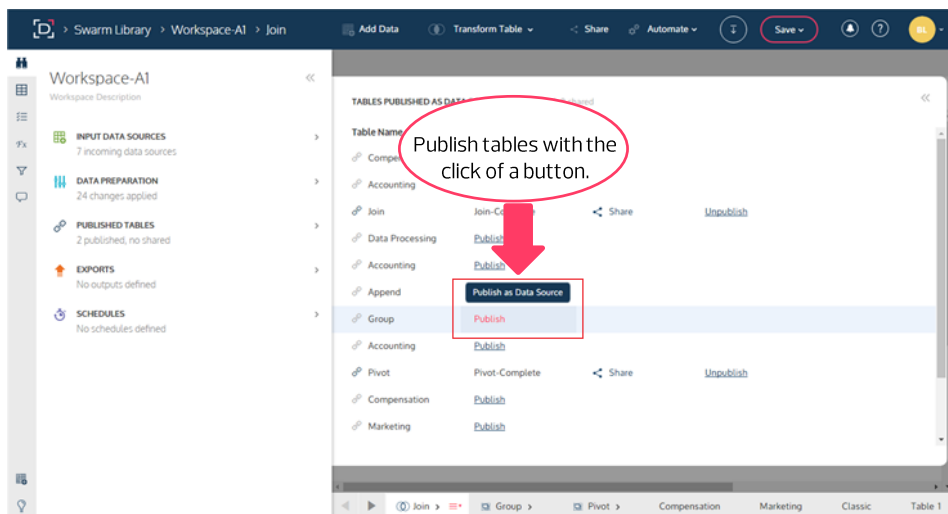- Extract specific characters and strings
- Split strings

READ MORE
Online Help: Working with Tables
Online Help: Data Prep Operations

4 PUBLISH ADJUSTED TABLES AS NEW DATA SOURCES

PUBLISH CLEAN TABLES AS NEW DATA SOURCES, READY FOR SHARING OR FURTHER TRANSFORMATION IN DATA PREP STUDIO.

Tables modified in Monarch Swarm may be published as new data sources. You can save one or all of the tables included in the workspace.

Publish tables with the click of a button.

A dialog displays when you click the **Publish** link. In this dialog, enter a name for the data source, your preferred location, and an optional description and then click **Publish**. Published tables may be used in other workspaces, shared with other Monarch Swarm users, or opened in Data Prep Studio for further transformation and analysis.
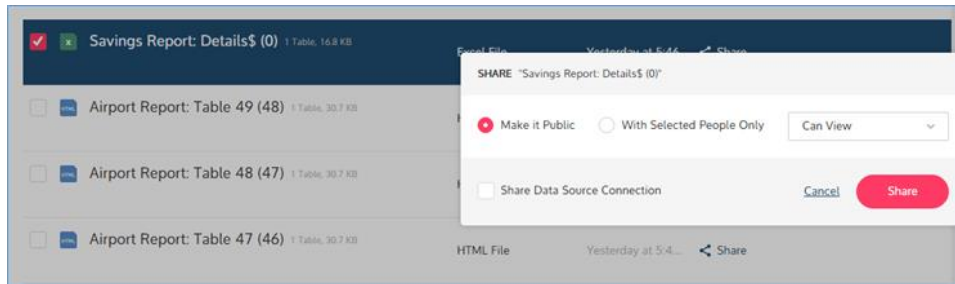
READ MORE
Online Help: Publishing Tables

5 SHARE YOUR DATA
COLLABORATE WITH OTHER MONARCH SWARM USERS.

Share prepared, managed data to achieve true enterprise collaboration and agility, resulting in better and faster business decisions.

Tables may be shared with everyone with access to Monarch Swarm or to specific users, and shared privileges may be revoked at any time necessary.
When shared, tables may be:

- Viewed
- Edited
- Edited and shared

Monarch Swarm leverages the concept of collaboration by providing a central platform where users can learn from each other and be more productive and better connected as they source, cleanse, and prepare data for analytical and operational processes.
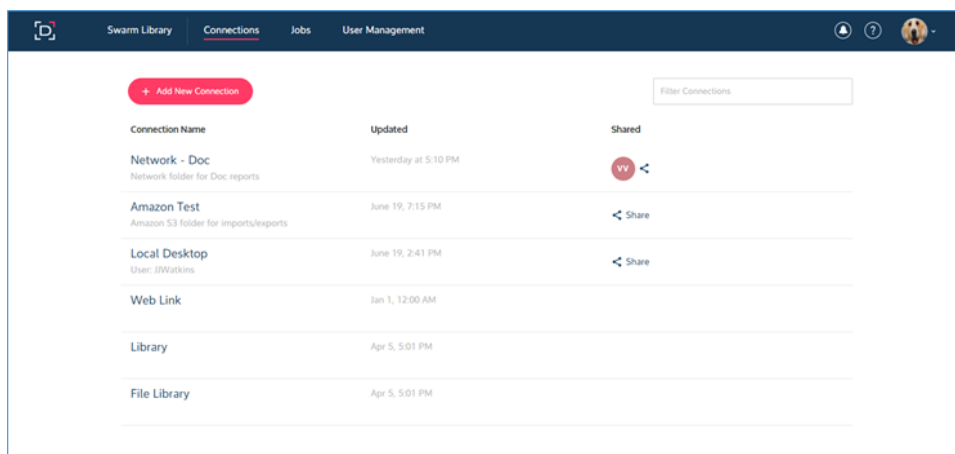
READ MORE
Online Help: Sharing Data Sources

6 CREATE CONNECTIONS AND EXPORT TO THEM
IMPORT AND EXPORT TABLES FROM AND TO THE LIBRARY, A SPECIFIC FOLDER IN YOUR DESKTOP, IBM WATSON ANALYTICS, COGNOS ANALYTICS, NETSUITE, SALESFORCE, OR OTHER RELATIONAL DATABASES.

Connections to IBM Watson Analytics, Cognos Analytics, Amazon S3, Salesforce, Netsuite, Google Adwords, Google Analytics, and relational databases, among others, may be specified in the Connections page.

Once you're done preparing your data, you can easily export these to several formats, including Excel, CSV, or other analytic tools.
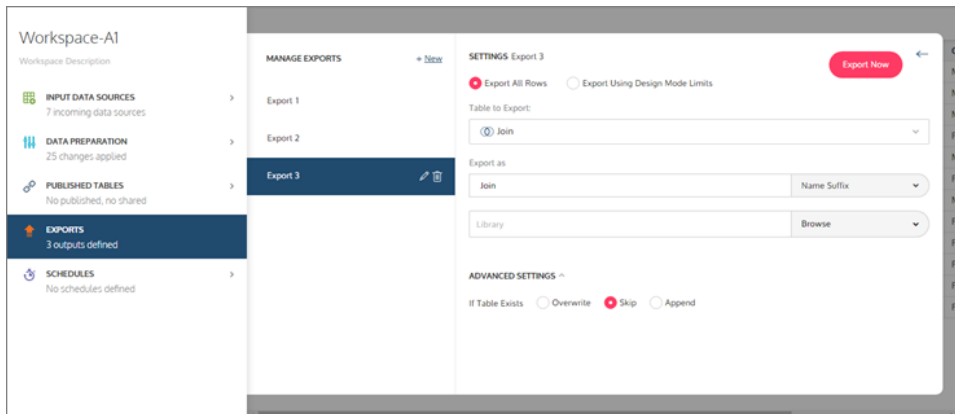
READ MORE
Online Help: About Exports
Online Help: About Connections

To export tables to locations other than the Monarch Swarm library, a connection to a third-party application must be established. This connection may be easily set up in Monarch Swarm by providing the connection type you desire, a connection name, and other pertinent information. Click **Save** to store these details.

To export tables to Amazon S3, for example, click on **Exports** on the left-hand pane of your workspace or select **Automate > Export**. The Exports screen displays. Use this screen to define your export.

In the **Where** field, select the **Browse** button, select the **Amazon S3** connection you created and then click **Open**.
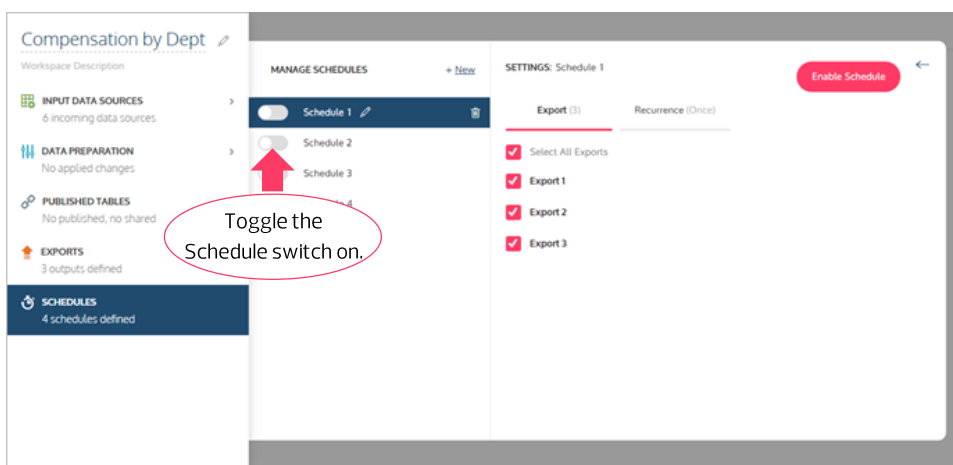
Click **Advanced Settings** to specify further details for your export. Click **Export Now** to export your table immediately.

7 SCHEDULE EXPORTS
SCHEDULE EXPORTS TO RUN AUTOMATICALLY AS OFTEN AS NECESSARY.

Monarch Swarm allows export scheduling so that your data reach intended recipients as soon as they are processed and analysis-ready. Note that scheduling requires the existence of at least one pre-defined export.

Create an export schedule by selecting **Schedules** from the left-hand pane of your workspace or clicking **Automate** > **Schedule**. In the **Manage Schedules** panel of the Schedule Definition screen, click **+ New**.
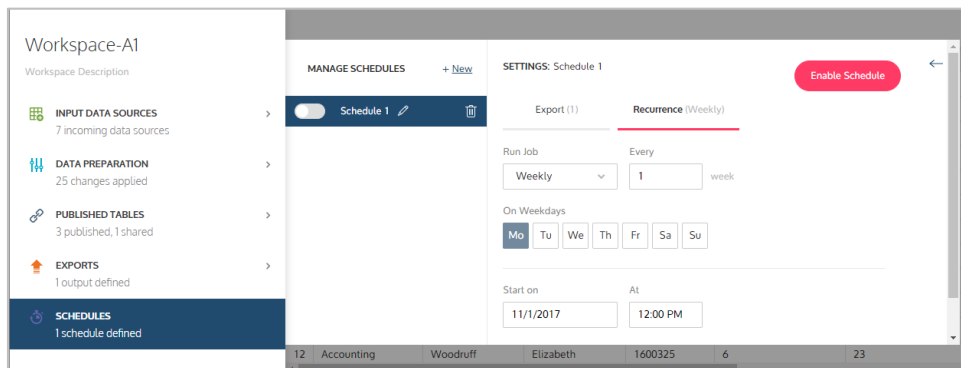

READ MORE
Online Help: About Schedules
Online Help: Creating New Schedules

You must select a specific export to run or opt to run all created exports.

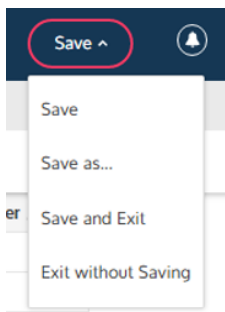You must also specify a specific time and frequency to run the export.

If you opt to run an export weekly, for example, you must specify which day of the week it must be run, what time, and when exporting activities must be stopped.

8 SAVE YOUR WORKSPACE
PRESERVE YOUR WORKSPACE FOR FUTURE COLLABORATION.

Save your work by selecting the **Save** drop-down on the upper right-hand corner of your workspace. Choose one of the options provided.

■ NEXT STEPS

- Use Monarch Swarm's comprehensive documentation to help you learn more about its capabilities. Online help is available at http://docs.datawatch.com/swarm/desktop.
- Explore how self-service data prep and visual discovery can bridge the IT and business gap. Visit the Datawatch site or call Datawatch for more details.