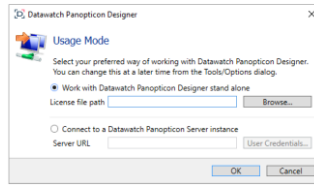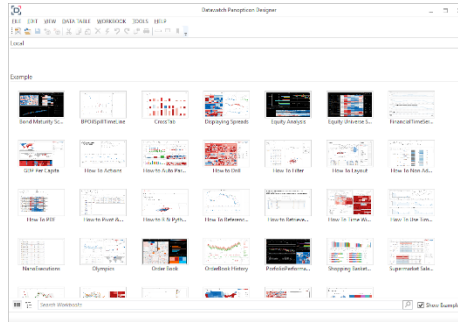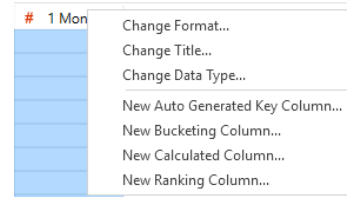## 1 OPEN PANOPTICON DESIGNER

1. Select: *Work with Datawatch Panopticon Designer stand alone.*

2. Click OK.

3. Activate if required.

Panopticon Designer opens in standalone mode, and displays the *Datawatch Panopticon Designer* start up screen.
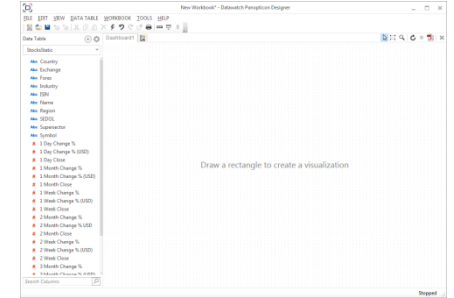
2 CREATE A NEW WORKBOOK AND CONNECT TO DATA

To create a new workbook, select the **New Workbook** icon on the toolbar. This opens the *Connect to Data* dialog. Select a data source to create a new table.

EXAMPLE: EXCEL DATA SOURCE

1. Select *MS Excel* in the *Connect to Data* dialog. Browse to an Excel spreadsheet and select it.

2. Select the sheet and Data Access Method to use.

3. Define Initial Settings.

4. Click OK.

3 DEFINE/REFINE YOUR DATA TABLE USING SELF-SERVICE DATA PREP

1. Click ⊕ beside a Data Source (panel b) to add more data sources to the table.

2. Click ⋯ beside the Data Table name (panel a) and then *Settings* to modify Data Table settings.

3. Click ▾ beside a column name (panel c) to display actions you can carry out on a column.

   For instance, you can change the data type or format, or create new computed/bucketing/ranking columns. Actions depend on the data type.
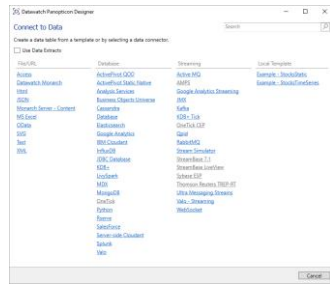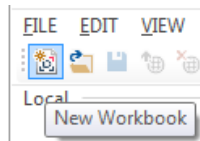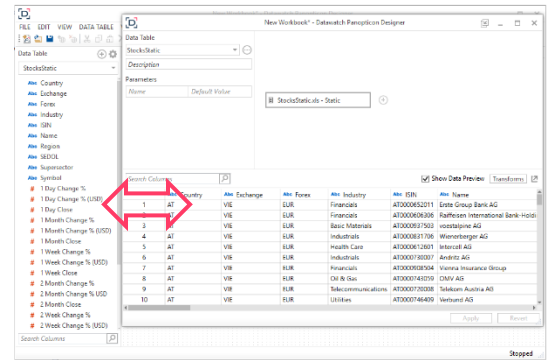
   Change Format...
   Change Title...
   Change Data Type...
   New Auto Generated Key Column...
   New Bucketing Column...
   New Calculated Column...
   New Ranking Column...

4. Click **OK**.

   You are brought to the main Workbook interface, ready to add a visualization.
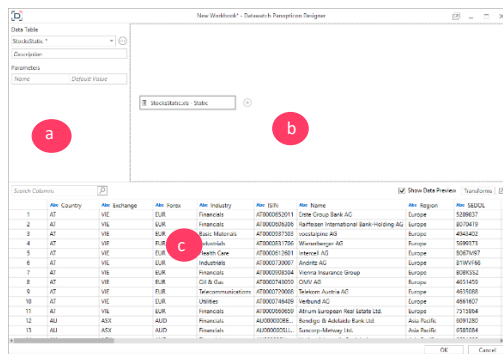
5. At any time, you can select **Data Table > Edit** from the main menu to display Data Prep and edit the Data Table. You can even select (pop-out) in Data Prep to view both the Workbook and Data Prep simultaneously. Edits to one are reflected in the other.

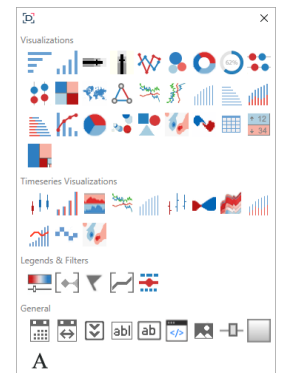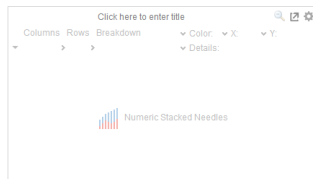6. At any time, click the **Save in Workbook** icon on the toolbar to save your work.
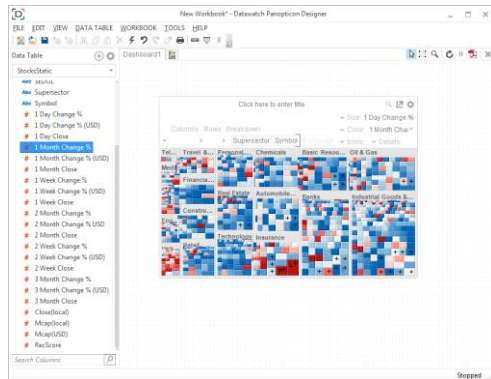
4 ADD A VISUALIZATION

1. Draw a rectangle in the dashboard canvas to create a visualization. The *Parts* dialog displays with the available visualization parts.

2. Select a visualization. You will see a skeleton image of the Visualization on the canvas.

3. Drag columns from the Data Table (on the left panel of the Workbook) to the Visualization to define the hierarchical breakdown and visualization dimensions (e.g., color, X, Y, Size, and so on).
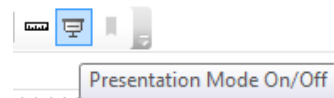
5 ENHANCE YOUR VISUALIZATION

ADD LEGENDS

1. Draw another rectangle and then select the **Color Legend** icon in the *Legends & Filters* section of the *Parts* dialog.

   You will see a skeleton image of the Legend.

2. Click and drag the **Drag to connect** button to the Visualization.

ADD FILTERS

1. Draw another rectangle and then select click the **Filter Box** icon in the *Legends & Filters* section of the *Parts* dialog. You will see a skeleton image of the Filter.

2. Drag the text columns from the Data Table (on the left panel of the Workbook) to the filter box.

   The filter type will automatically adjust, depending on the number of unique values.

3. Click on **Settings** on the upper right corner of the Filter, and then select a filter to define filter properties per field.

6 SAVE YOUR WORKBOOK

If you wish to save your workbook, click the **Save** icon on the toolbar.

Open the same Workbook using the **Open** icon.
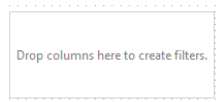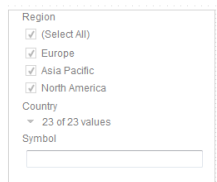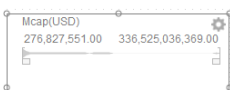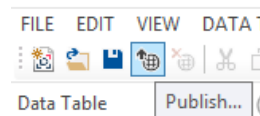
7 SWAP BETWEEN DESIGN AND PRESENTATION MODES

Click the **Presentation Mode** icon on the toolbar to swap between Design and Presentation modes.

- **Presentation Mode** removes all the design elements and provides a clean, simplified display for interactive analysis.

- **Design Mode** allows you to add, edit, and remove Visualizations, Filters, Legends, and Dashboard Tabs.

8 PUBLISH TO THE WEB

If your system has a Datawatch Panopticon Server installed, you can publish your Workbook so other users can access it over the web.

1. Click the **Publish** icon on the toolbar.

   Note: This option will be grayed out if no Datawatch Panopticon Server is available.

2. Enter the Name of the Workbook. Select the Folder or Sub-folder that are defined on the Panopticon Server.

3. Click **OK**. Your workbook is now published to the web.

■ NEXT STEPS

Use Datawatch Panopticon Designer's comprehensive documentation to help you create better visualization:

- Online Help is installed with the product.

- A Learning Guide, Reference Guide and Visualization Guide in PDF format are also available. Click **Start > Programs > Datawatch Desktop > Designer** to read these.

- Use the Workbook called Tutorial. This is also installed as part of the samples that come with Panopticon Designer:

Tutorial