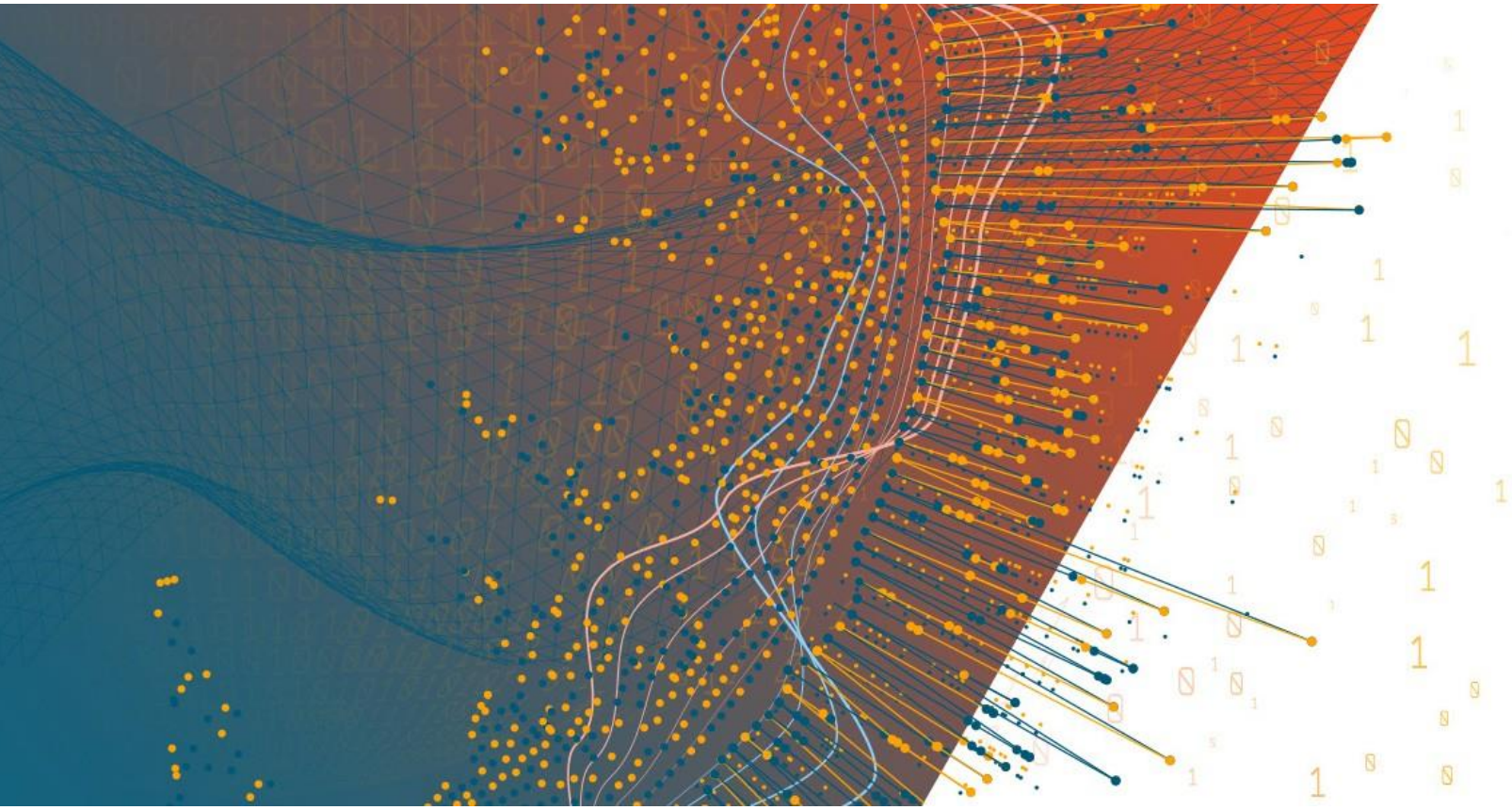

ALTAIR

Altair Panopticon™ v2021.2
ANALYST CLIENT USER GUIDE

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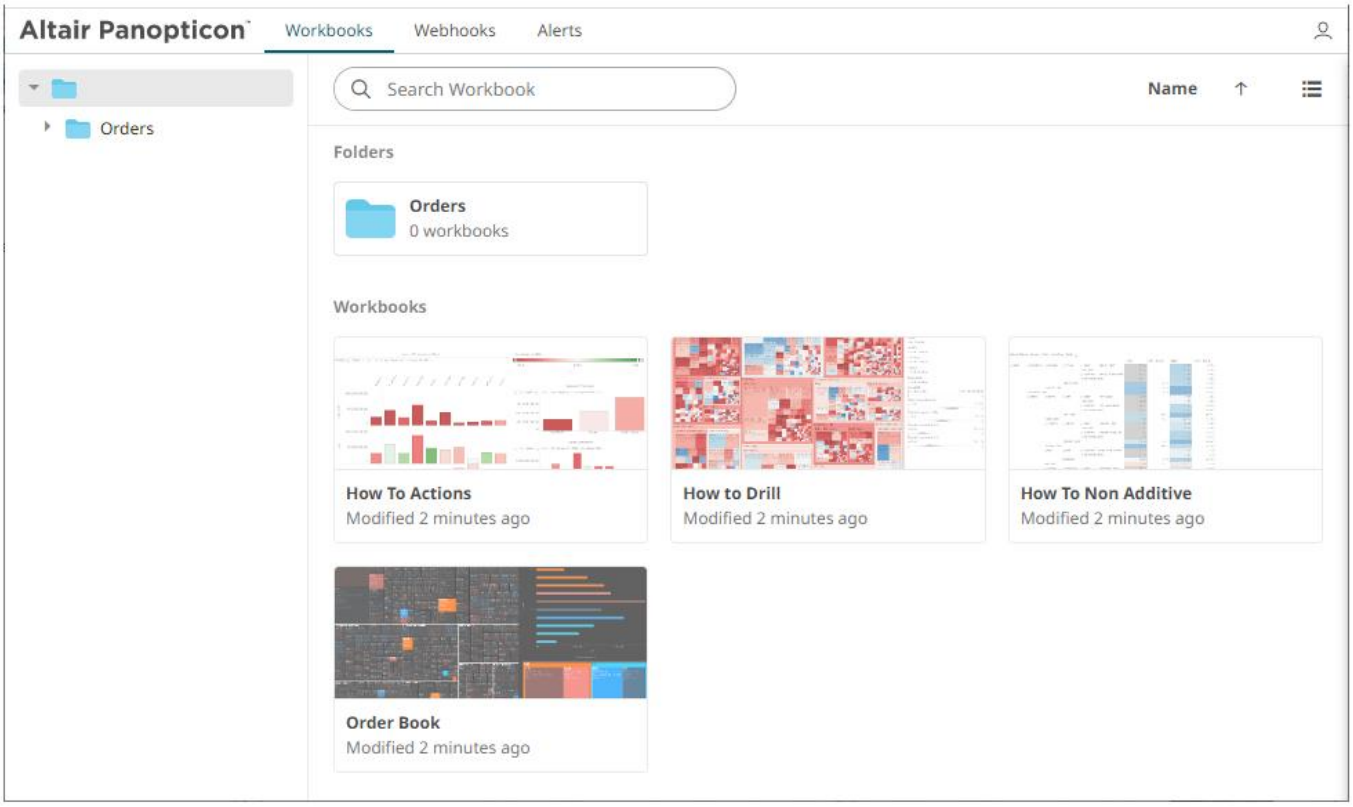
[1] ALTAIR PANOPTICON WORKBOOKS

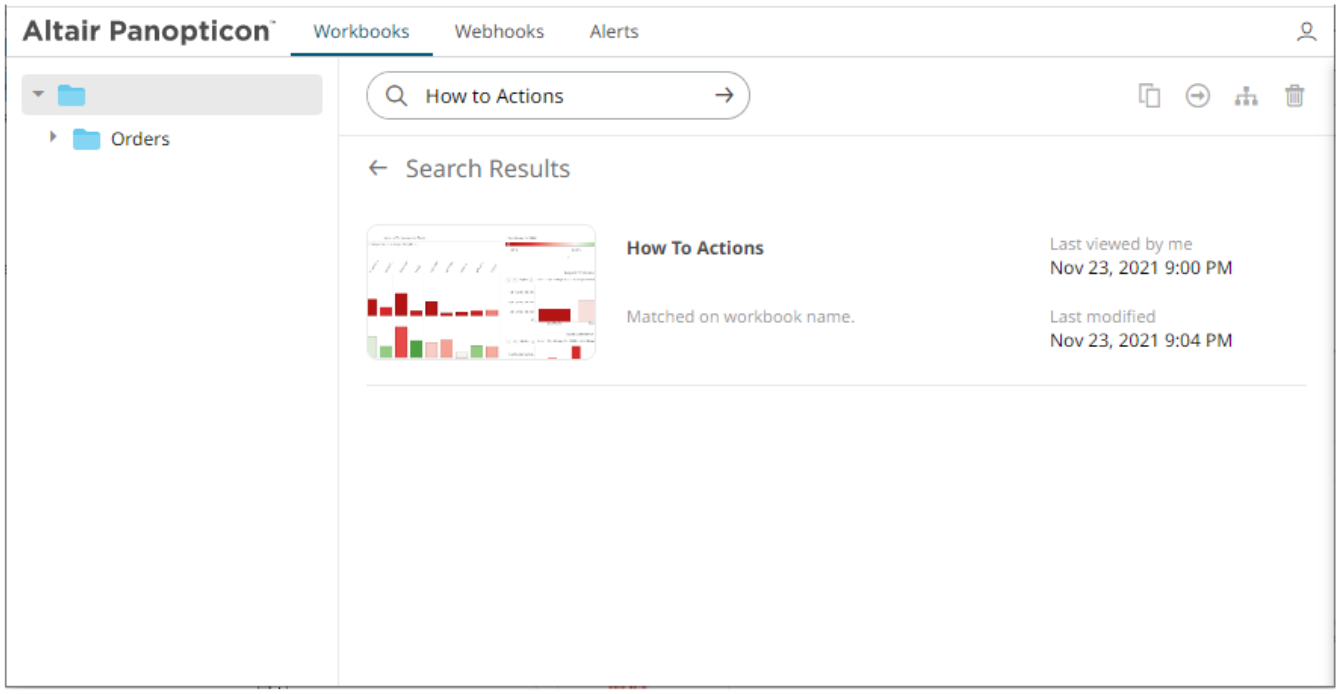
ACCESSING WORKBOOKS

The default home page for the Panopticon Visualization Server lists available folders and uploaded or published workbooks in *Grid View*.

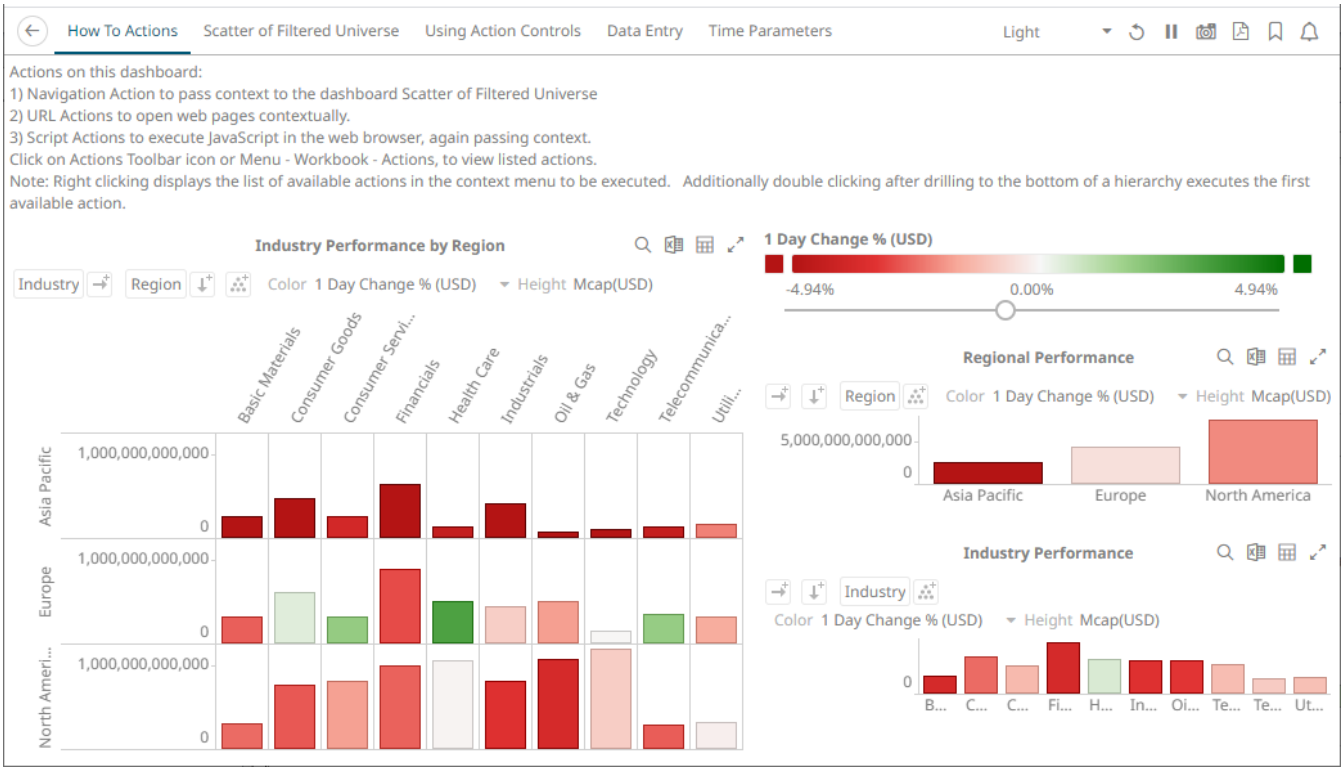
- The *Folders* include their names and the number of available workbooks.
- The *Workbooks* include their titles, thumbnail images, and when they were last updated.



Enter text in the *Search Workbooks* box to filter the workbook thumbnails.

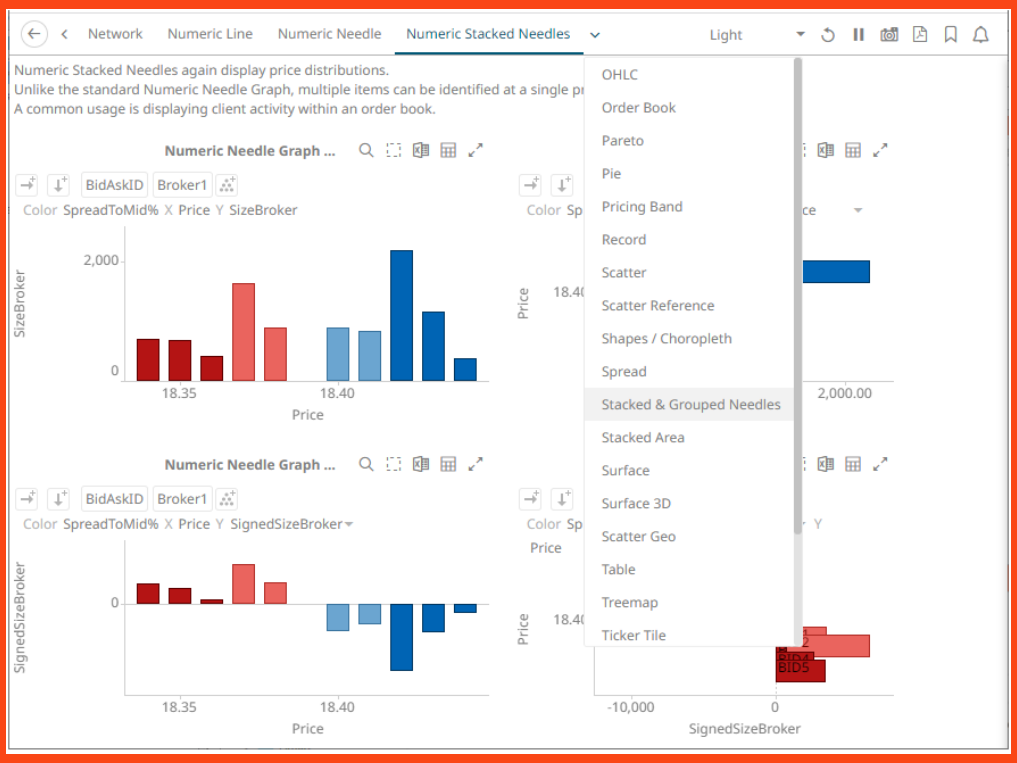


Clicking on the workbook thumbnail opens it on the *Open Workbook in View Mode*:

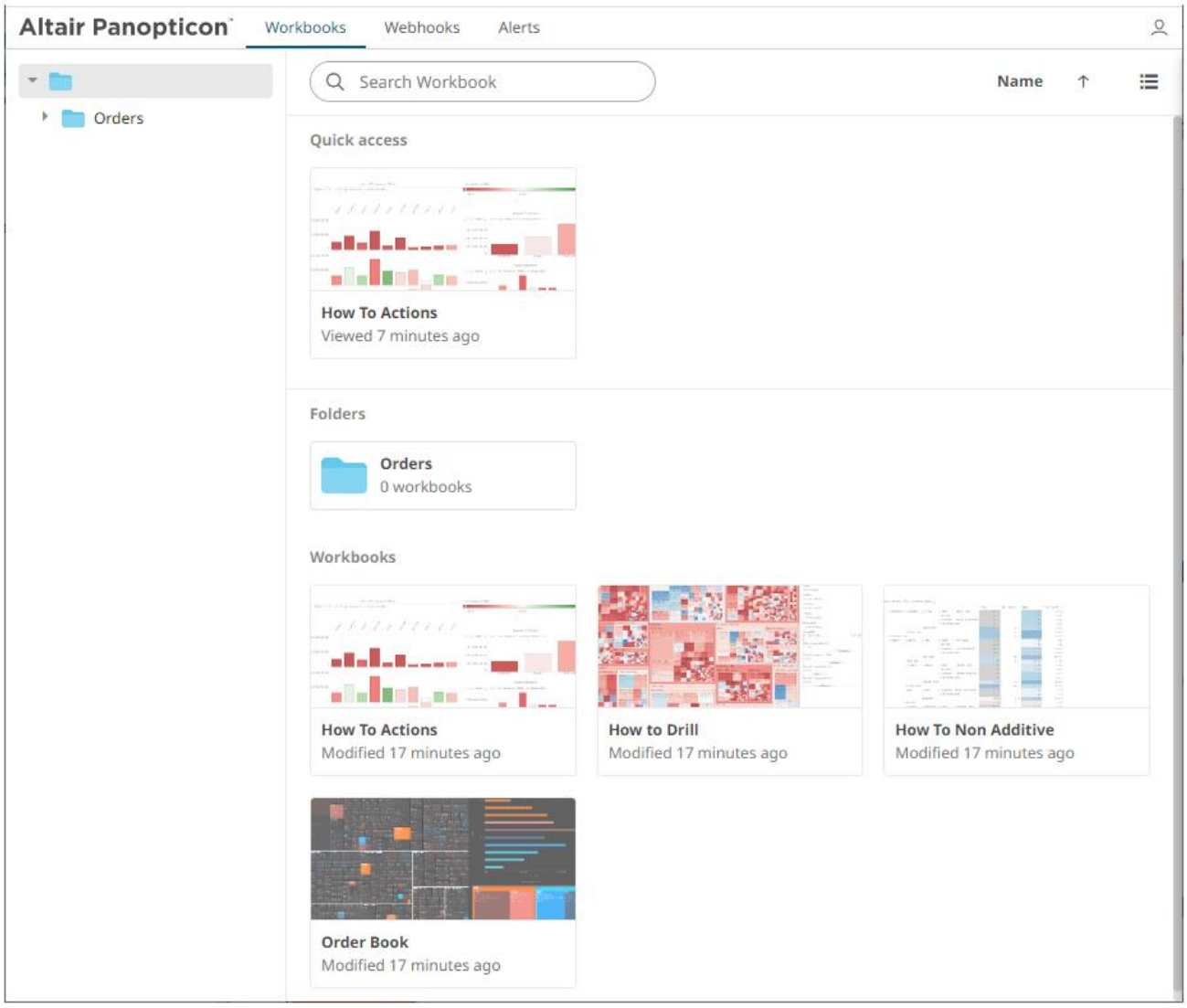


NOTE

The > signifies there are more dashboards in a workbook that can be opened. Click this icon to expand the drop-down list and display all of the available dashboards and select one to display.



The opened workbooks are then displayed on the *Quick Access* pane.



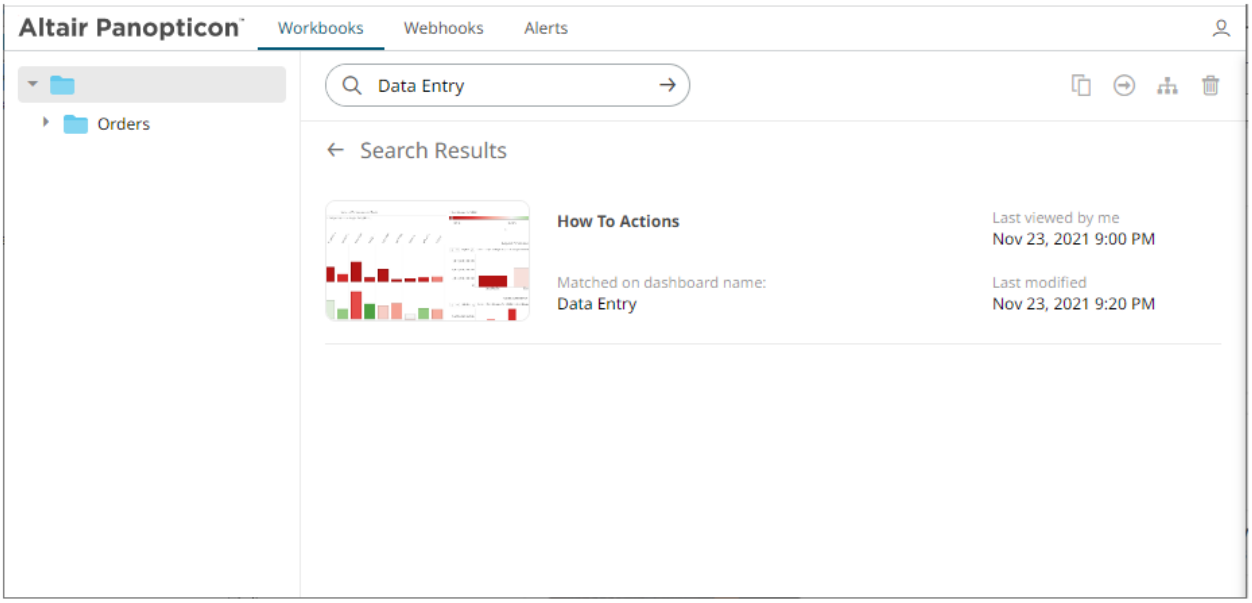
SEARCHING FOR WORKBOOKS

Search for particular workbooks that may be located in different folders.

Steps:

1. On the *Workbooks and Folders Summary* layout, click on a workbook folder then enter a workbook name or dashboard name in the *Search Workbook* box.

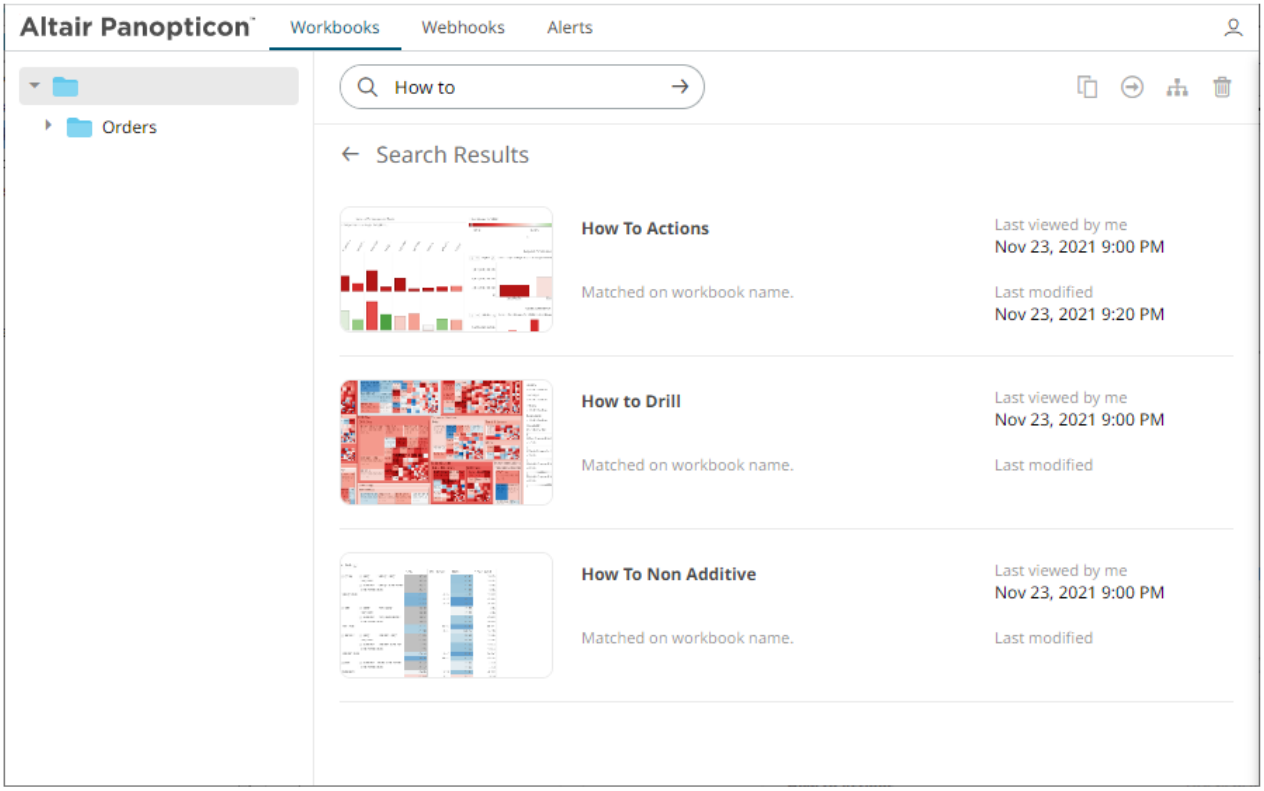
2. Click → .



The following information are displayed for each workbook:

- Folder where the workbook is located.
- What the search match was based on: workbook or dashboard name.
- Date/Time when the workbook was last viewed
- Date/Time when the workbook was last modified

You can also enter one or more characters into the *Search Workbook* box then click **Enter**. The list of workbooks that matched the entries will be displayed.



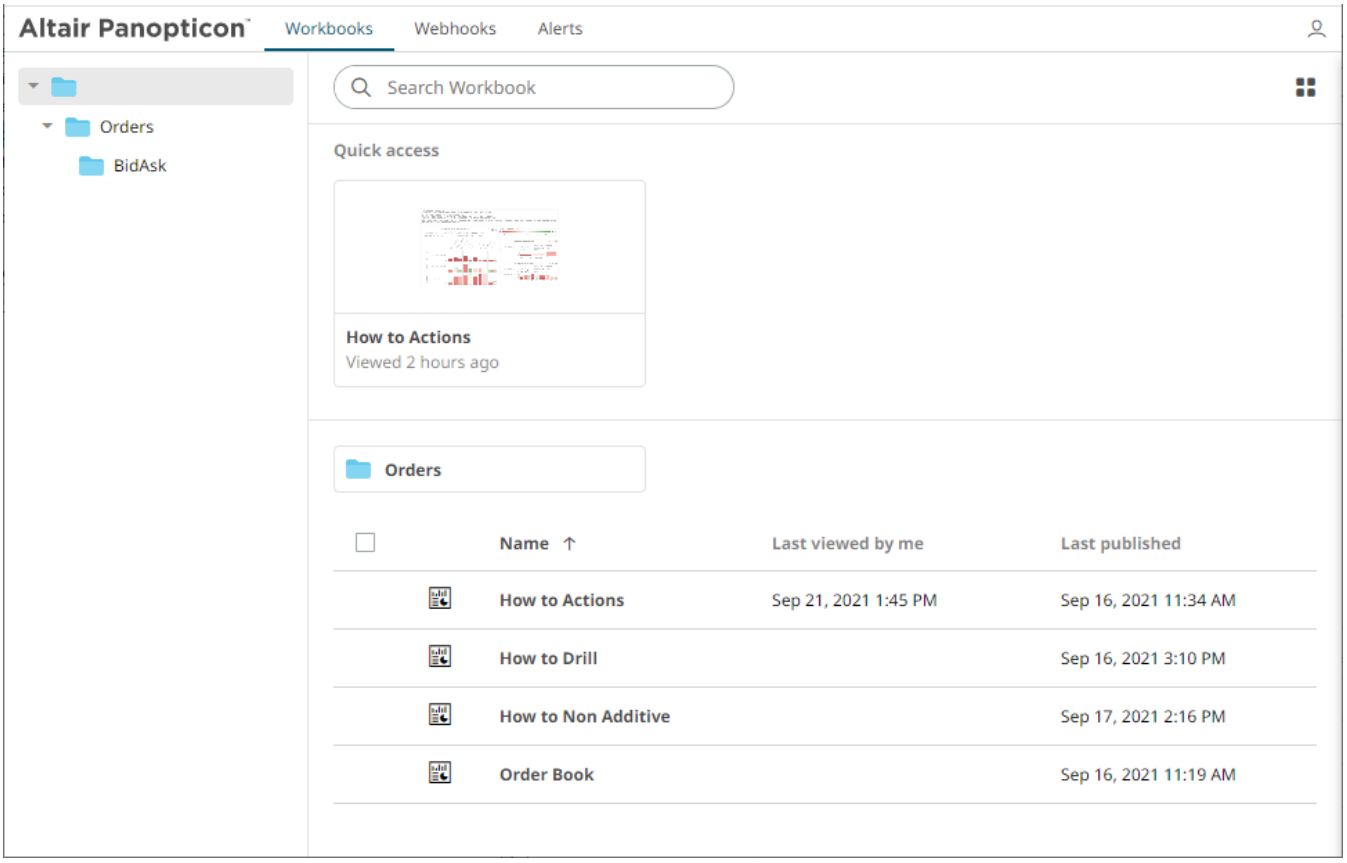
Click on a workbook thumbnail to open and display it on the web browser.

To go back to the *Workbooks and Folders Summary* layout, click .

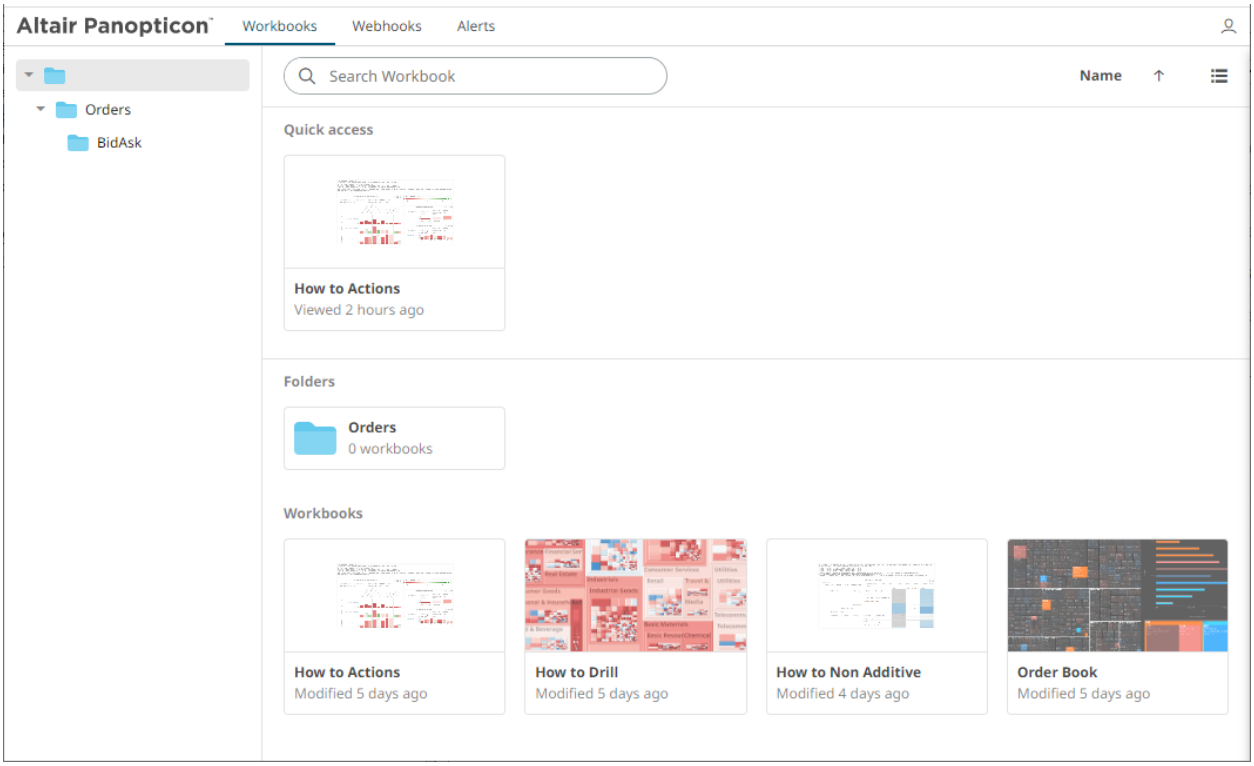
Folders and Workbooks Display View

Workbooks can be displayed either on a *List* or *Grid View*.

On the *Toolbar*, click **List View** , the folders and workbooks are displayed in a standard listing.



Or click **Grid View** . The folders and workbooks are displayed as thumbnails.



On either display view style, clicking on a workbook title or thumbnail displays the workbook on the *Open Workbook in View Mode*.

Sorting Workbooks

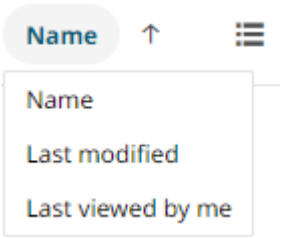
Sorting workbooks can be done by *Name*, *Last Viewed/Last Published*, or *Last Viewed by Me*.

Steps:

On the *Folders and Workbooks Summary* layout, either:

- ❑ click the **Sort By** option on the *Toolbar* of the *Grid View*

  By default, the sorting is by **Name**.

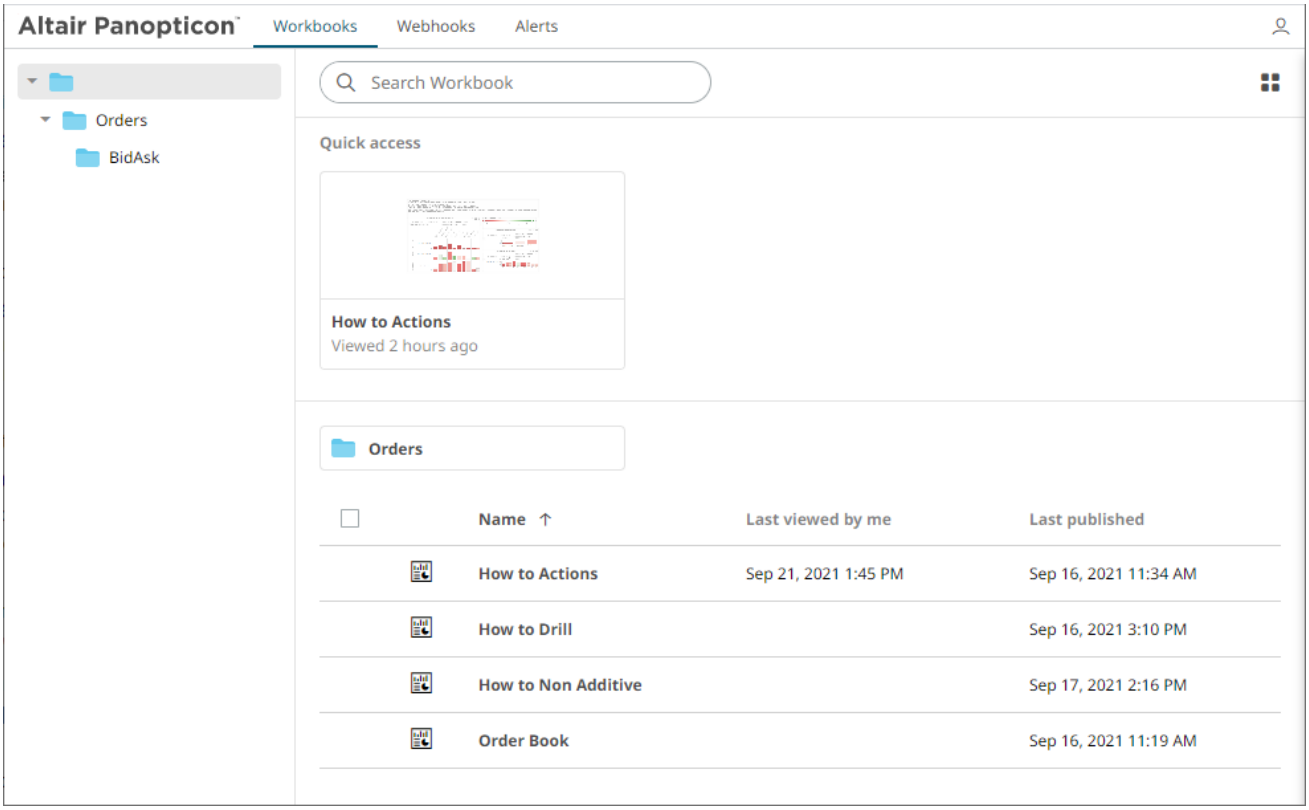


  - Name
  - Last Modified
  - Last Viewed By Me

  Then click the *Sort Order*:

- Ascending
- Descending

- click on the **Name**, **Last Viewed By Me**, or **Last Published** column header of the *List View*

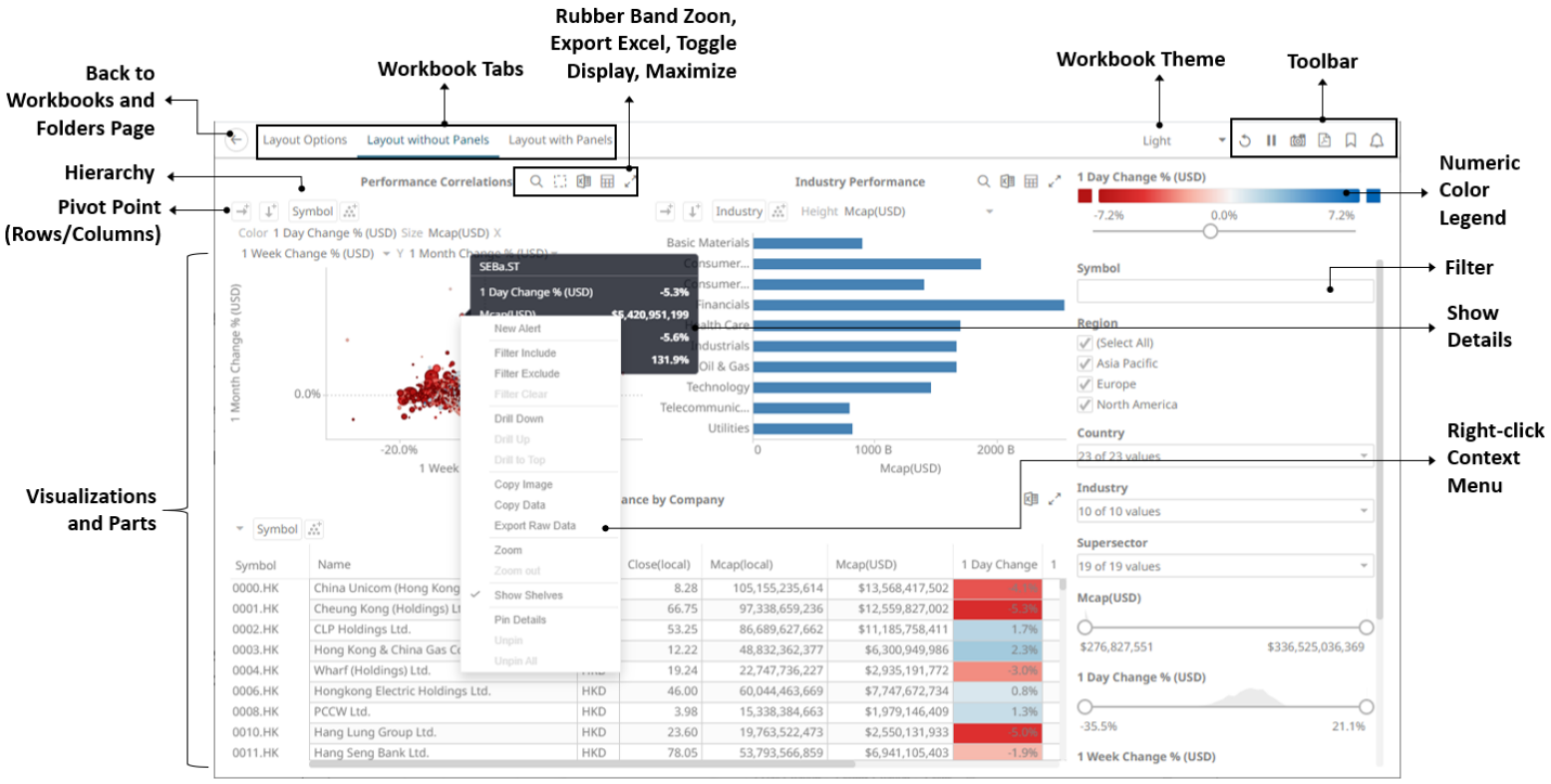


Then click the *Sort Order*:

- Ascending
- Descending

WORKBOOK ELEMENTS

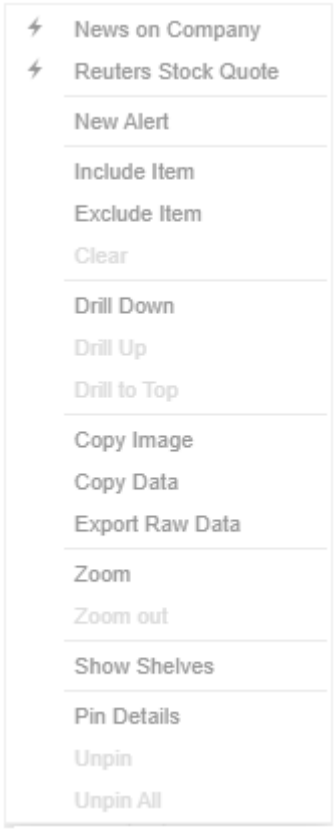
- Each workbook may contain several dashboards.
- Each dashboard in a workbook may contain multiple visualizations, legends, and filters.
- Each dashboard shows up as a tab at the top of the screen. Click on the dashboard tab you want to use.



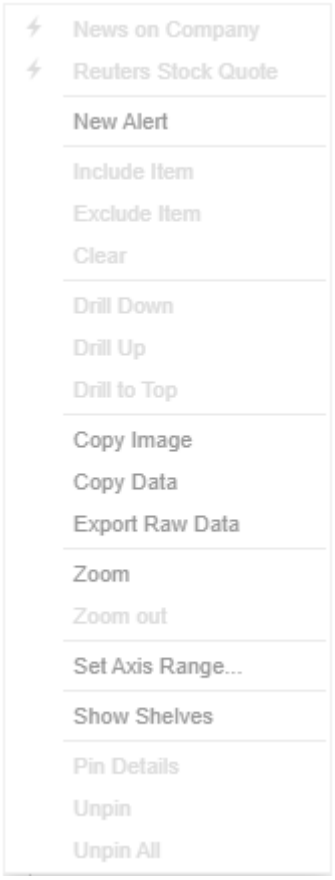
Users can interact with the workbook using the visualization right-click context menu, header controls, shelves, variables and cross tab options.

Context Menu

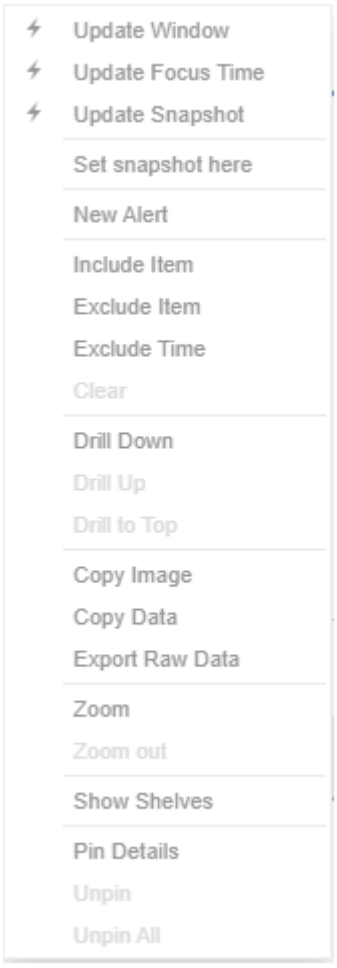
The visualizations in a workbook provide the following right-click menu options:



Visualization Context Menu



Visualization Context Menu of the Numeric Axis



Time Series Visualization Context Menu of the Time Axis

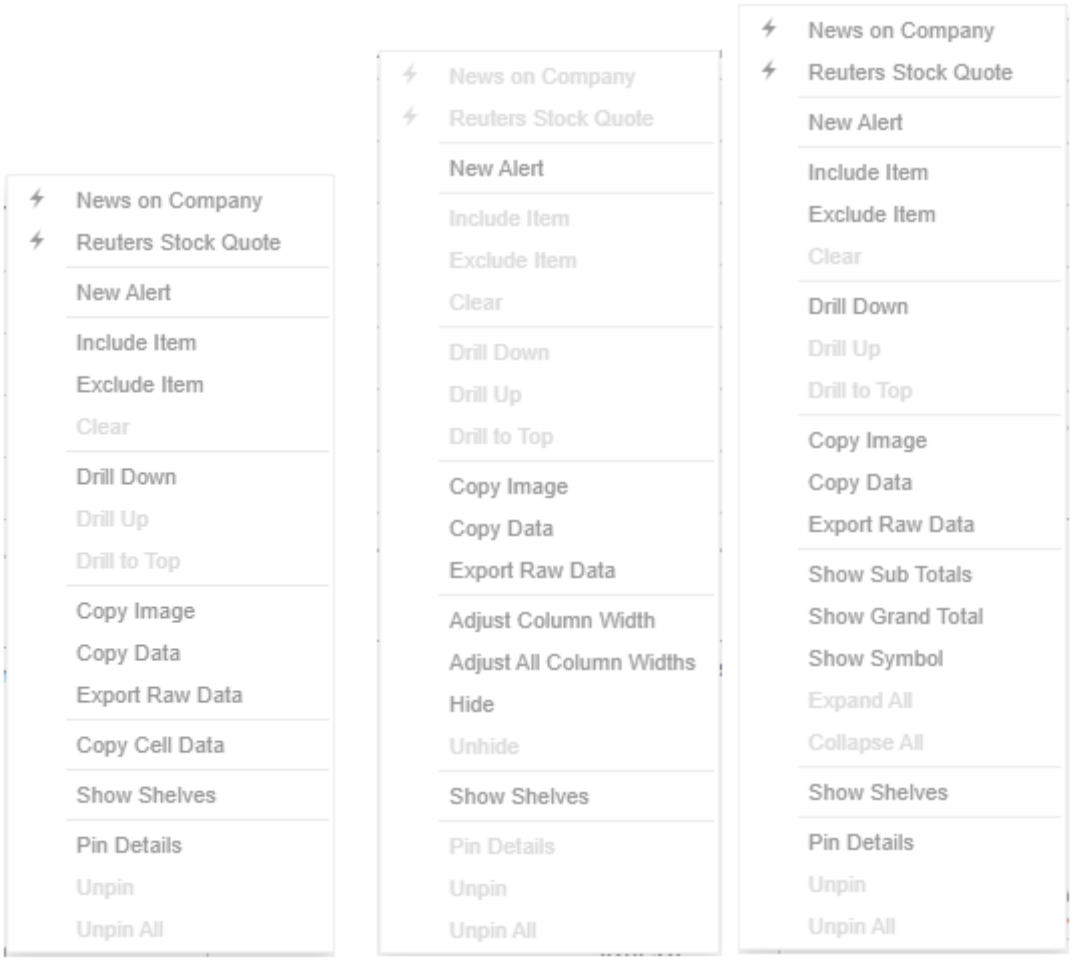
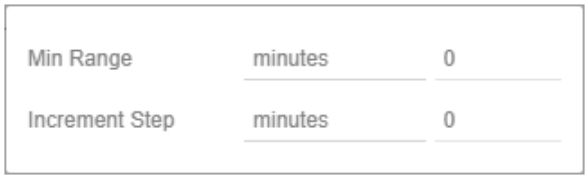


Table visualization context menus depending on where you click on the visualization

Context Menu	Description
Automatic Parameterization	Run an automatic parameterization.
Actions	Run a workbook action on the visualization.
New Alert	Create an alert.
Visualization Filtering	Allows visualization filtering. Options include: • Filter Include • Filter Exclude • Filter Clear
Drilling	Allows drilling into visualizations. Options include: • Drill Down • Drill Up • Drill to Top
Data Export	Allows exporting of data. Options include: • Copy Image

	• Copy Data • Export Raw Data • Copy Cell Data
Zooming	Allows zooming in and out of visualization sections.
Show Shelves	Allows cross tab, breakdown, and variable shelves to be displayed.
Pinning	Allows pinning of the *Details* pop-up. Options include: • Pin Details • Unpin • Unpin All

The additional time series visualization context menu options include:

Setting	Description
Set Snapshot Here	Available in the time series visualization context menu when the Snapshot Grid Line is rendered or set to **Dotted**, **Dashed**, or **Solid** in the Time Axis variable.
Set Axis Range	Allows setting of the time axis range:  • Min Range The minimum time axis range. Supported units are milliseconds, seconds, minutes, hours, days, months, quarters, and years. • Increment Step Controls how much the time axis span is extended at the point when the latest value is at the end of the current time axis span. Supported units are milliseconds, seconds, minutes, hours, days, months, quarters, and years. This setting helps in seeing how a real-time data set grows from left to right along the time axis, giving a better impression and understanding of the progress.

The additional Table visualization context menu options include:

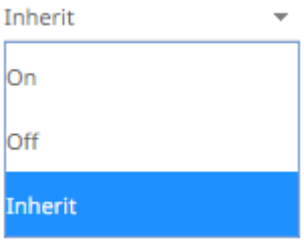
Context Menu	Description
Adjust Columns	Adjust column width in the table visualization.
Hide / Unhide Columns	Hide or display columns in the table visualization.
Show Hierarchy Column	Display the hierarchy column.
Expand / Collapse Hierarchy	Expand or collapse sections of the hierarchy.
Show Grand Total	Determines whether the Grand Total aggregate row is shown in the table.
Show Sub Totals	Determines whether Sub Total aggregate rows are shown in the table.

Show <Column>	Display the breakdown column.

Automatic Parameterization

Determines whether parameters are to be automatically updated or the setting will be inherited from the workbook property.

Workbook designers set this property in the *Dashboard and Workbook Settings* pane.

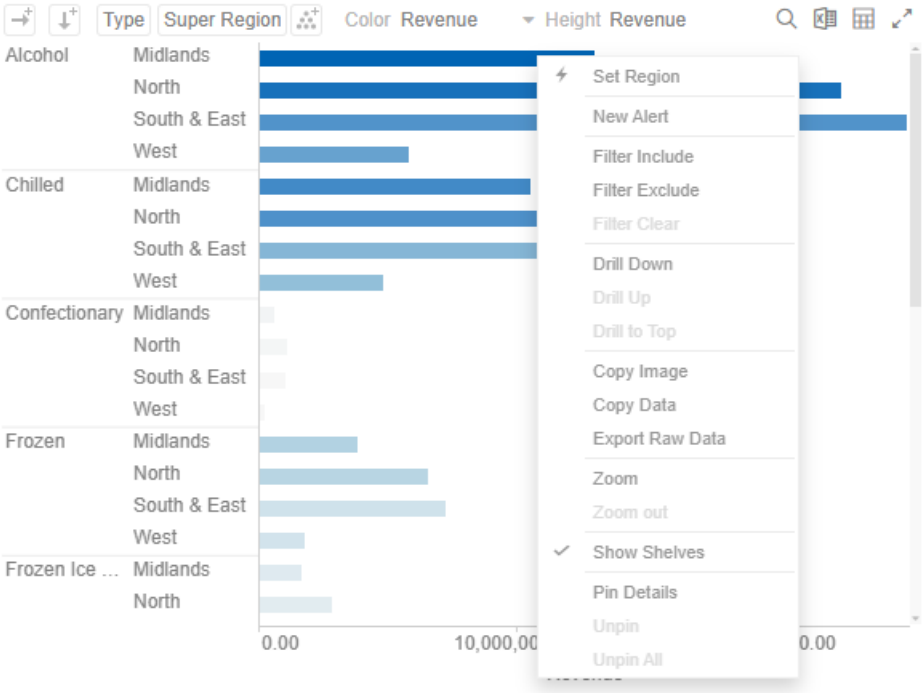


- On

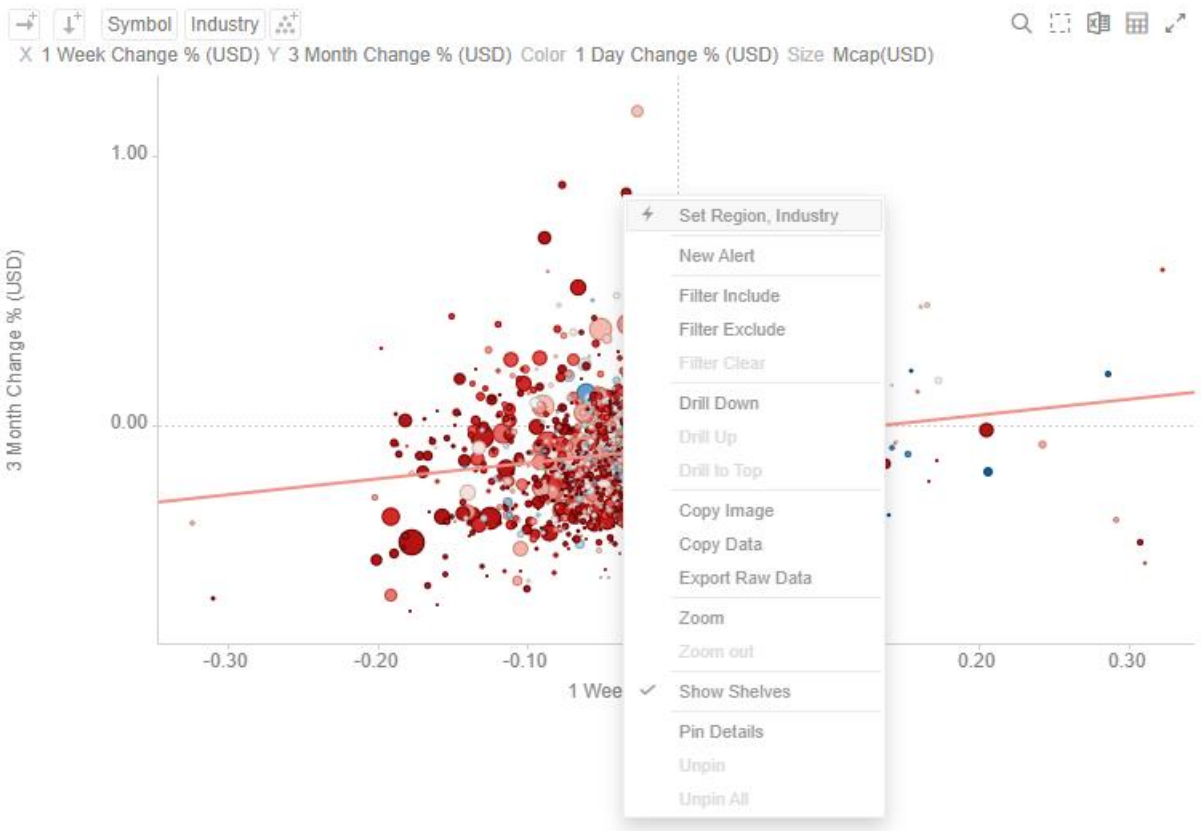
  When turned on, parameters can be automatically updated within a dashboard by right-clicking on a visualization item and selecting it from the context menu with the blue lightning icon.

  The dashboard parameter values to be passed will include all possible data table values of the selected visualization.

  For example, if there are Region and Industry dashboard parameters, and the associated data table of the visualization has a Region but no Industry column, then the *Automatic Parameterization* option will only include:



  However, if the associated data table of the visualization has Region and Industry columns, then the *Automatic Parameterization* option will include both:



- Off

  Automatic parameterization on the visualization based on the dashboard parameters is turned off.

In some circumstances, it may be appropriate to disable this automatic parameterization, and instead utilize more configurable navigation actions.

- Inherit

  The automatic parameterization is inherited from the workbook property.

Action

Actions allow Panopticon workbooks to be more interactive:

- Link information in dashboards to external systems
- Use Navigation Actions to pre-filter dashboards
- Open web pages contextually through URL Actions
- Execute JavaScript functions in context using Script Actions

Actions use parameters to pass selected text values to external applications, to JavaScript functions and to other dashboards.

All methods provide the ability to view a summary data set, select particular items of interest and then jump to another data set focused on these particular items. This focused data set may be presented through another tab within the workbook (Navigation Action) or through an external system (URL Actions & Script Actions).

Actions are exposed to the user through the right-click context menu, with the **Action** icon to the left of the Action name.

Within the Panopticon workbook, the focused data set is achieved through the use of parameters in the data set.

Parameters values, must be text and are specified either through:

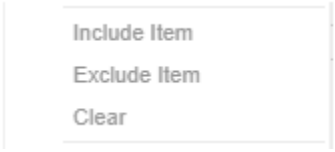
- Default values on the creation of the parameter in the data table
- Values specified as a result of right-clicking on an item and executing an action
- Values specified externally, when a workbook is accessed via the web browser, and the parent web page includes the specified values as inputs
- In the specific case of the parameter **_user_id**, the authenticated username is retrieved.
- In the other special case for the parameters **$TimeWindowStart**, **$TimeWindowEnd**,and **$Snapshot**
- Other special cases for parameters used for zooming allow for **$XAxisValueMin, $XAxisValueMax, $YAxisValueMin,** and **$YAxisValueMax**

Typically, actions are created once the workbook design has largely been completed, with visualizations added to each **Dashboard** (tab), some being open to all data, and some being parameterized, visualizing data based on the default parameter values.

For a more detailed information about actions, refer to the *Altair Panopticon Web Authoring Guide*.

Visualization Filtering

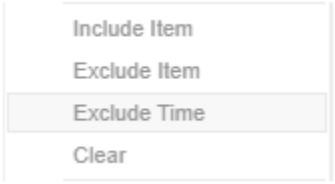
Visualizations themselves can be used as filters by selecting items, and right-clicking to display the context menu with these three options:



- **Include Item** filters the dashboard to include the selected items.
- **Exclude Item** filters the dashboard to exclude the selected items.
- **Clear** removes any visualization filters.

> **NOTE** **In the Web client, the *Include Item* and *Exclude Item* options are disabled when there is no breakdown or the root is selected in visualizations.**

For time series visualizations, an additional option is available.



Exclude Time filters all the series to exclude the time point/s.

When a visualization filter is applied, filter icons appear at the left of the filter column title and on the toolbar of the dashboard. Clicking or will remove the filter.

Also, **Show Active Filters** icon displays on the toolbar. This allows viewing of all the active filters on the dashboard and its visualizations.

Viewing Active Filters

Information on active filters applied on the dashboard and its parts can be viewed.

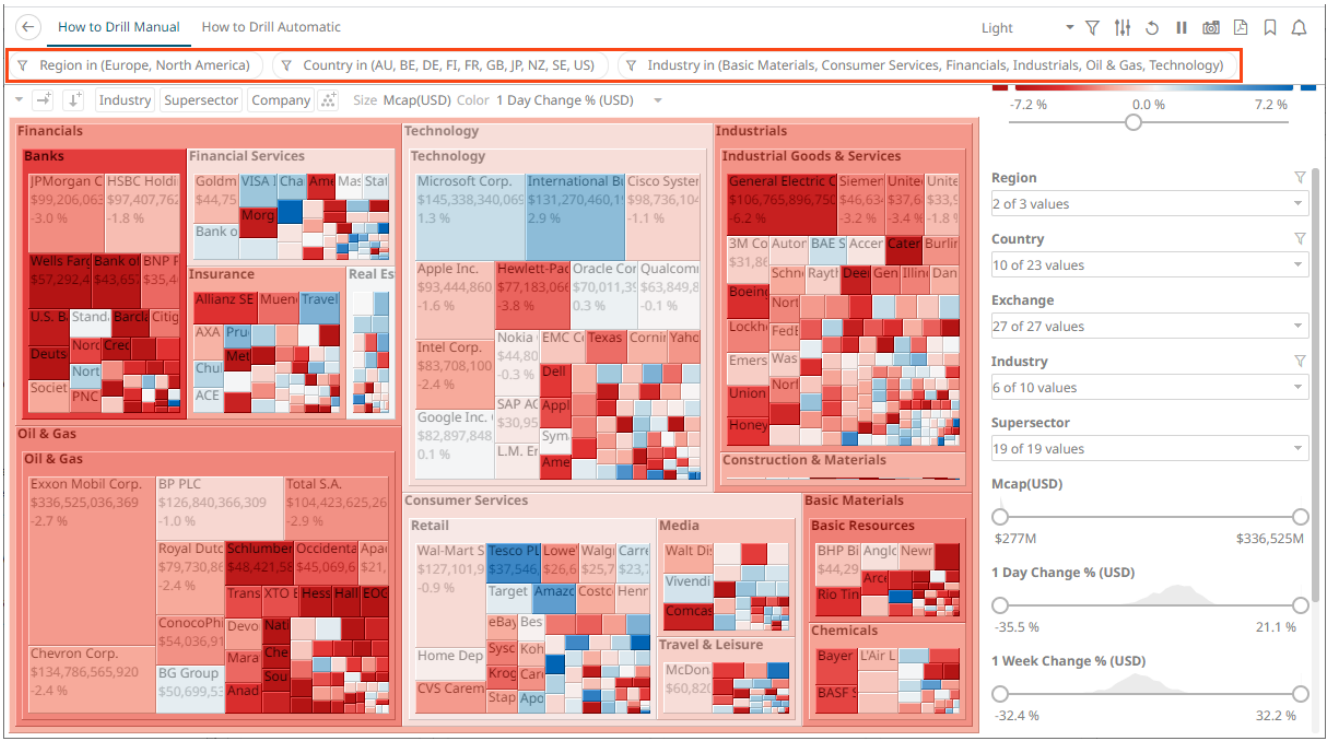
These filters can be done through:

- Filter controls
- Visualization filter

Steps:

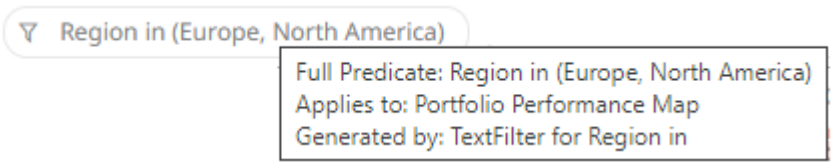
1. Click the **Show Active Filters** icon on the toolbar.

   All of the predicates of the active filters are displayed. For this sample, there are three active filters.



2. Hover on any predicate to display its details.

   Predicate 1:



   Predicate 2:

   Predicate 3:

Property	Description
Full Predicate	Predicate details.
Applies To	Parts in the dashboard where the predicate is applied.
Generated By	Source of the predicate which include the filter column data type in the filter control or global filter.

3. To clear any predicate in the list, click .

Drilling into Visualizations

Visualizations themselves can be used to drill into lower or upper details by selecting items, and right-clicking to display the context menu with three options:

- Drill Down – Drills down to the lower level of the selected value.

NOTE **Drilling without filter (or soft drill) is turned on for all aggregates that refer to:**

- **Nodes above the node like the parent or root**
- **Siblings of the node**

Applicable to the following aggregates in the *Aggregate* drop-down list:

- **Sibling Rank**
- **Percent of Total**
- **Percent of Weight Total**
- **Percent of Parent**
- **Percent of Weight Parent**
- **Percent of Total Change**
- **Cumulative Sum**
- **Cumulative Sum By Max**

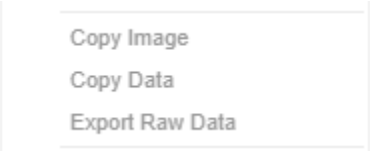
- Drill Up – Enabled when the lower level of the selected item is displayed. Click to drill to the upper level.
- Drill to Top – Drills to the top level of the selected value.

Drilling into visualizations can also be done by double-clicking on a value.

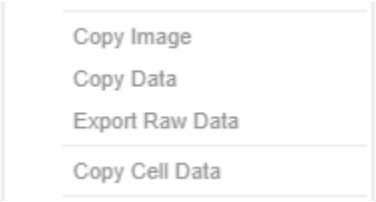
Data Export

The data in a visualization can be exported and copied to a clipboard for future use in another application. In addition, the raw data of the visualization can also be exported.

Visualization Level data is exported by right-clicking on the visualization to display the context menu with two options:



For the Table visualization, **Copy Cell Data** is also available which allows copying of a single cell.

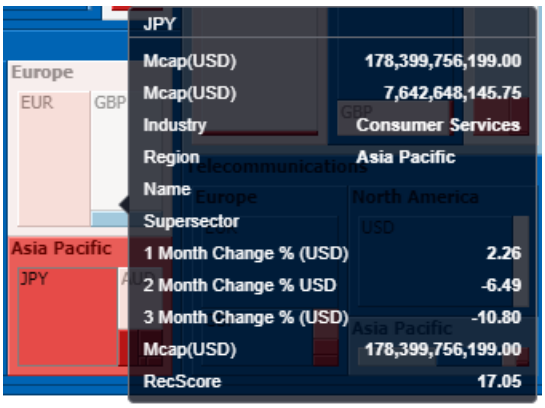


The data exported will be what appears on screen, or in a linked table. Specifically, all the columns that appear in the Detail pop-up, including:

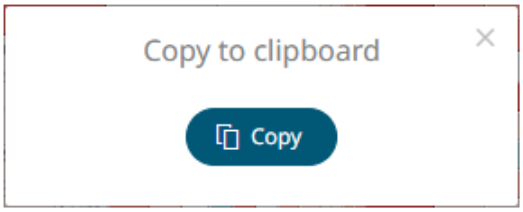
- Only those items that are visible (for example, items that have not been filtered)
- Same Visible detail (or depth) level displayed in the visualization.

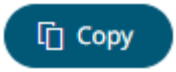
		1 Day Change ...	1 Month Chang...	1 Week Change...	Mcap(USD)	RecScore	Target
3i Group PLC	Financials	0.04	0.35	0.01	1,488,911,563.00	0.42	12.00
3M Co.	Industrials	-0.01	0.07	0.01	31,869,237,156.00	0.25	12.00
77 Bank Ltd.	Financials	-0.06	0.06	-0.03	1,855,149,668.00	0.39	12.00
A.P. Moller-...	Industrials	-0.01	-0.09	-0.08	4,742,697,140.00	0.32	12.00
A2A S.p.A.	Utilities	-0.04	0.00	-0.05	1,906,029,009.00	0.28	12.00
ABB Ltd.	Industrials	0.01	0.16	-0.02	32,461,622,181.00	0.36	12.00
Abbott Labo...	Health Care	0.02	-0.06	-0.02	73,392,451,232.00	0.36	12.00
ABC-Mart Inc.	Consumer Go...	-0.06	-0.10	-0.03	556,753,517.00	0.26	12.00
Aberdeen A...	Financials	0.00	-0.05	-0.09	1,310,061,051.00	0.34	12.00
Abertis Infr...	Industrials	-0.01	0.08	-0.04	4,574,542,373.00	0.28	12.00
Accenture L...	Industrials	-0.01	0.03	-0.13	17,063,968,693.00	0.37	12.00
Acciona S.A.	Industrials	-0.05	0.02	-0.12	2,628,978,079.00	0.38	12.00

Data for a single item can be exported by selecting the item.



Right-clicking and selecting **Copy Data** on the context menu displays the **Copy to Clipboard** button.

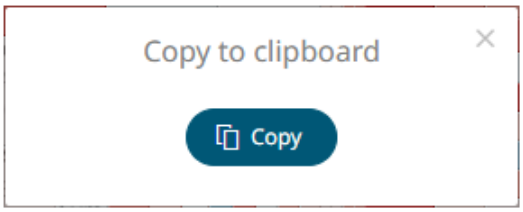


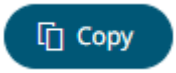
Click  to copy and paste the data to another application such as MS Excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Industry	Region	Forex	Mcap(USD)	Mcap(USD)	Industry	Region	Name	Supersector	1 Month C	2 Month C	3 Month C	Mcap(USD)	RecScore
2	Consumer Services	Asia Pacific	JPY	178,399,756,199.00	7,642,648,145.75	Consumer Services	Asia Pacific			2.26	-6.49	-10.8	178,399,756,199.00	17.05
3	Consumer Services	Asia Pacific	AUD	50,133,333,497.00	12,936,271,602.96	Consumer Services	Asia Pacific			2.6	1.97	-0.18	50,133,333,497.00	4.97
4	Consumer Services	Asia Pacific	HKD	13,911,773,856.00	3,591,228,903.73	Consumer Services	Asia Pacific			0.12	-0.25	-0.2	13,911,773,856.00	1.7
5	Consumer Services	Asia Pacific	SGD	11,526,400,942.00	2,272,641,412.37	Consumer Services	Asia Pacific			0.57	-0.1	-0.5	11,526,400,942.00	2.22
6	Consumer Services	Asia Pacific	USD	1,290,851,336.00	1,290,851,336.00	Consumer Services	Asia Pacific	Dairy Farm Intern	Retail	0.01	0.01	0.03	1,290,851,336.00	0.32
7	Consumer Services	Asia Pacific	NZD	764,739,495.00	764,739,495.00	Consumer Services	Asia Pacific	Sky City Entertain	Travel & Leisure	0.18	0.02	-0.09	764,739,495.00	0.4

If **Export Raw Data** is selected, all the data from the source data table is exported, and not just the actively displayed nodes within a visualization.

Right-clicking and selecting **Copy Image** on the context menu displays the **Copy to Clipboard** button.

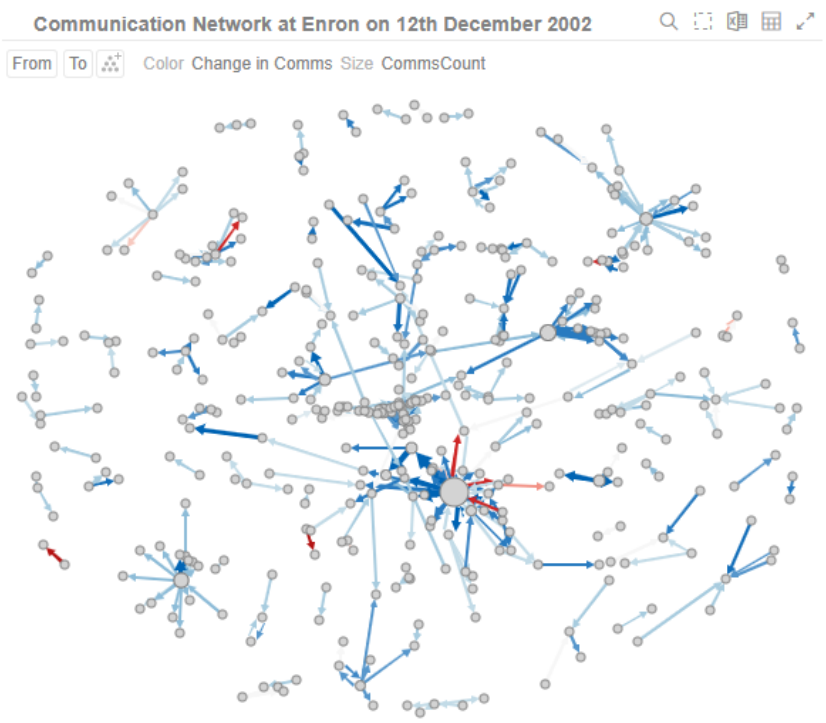


Click  to copy and paste the whole dashboard image to another application.

Rubber Band Zoom and Selection

Rubber Band Selection allows multiple items to be selected or lassoed by defining an area with the mouse. When selected, the mouse pointer is displayed as a crosshair. Clicking and dragging the mouse defines the selected area in grey. Once confirmed the selected items are highlighted. This selection option is available in the Network Graph visualization.

Before

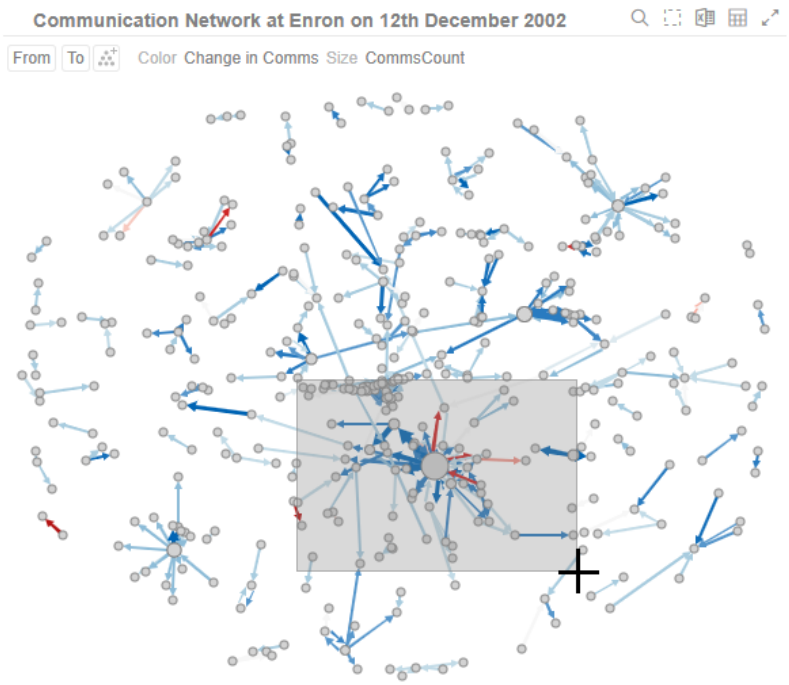


Before selection

Click the **Rubber Band Selection** icon on the header control. The mouse turns into a crosshair.

During

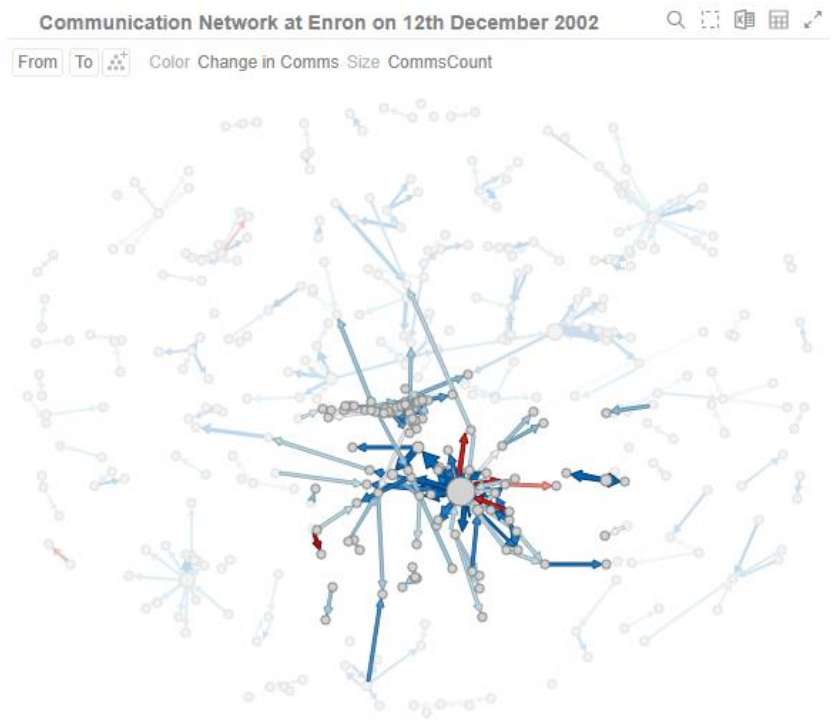
Mouse pointer has been dragged to define an area of interest.



During selection

After

The selected items are highlighted.



After selection

To unselect, click on any part of the visualization.

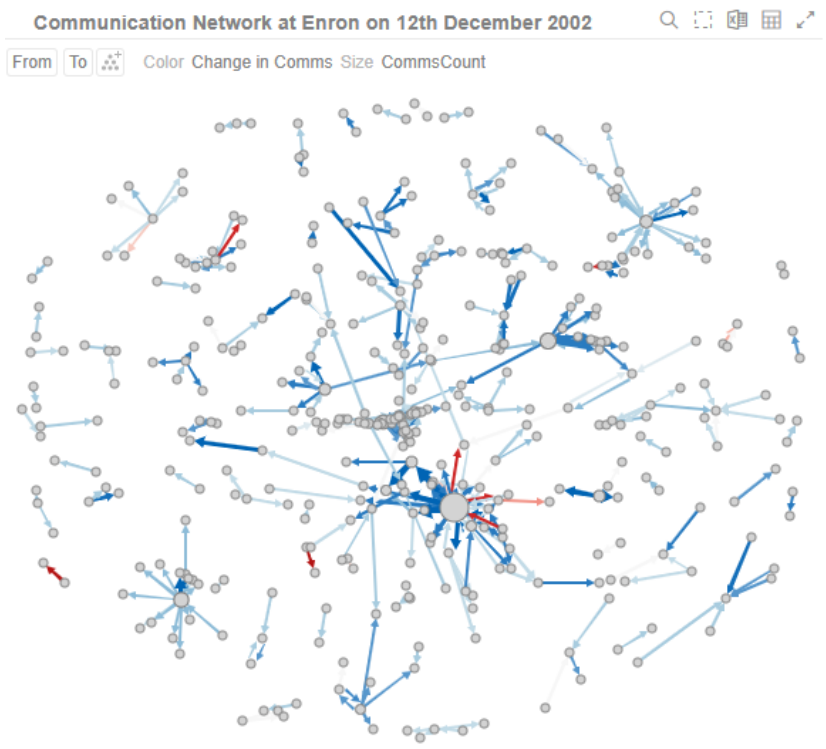
Rubber Band Zoom is supported for visualizations that have:

- Numeric X and Y axes
- Date/Time X and Y axes

These are Candle Stick, Line Graph, Needle Graph, Network Graph, Numeric Line Graph, Numeric Needle Graph, Numeric Stacked Needle, OHLC Graph, Order Book, Price Band, Scatter Plot, Spread Graph, Stacked Needle Graph, Timeseries Combination, and Timeseries Scatter Plot visualizations.

NOTE **When the cross tab consists of two Text axes, Rubber Band Zoom is not available.**

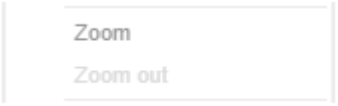
Before



Before zooming

You can either:

- select **Zoom** in the context menu, or

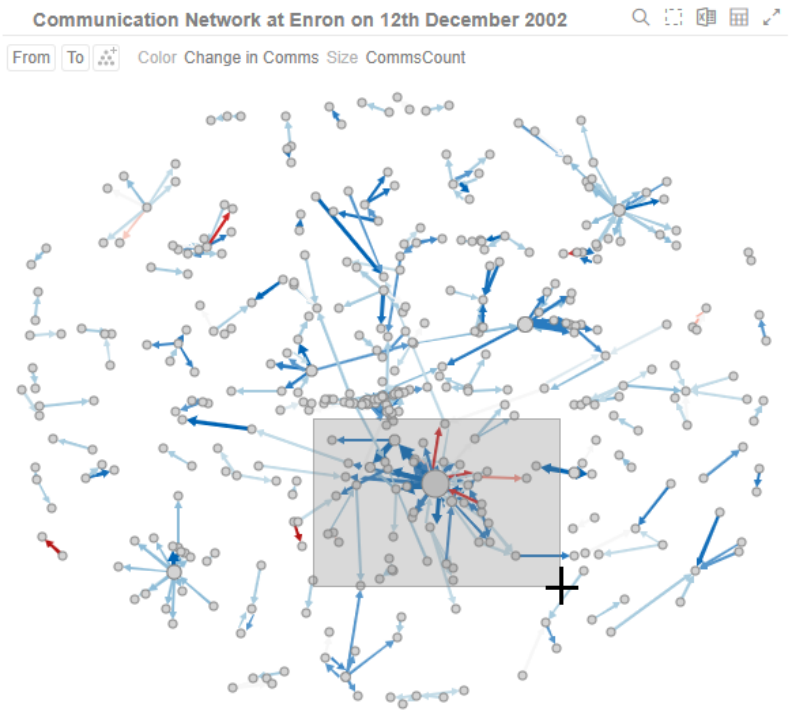


- click the **Rubber Band Zoom** icon on the header control

The mouse turns into a crosshair +.

During

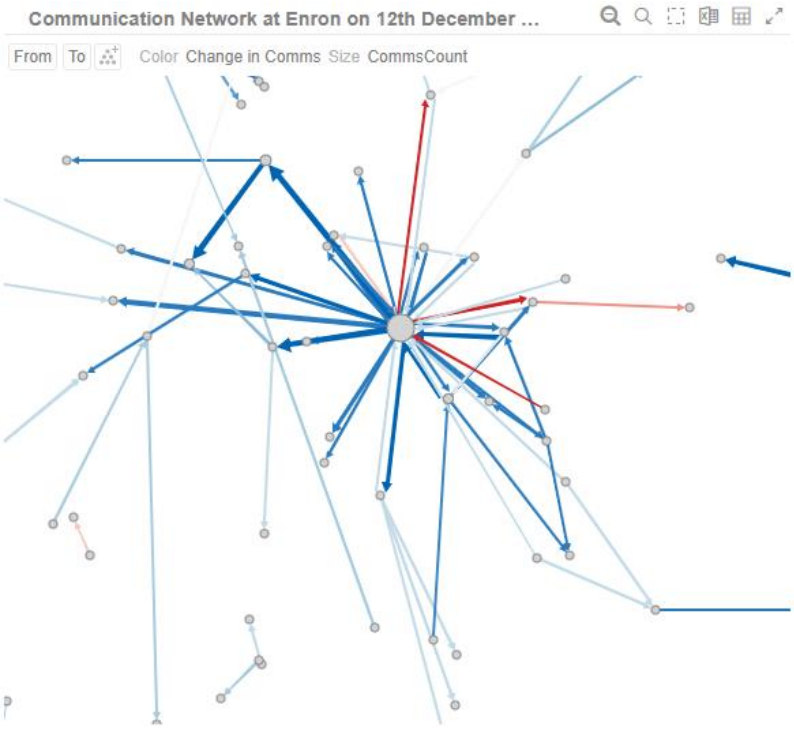
Mouse pointer has been dragged to define an area of interest.



During selection for zooming

After

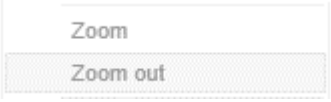
Selected items is zoomed in and the **Zoom Out** icon has is displayed.



After zooming

To revert to the original state of the visualization you can either:

- click the **Zoom Out** icon at the top right of the visualization
- select **Zoom Out** in the context menu

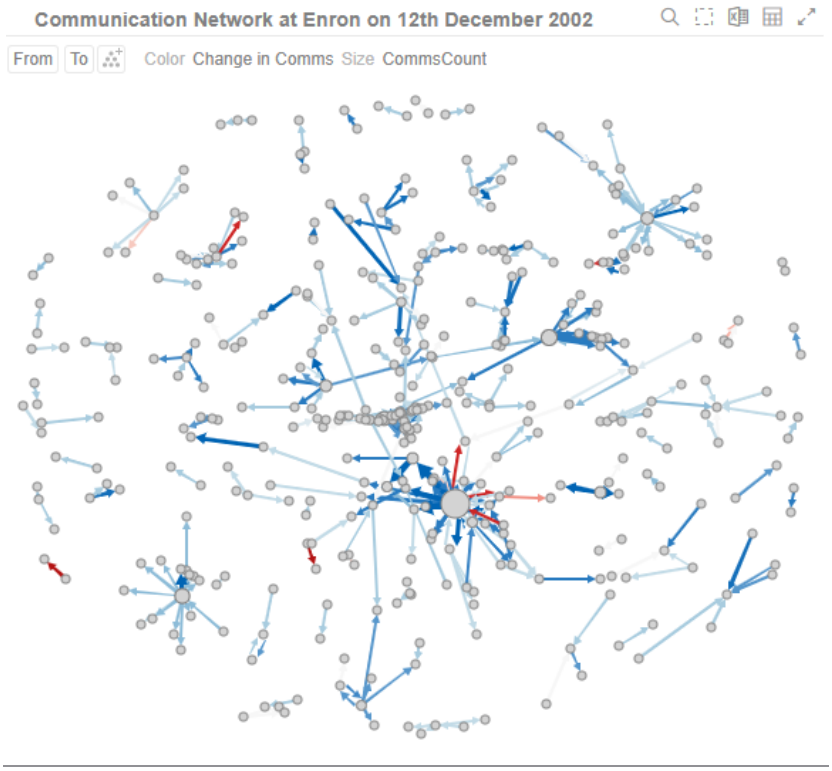


Zooming In and Out with Mouse Wheel

You can use the mouse wheel to zoom in and out on the visualization.

Examples:

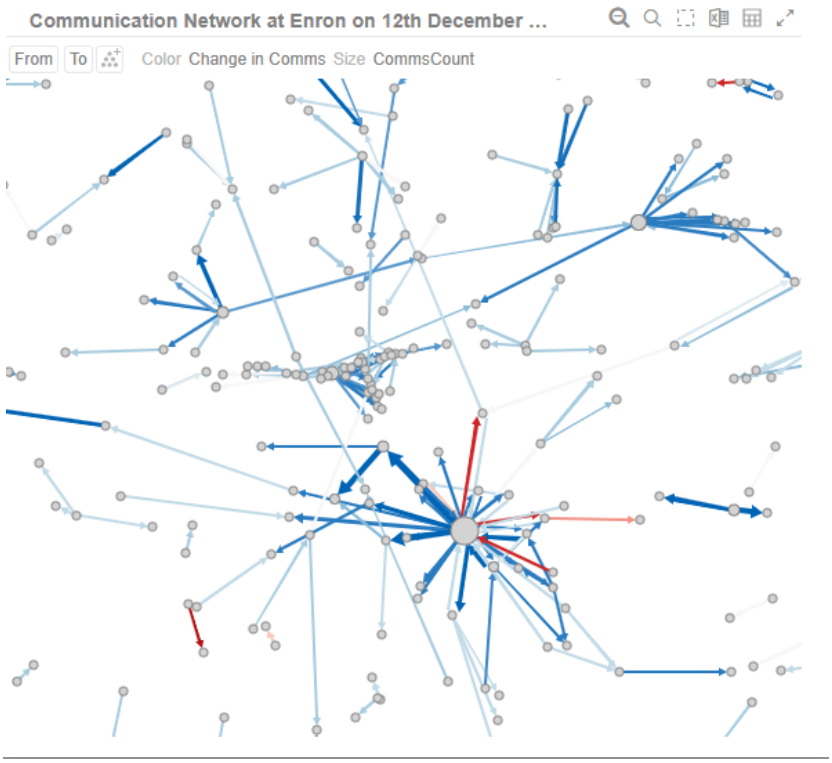
No Zoom



No zoom

Slight Zoom

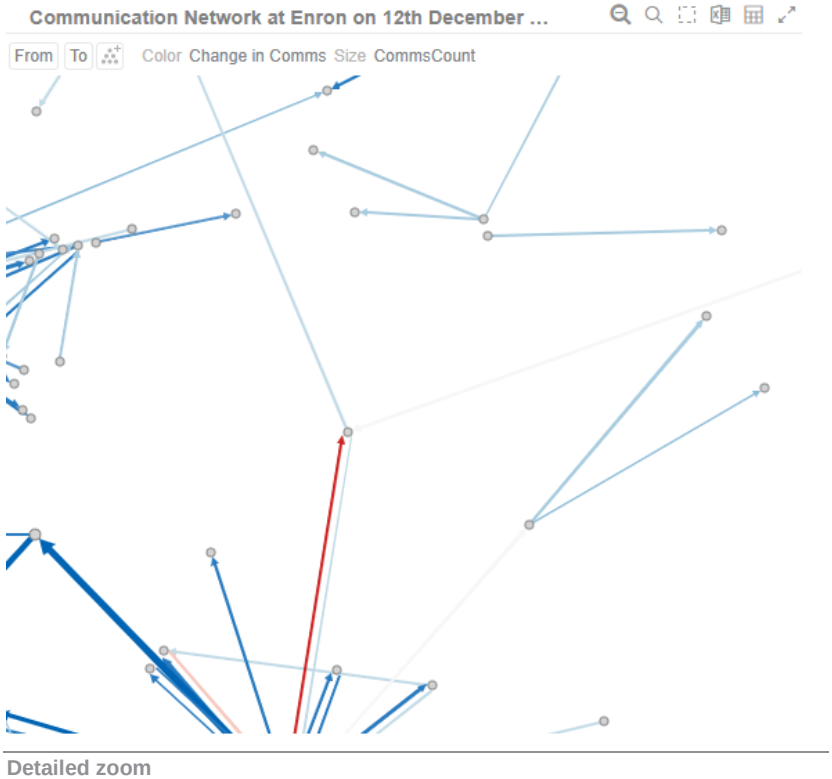
One mouse wheel rotation.



Slight zoom

Detailed Zoom

Several mouse wheel rotations.



Detailed zoom

Panning Around Within the Zoomed Area

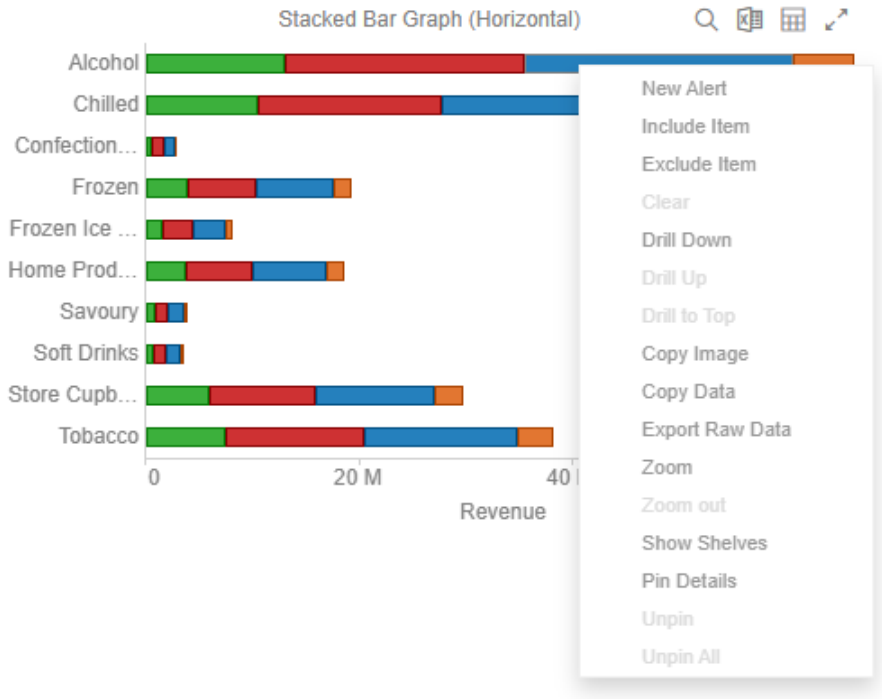
Clicking on the zoomed area turns the mouse pointer into . Drag the mouse to pan around the zoomed area.

Variable Visibility

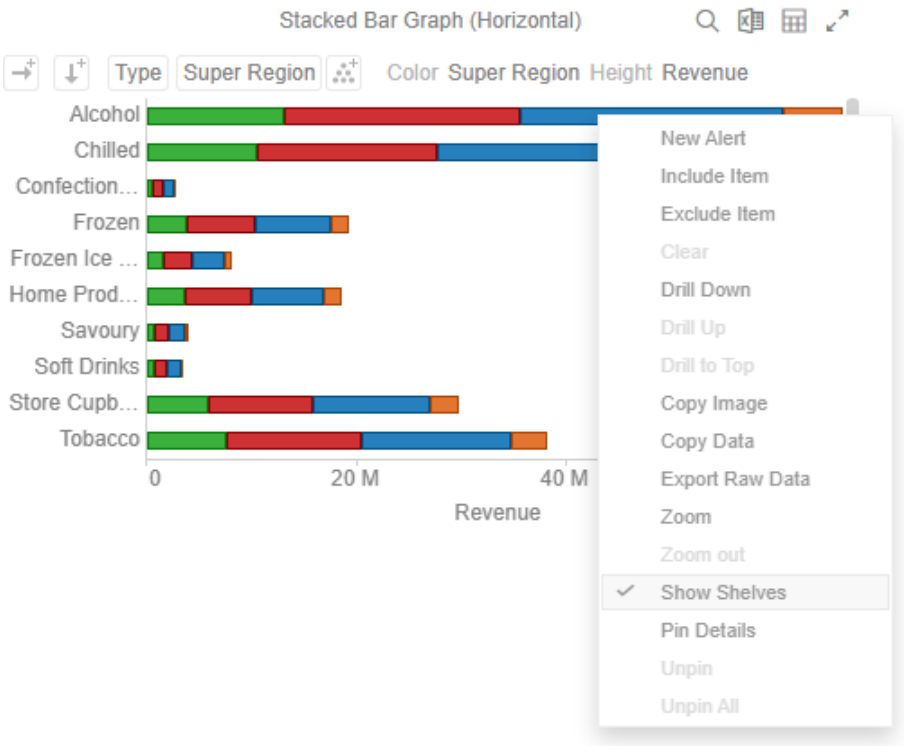
Variable visibility defines whether the visualization cross tab, breakdown, and variable shelves are displayed.

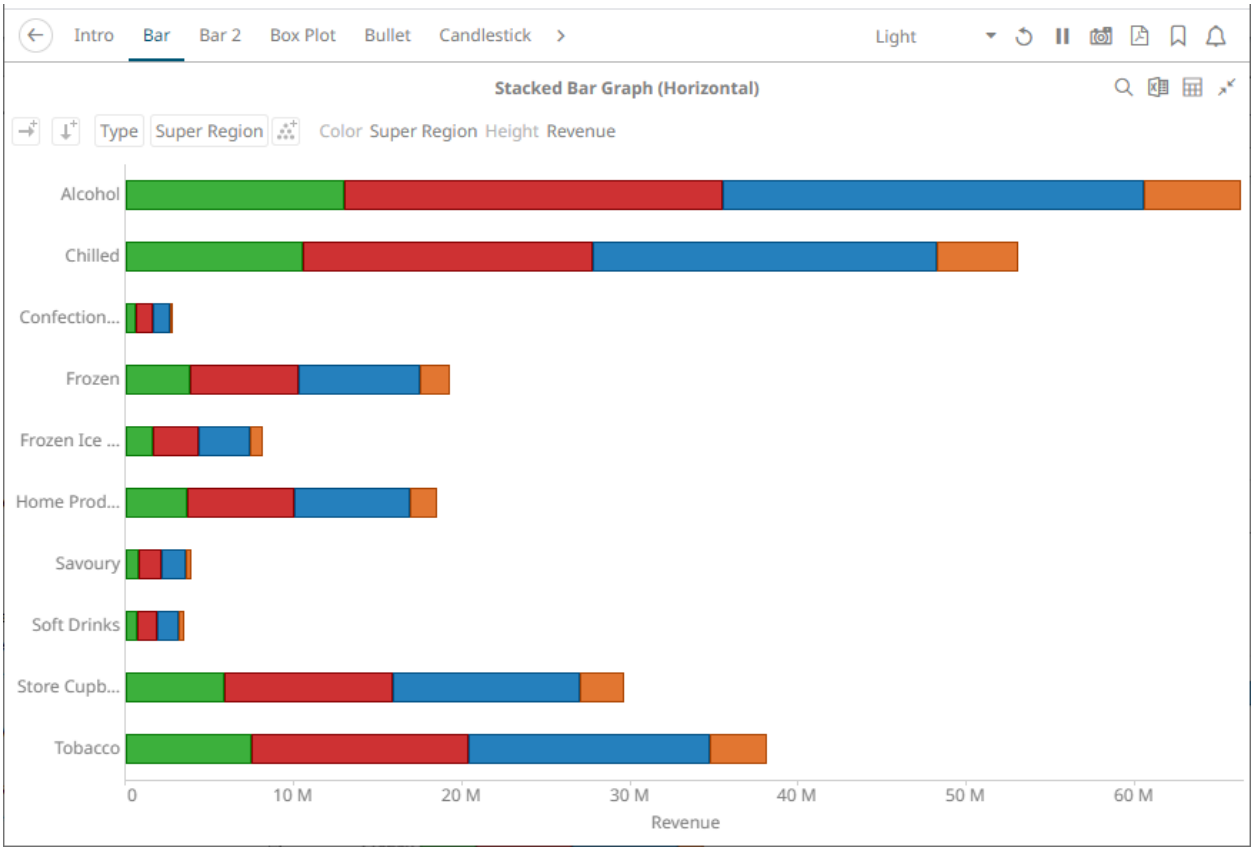
This function is often useful in creating simple views for public websites or executive dashboards.

By default, *Show Shelves* is turned off.



Click *Show Shelves* to select. The shelves are displayed on the visualization.

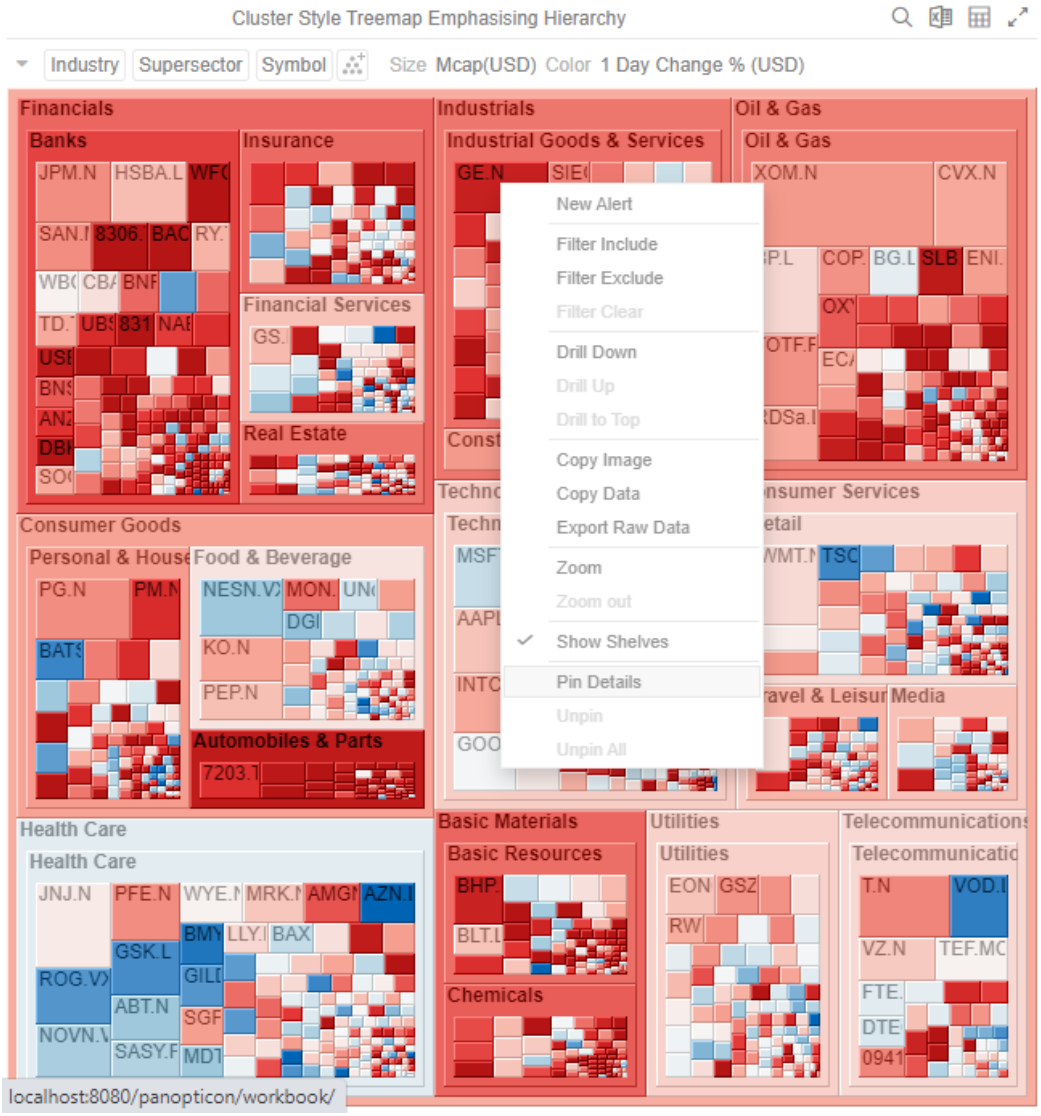

Stacked Bar Graph (Horizontal)
Type
Super Region
Color Super Region Height Revenue
Alcohol
Chilled
Confection...
Frozen
Frozen Ice ...
Home Prod...
Savoury
Soft Drinks
Store Cupb...
Tobacco
0
20 M
40 M
Revenue
New Alert
Include Item
Exclude Item
Clear
Drill Down
Drill Up
Drill to Top
Copy Image
Copy Data
Export Raw Data
Zoom
Zoom out
Show Shelves
Pin Details
Unpin
Unpin All


Intro
Bar
Bar 2
Box Plot
Bullet
Candlestick
Light
Stacked Bar Graph (Horizontal)
Type
Super Region
Color Super Region Height Revenue
Alcohol
Chilled
Confection...
Frozen
Frozen Ice ...
Home Prod...
Savoury
Soft Drinks
Store Cupb...
Tobacco
0
10 M
20 M
30 M
40 M
50 M
60 M
Revenue

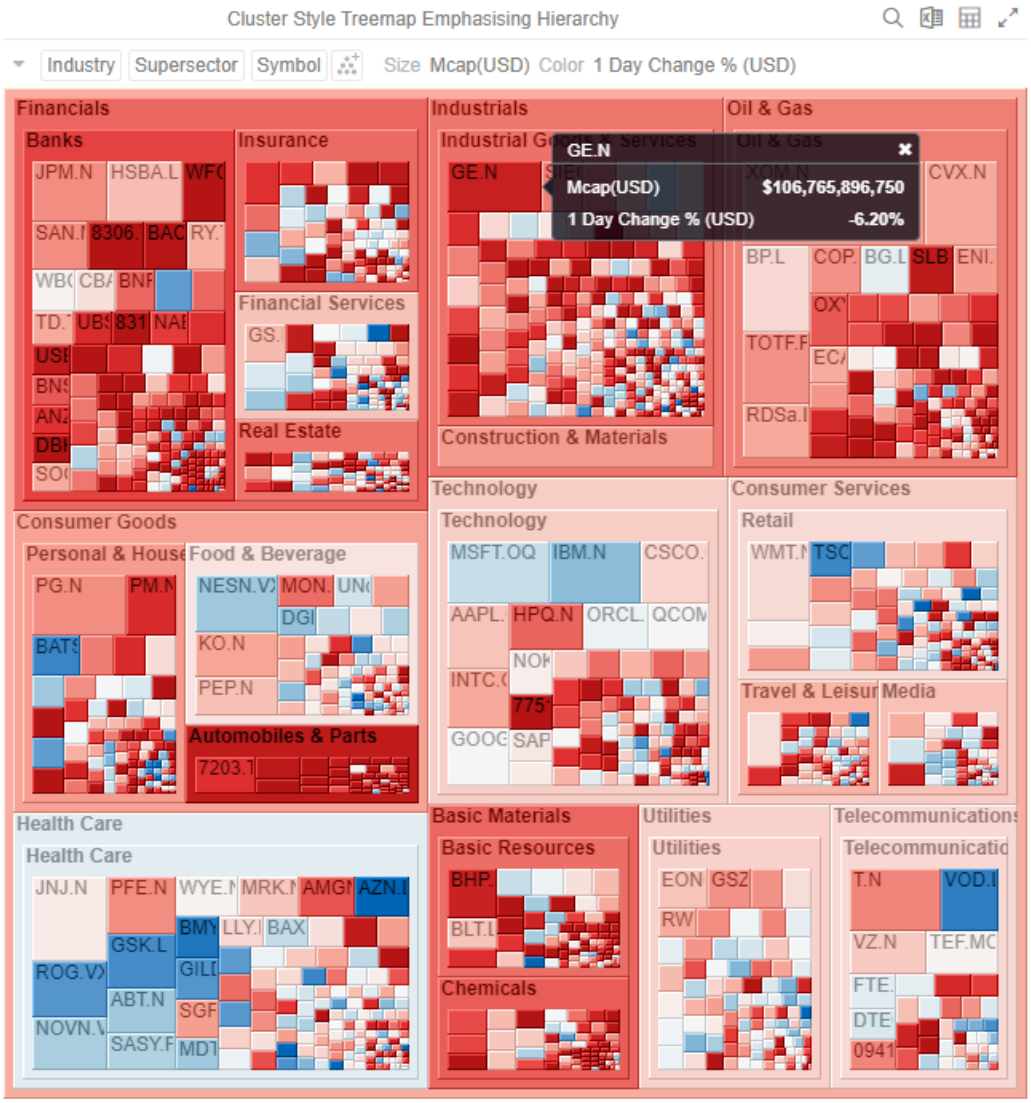
Pinning Details Pop-up

Pinning keeps *Details* pop-up displayed in visualizations which supports easy tracking of some items of interest.

Right-click on a visualization item and select **Pin Details** in the context menu.

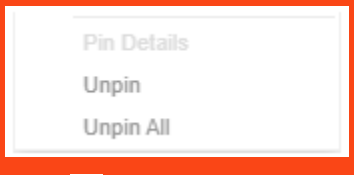


The *Details* pop-up is displayed and pinned.



Repeat until you pin all of the *Details* pop-up that you want to display.

NOTE **The *Pin Details* option in the context menu is disabled once the details of a visualization item or data point is pinned.**



To unpin, you can either click ✖ or right-click on the item and select **Unpin** on the context menu.

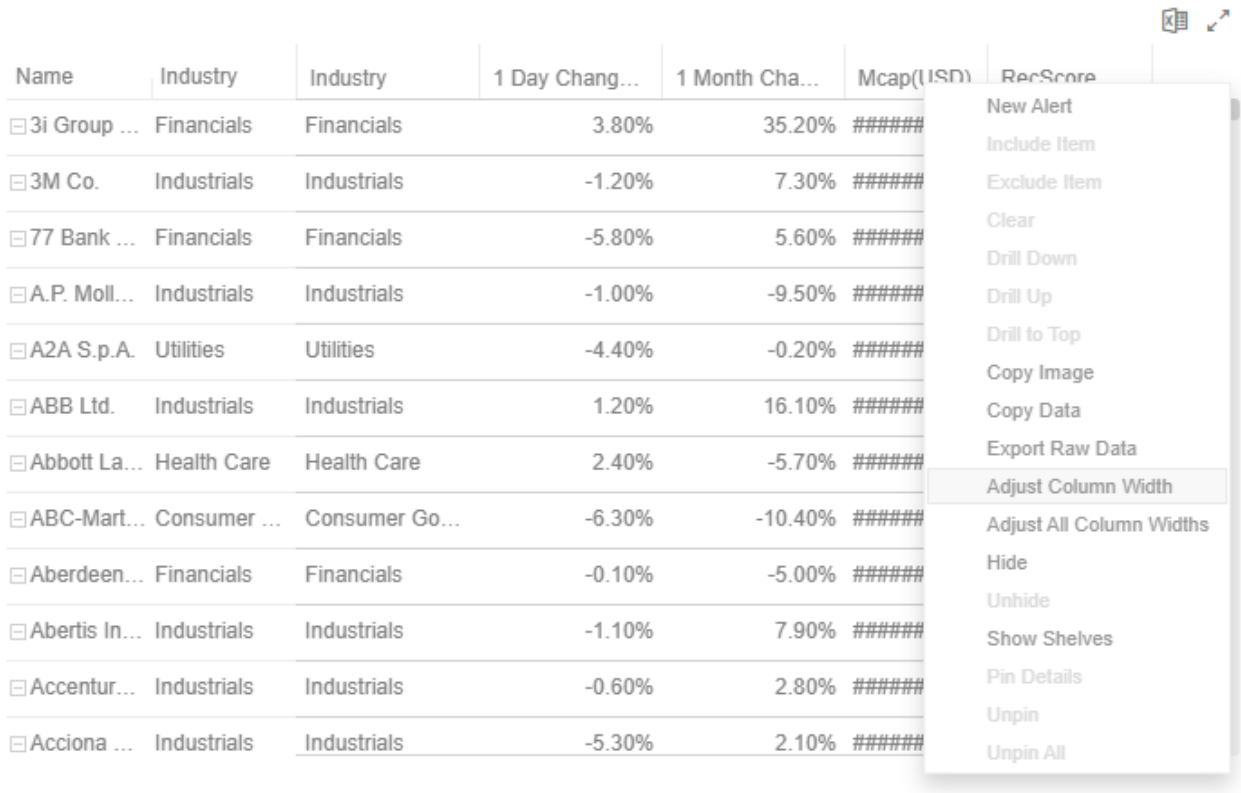
Select **Unpin All** in the context menu to remove all of the pinned *Details* pop-up.

Adjust Column Width in the Table Visualization

For the table visualization, the width of the columns can be automatically adjusted to fit the contents of a column or all of the columns.

Right-click on a column name and then select either:

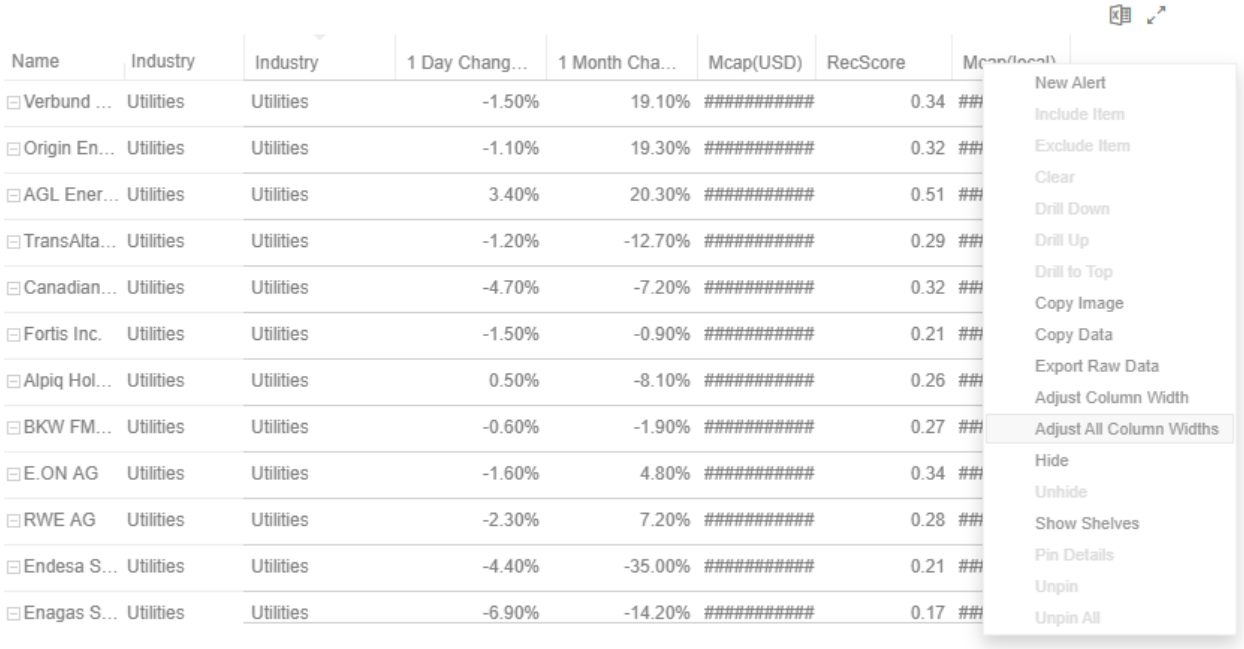
- Adjust Column Width



The column width is adjusted.

Name	Industry	1 Day Chang...	1 Month Cha...	1 Week Chan...	Mcap(USD)	RecScore
3i Group ...	Financials	0.04	0.36	0.01	1,488,911,563.00	0.42
3M Co.	Industrials	-0.01	0.07	0.01	31,869,237,156.00	0.25
77 Bank L...	Financials	-0.06	0.07	-0.03	1,855,149,668.00	0.39
A.P. Molle...	Industrials	-0.01	-0.13	-0.08	4,742,697,140.00	0.32
A2A S.p.A.	Utilities	-0.04	-0.04	-0.05	1,906,029,009.00	0.28
ABB Ltd.	Industrials	0.01	0.13	-0.02	32,461,622,181.00	0.36
Abbott La...	Health Care	0.02	-0.06	-0.02	73,392,451,232.00	0.36
ABC-Mart...	Consumer ...	-0.06	-0.10	-0.03	556,753,517.00	0.26
Aberdeen...	Financials	0.00	-0.05	-0.09	1,310,061,051.00	0.34
Abertis In...	Industrials	-0.01	0.04	-0.04	4,574,542,373.00	0.28
Accentur...	Industrials	-0.01	-0.05	-0.13	17,063,968,693.00	0.37

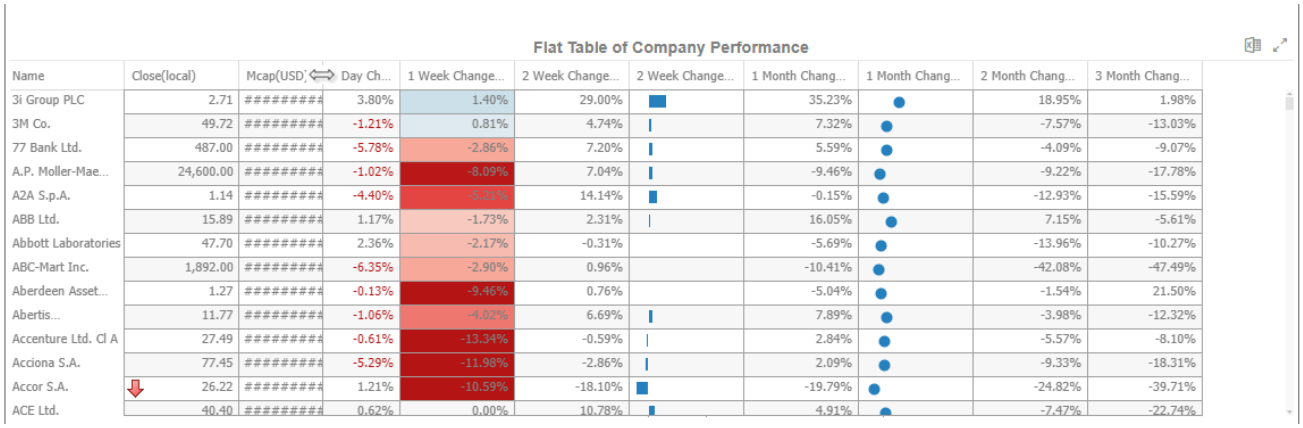
- Adjust All Column Widths



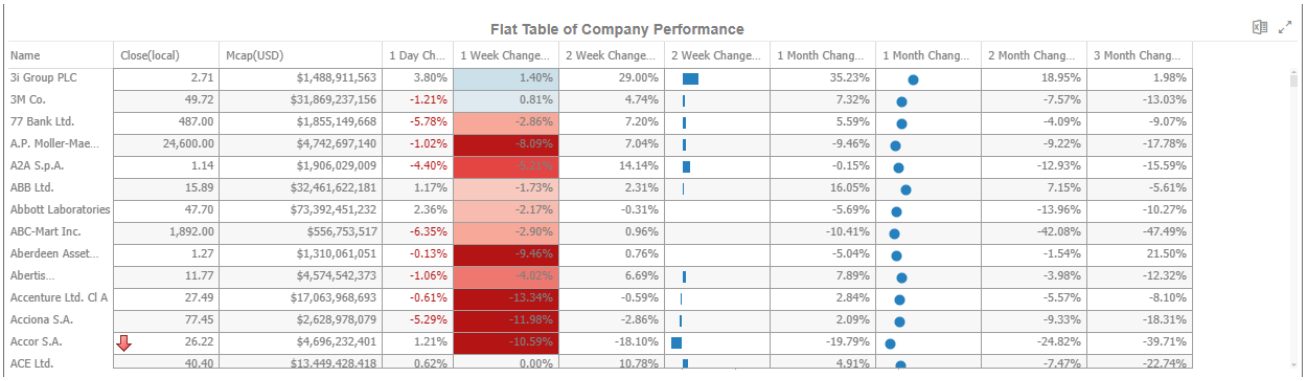
All of the column widths of the table are adjusted.

Aside from selecting either of these context menu options, you can also manually drag the **Left-Right** arrow ⟺ to widen or reduce the width of the columns.

Hover on a column border, the **Left-Right** arrow displays.

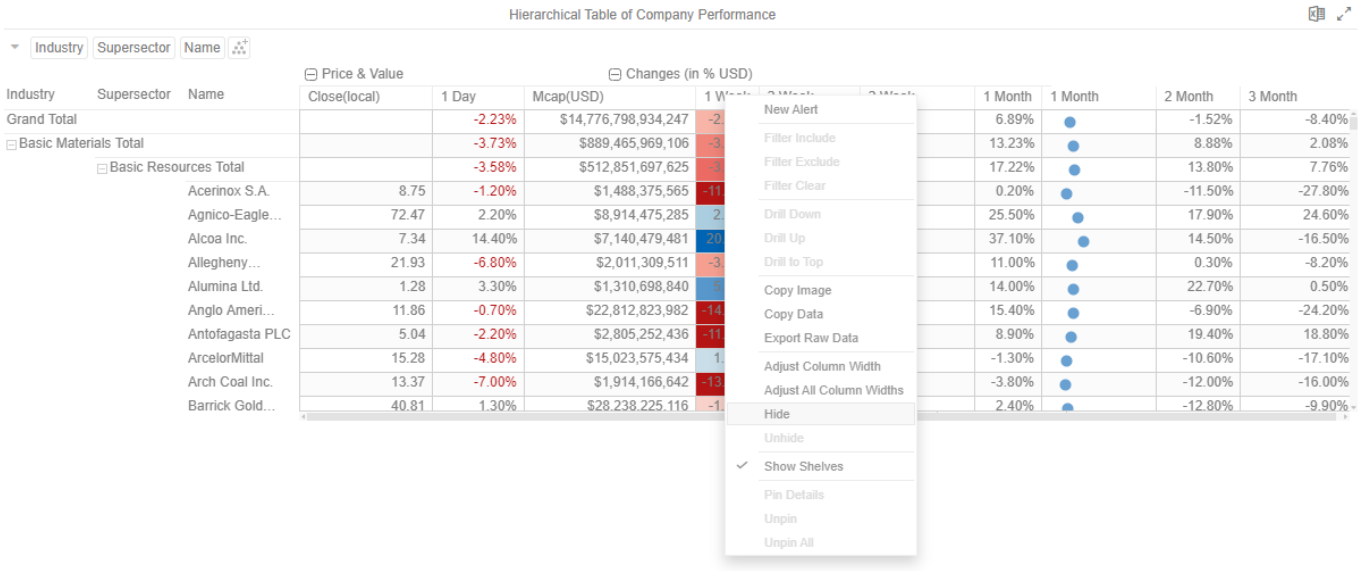


Drag the arrow to the desired width.

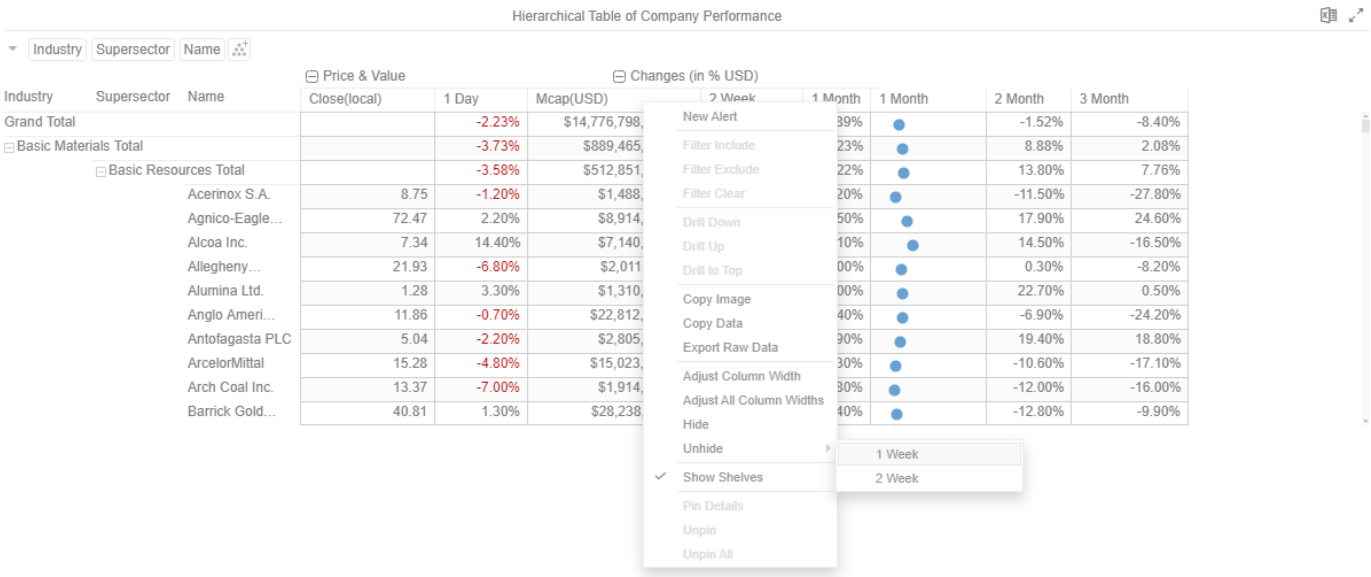


Hide or Display Columns in the Table Visualization

Table visual members can be hidden and displayed again. To hide a column, right-click on a column name and select **Hide**.

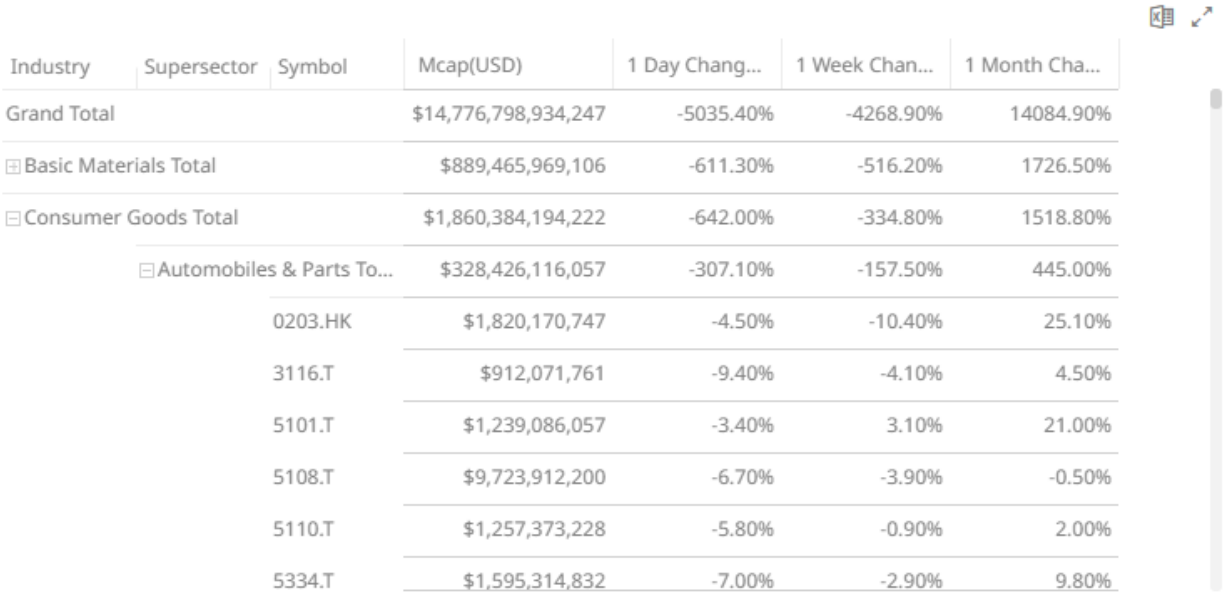


To display the hidden columns, right-click any of the visual members and select **Unhide** **<Column>**



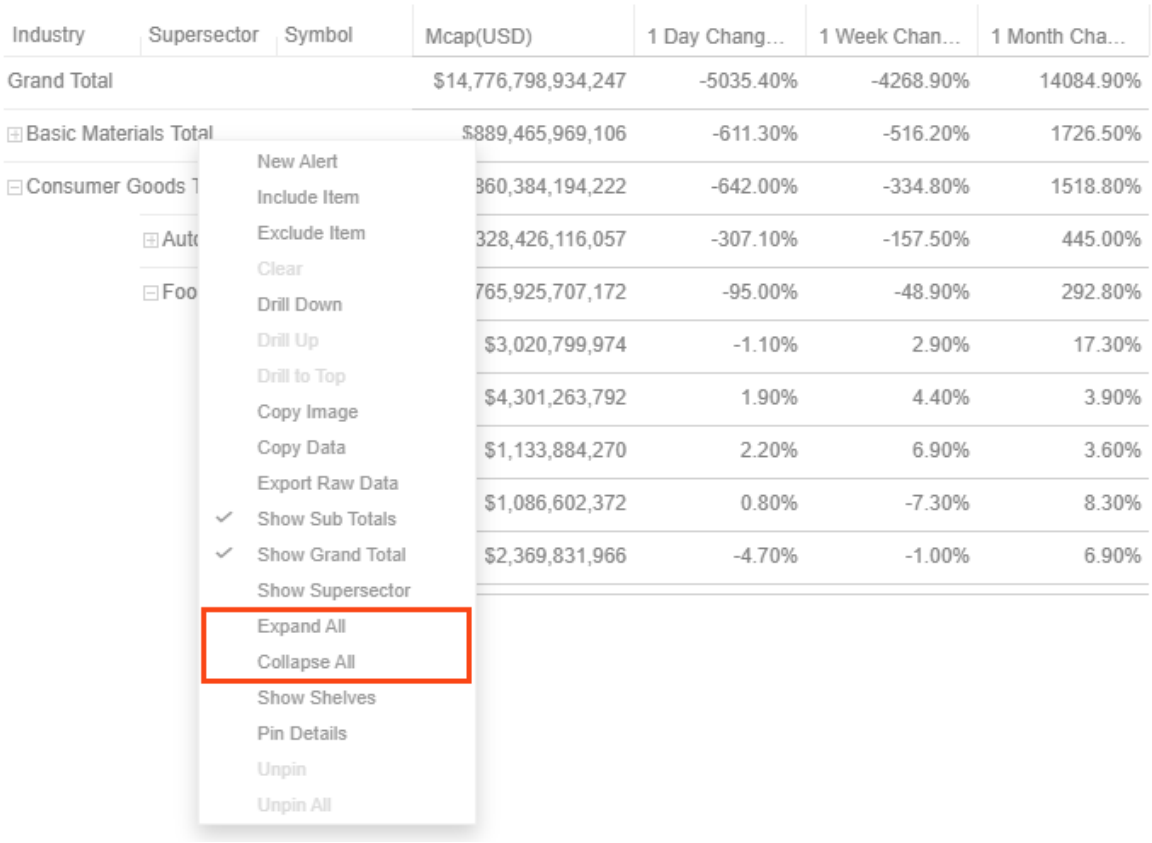
Displaying a Hierarchy Column in the Table Visualization

- Expand or collapse sections of the hierarchy by clicking on the ⊞ to expand, and ⊟ to collapse.

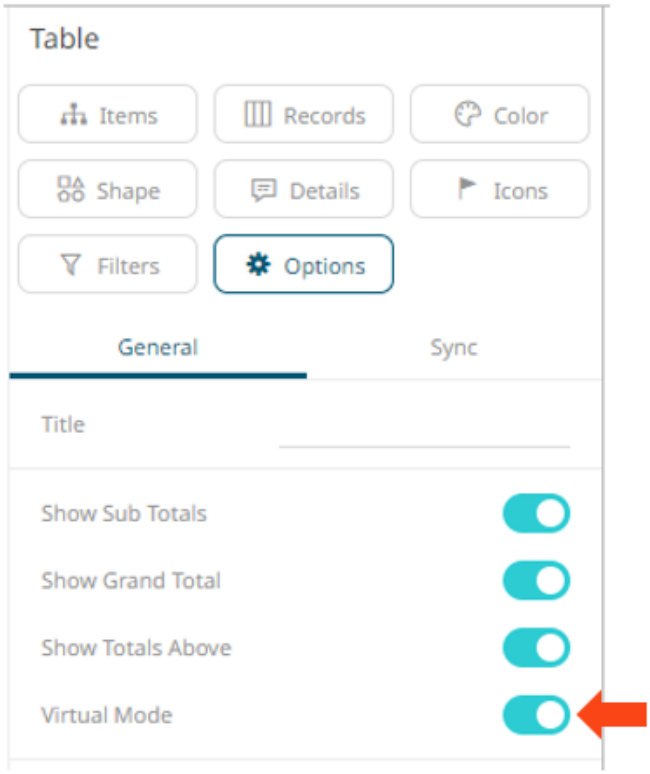


Industry	Supersector	Symbol	Mcap(USD)	1 Day Chang...	1 Week Chan...	1 Month Cha...
Grand Total			$14,776,798,934,247	-5035.40%	-4268.90%	14084.90%
⊞ Basic Materials Total			$889,465,969,106	-611.30%	-516.20%	1726.50%
⊟ Consumer Goods Total			$1,860,384,194,222	-642.00%	-334.80%	1518.80%
	⊟ Automobiles & Parts To...		$328,426,116,057	-307.10%	-157.50%	445.00%
		0203.HK	$1,820,170,747	-4.50%	-10.40%	25.10%
		3116.T	$912,071,761	-9.40%	-4.10%	4.50%
		5101.T	$1,239,086,057	-3.40%	3.10%	21.00%
		5108.T	$9,723,912,200	-6.70%	-3.90%	-0.50%
		5110.T	$1,257,373,228	-5.80%	-0.90%	2.00%
		5334.T	$1,595,314,832	-7.00%	-2.90%	9.80%

Additionally, the right click context menu includes options for **Expand All** and **Collapse All**



However, when the workbook designer turns on the **Virtual Mode** option in the *Table Settings*, the table will be in a flat mode and the expand and collapse options will no longer be available.



Tabular View of Filtered Dataset

Industry | Supersector | Symbol

Industry	Supersector	Symbol	Mcap(USD)	1 Day Change % (USD)	1 Week Change % (USD)	1 Month Change % (USD)
Grand Total			$14,777B	-2.24%	-2.66%	6.89%
Financials Total			$2,547B	-3.75%	-5.23%	12.38%
	Banks Total		$1,366B	-4.46%	-6.46%	14.08%
		JPM.N	$99B	-2.99%	-7.90%	15.31%
		HSBA.L	$97B	-1.79%	-6.51%	7.06%
		WFC.N	$57B	-8.66%	-17.83%	1.22%
		SAN.MC	$56B	-3.02%	-6.64%	7.27%
		8306.T	$56B	-10.36%	-8.39%	7.34%
		BAC.N	$44B	-7.08%	-12.56%	31.65%
		RY.TO	$39B	-2.06%	-5.05%	13.95%
		WBC.AX	$39B	-0.21%	0.08%	27.39%
		CBA.AX	$36B	-0.72%	-1.64%	30.78%
		BNPP.PA	$35B	-3.71%	-11.73%	19.16%
		CSGN.VX	$33B	4.08%	-6.25%	25.58%
		BBVA.MC	$30B	-3.69%	-5.40%	10.51%
		TD.TO	$29B	-2.40%	-6.45%	19.70%
		UBSN.VX	$28B	-5.33%	-19.18%	-6.41%
		8316.T	$27B	-11.87%	-11.58%	10.95%
		NAB.AX	$27B	-4.65%	0.91%	25.22%
		ISP.MI	$27B	-5.14%	-0.95%	16.91%
		USB.N	$25B	-6.59%	-8.63%	-2.01%
		BNS.TO	$24B	-4.00%	-7.95%	5.88%
		ANZ.AX	$24B	-4.79%	2.61%	35.82%
		DBKGn.DE	$23B	-8.17%	-3.42%	44.07%
		SOGN.PA	$23B	-2.37%	-9.22%	17.09%
		8411.T	$22B	-13.62%	-15.80%	-0.86%

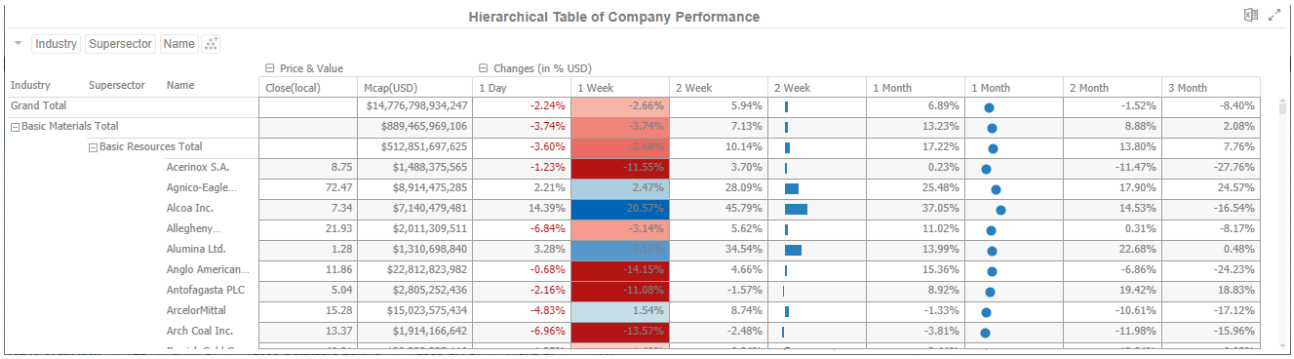
Expanding and collapsing can also be done by selecting specific items to display. Right-click on the item and then select *Show* <*Item*> on the context menu.

Additional Table Operations

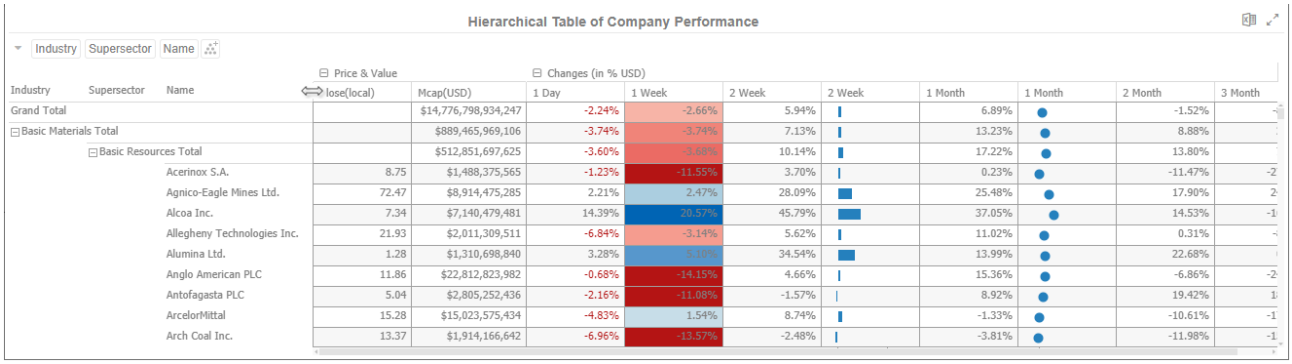
Adjust Width of the Text Axis Leaf in Table Visualizations

In the Table visualization, you can adjust the width of the Text axis leaf by dragging the **Left-Right** arrow ⇔.

For example, in the Table below, the data or fields of the leaf are not fully displayed.

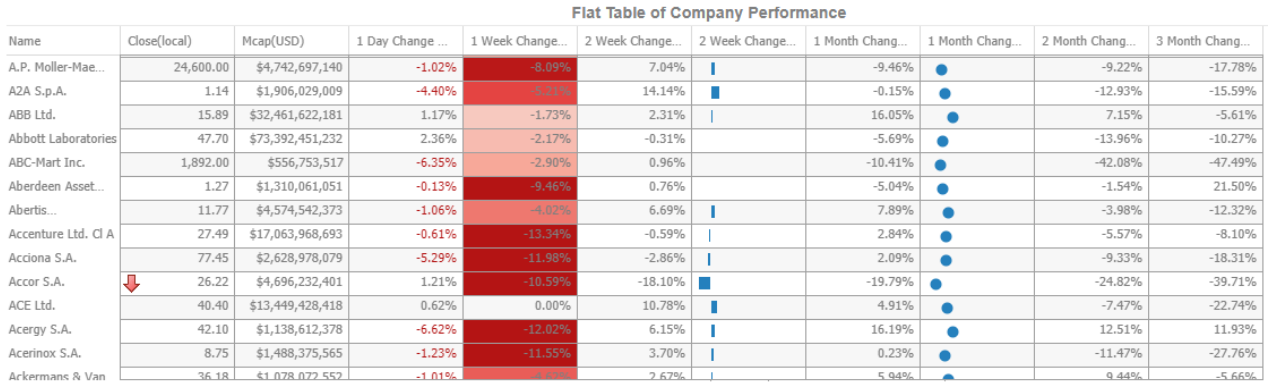


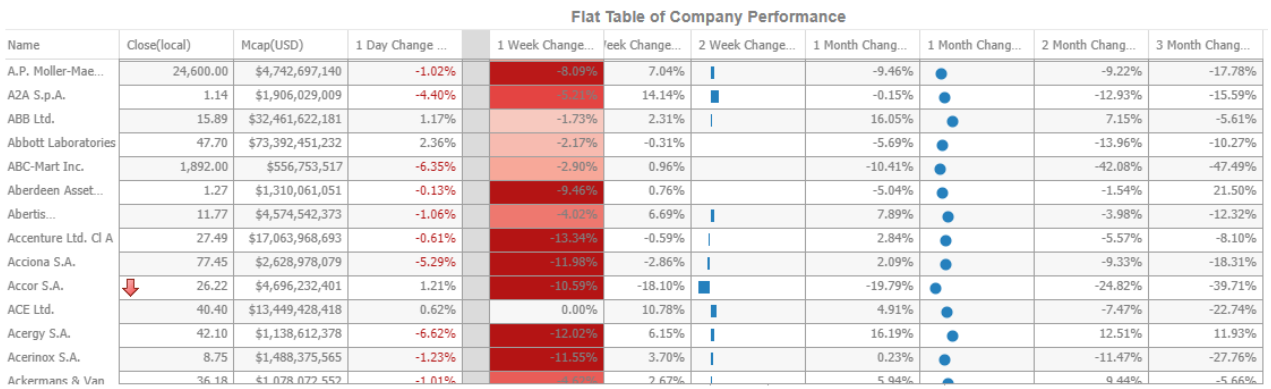
Hover on the border of the Text axis leaf and drag the **Left-Right** arrow to the desired width.



Move Columns in the Table Visualization

Move or re-arrange the columns by dragging them either to the left or to the right.





Flat Table of Company Performance

Name	Close(local)	Mcap(USD)	1 Day Change ...	2 Week Change...	2 Week Change...	1 Month Chang...	1 Week Change...	1 Month Chang...	2 Month Chang...	3 Month Chang...
A.P. Moller-Mae...	24,600.00	$4,742,697,140	-1.02%	7.04%		-9.46%	-8.09%		-9.22%	-17.78%
A2A S.p.A.	1.14	$1,906,029,009	-4.40%	14.14%		-0.15%	-5.21%		-12.93%	-15.59%
ABB Ltd.	15.89	$32,461,622,181	1.17%	2.31%		16.05%	-1.73%		7.15%	-5.61%
Abbott Laboratories	47.70	$73,392,451,232	2.36%	-0.31%		-5.69%	-2.17%		-13.96%	-10.27%
ABC-Mart Inc.	1,892.00	$556,753,517	-6.35%	0.96%		-10.41%	-2.90%		-42.08%	-47.49%
Aberdeen Asset...	1.27	$1,310,061,051	-0.13%	0.76%		-5.04%	-9.46%		-1.54%	21.50%
Abertis...	11.77	$4,574,542,373	-1.06%	6.69%		7.89%	-4.02%		-3.98%	-12.32%
Accenture Ltd. Cl A	27.49	$17,063,968,693	-0.61%	-0.59%		2.84%	-13.34%		-5.57%	-8.10%
Acciona S.A.	77.45	$2,628,978,079	-5.29%	-2.86%		2.09%	-11.98%		-9.33%	-18.31%
Accor S.A.	26.22	$4,696,232,401	1.21%	-18.10%		-19.79%	-10.59%		-24.82%	-39.71%
ACE Ltd.	40.40	$13,449,428,418	0.62%	10.78%		4.91%	0.00%		-7.47%	-22.74%
Acergy S.A.	42.10	$1,138,612,378	-6.62%	6.15%		16.19%	-12.02%		12.51%	11.93%
Acerinox S.A.	8.75	$1,488,375,565	-1.23%	3.70%		0.23%	-11.55%		-11.47%	-27.76%
Ackermans & Van	36.18	$1,078,072,552	-1.01%	2.67%		5.94%	-4.58%		9.44%	-5.66%

Visual Table Sorting

The table visualization additionally supports easy column sorting. Clicking on the column heading will sort on that column throughout the selected hierarchy. Clicking again will reverse the sort order (Ascending → Descending).

Performance by Company

Symbol

Symbol	Name	Forex	Close(local)	Mcap(local)	Mcap(USD)	1 Day Change % (USD)	1 Week Change % (USD)	2 Week Change % (USD)	1 Month Change % (USD)
III.L	3i Group PLC	GBP	2.71	1,038,763,431	$1,488,911,563	3.8%	1.4%	29.0%	35.2%
MMM.N	3M Co.	USD	49.72	31,869,237,156	$31,869,237,156	-1.2%	0.8%	4.7%	7.3%
MAERSKb.CO	A.P. Moller-Maersk A/S Series B	DKK	24,600.00	26,605,819,548	$4,742,697,140	-1.0%	-8.1%	7.0%	-9.5%
A2.MI	A2A S.p.A.	EUR	1.14	1,435,587,112	$1,906,029,009	-4.4%	-5.2%	14.1%	-0.2%
ABBN.VX	ABB Ltd.	CHF	15.89	36,909,178,148	$32,461,622,181	1.2%	-1.7%	2.3%	16.1%
ABT.N	Abbott Laboratories	USD	47.70	73,392,451,232	$73,392,451,232	2.4%	-2.2%	-0.3%	-5.7%
ADN.L	Aberdeen Asset Management PLC	GBP	1.27	913,985,455	$1,310,061,051	-0.1%	-9.5%	0.8%	-5.0%
ABE.MC	Abertis Infraestructuras S.A.	EUR	11.77	3,445,463,864	$4,574,542,373	-1.1%	-4.0%	6.7%	7.9%
ACN.N	Accenture Ltd. Cl A	USD	27.49	17,063,968,693	$17,063,968,693	-0.6%	-13.3%	-0.6%	2.8%
ANA.MC	Acciona S.A.	EUR	77.45	1,980,099,479	$2,628,978,079	-5.3%	-12.0%	-2.9%	2.1%
ACCP.PA	Accor S.A.	EUR	26.22	3,537,118,627	$4,696,232,401	1.2%	-10.6%	-18.1%	-19.8%
ACE.N	ACE Ltd.	USD	40.40	13,449,428,418	$13,449,428,418	0.6%	0.0%	10.8%	4.9%
ACY.OL	Acergy S.A.	NOK	42.10	7,688,024,637	$1,138,612,378	-6.6%	-12.0%	6.1%	16.2%

Performance by Company

Symbol

Symbol	Name	Forex	Close(local)	Mcap(local)	Mcap(USD)	1 Day Change % (USD)	1 Week Change % (USD)	2 Week Change % (USD)	1 Month Change % (USD)
ZURN.VX	Zurich Financial Services AG	CHF	180.10	25,595,996,783	$22,511,679,170	-1.7%	-6.1%	22.4%	6.7%
ZON.LS	ZON Multimedia-Servicos de Telecom...	EUR	4.01	751,743,577	$998,089,947	3.1%	-3.0%	6.8%	5.9%
ZODC.PA	Zodiac Aerospace	EUR	19.09	843,062,436	$1,119,333,997	-1.0%	-2.5%	-21.0%	-18.1%
ZMH.N	Zimmer Holdings Inc.	USD	36.50	8,220,929,858	$8,220,929,858	-3.5%	0.6%	-0.9%	-1.8%
ZOT.MC	Zardoya Otis S.A.	EUR	13.77	1,654,924,327	$2,197,243,029	4.9%	2.1%	6.6%	7.4%
YUM.N	Yum! Brands Inc.	USD	27.48	12,711,093,703	$12,711,093,703	-4.6%	-3.9%	3.1%	2.9%
YTY1V.HE	YIT Oyj	EUR	5.05	578,101,957	$767,545,969	-6.3%	-9.3%	-8.1%	-3.6%
YAR.OL	Yara International ASA	NOK	147.25	27,392,192,701	$4,056,840,493	-6.1%	-11.5%	0.4%	-4.3%
YRI.TO	Yamana Gold Inc.	CAD	11.77	8,625,585,650	$6,855,768,907	2.6%	1.1%	21.4%	12.5%
YHOO.OQ	Yahoo! Inc.	USD	12.81	16,528,216,407	$16,528,216,407	-2.8%	-9.3%	-3.1%	-1.3%
XTO.N	XTO Energy Inc.	USD	30.62	17,662,160,026	$17,662,160,026	-4.3%	-13.4%	0.3%	-4.2%
XTA.L	Xstrata PLC	GBP	4.67	8,973,684,703	$12,862,430,969	-1.6%	-2.8%	21.8%	113.5%
XLNX.OQ	Xilinx Inc.	USD	19.16	5,296,730,766	$5,296,730,766	-1.7%	-5.4%	4.2%	7.8%

Setting Snapshot Time in a Time Series Visualization

A time series visualization consists of a series of time slices, within a defined time window. The snapshot time identifies a particular slice, which can be highlighted further in separate visualizations.

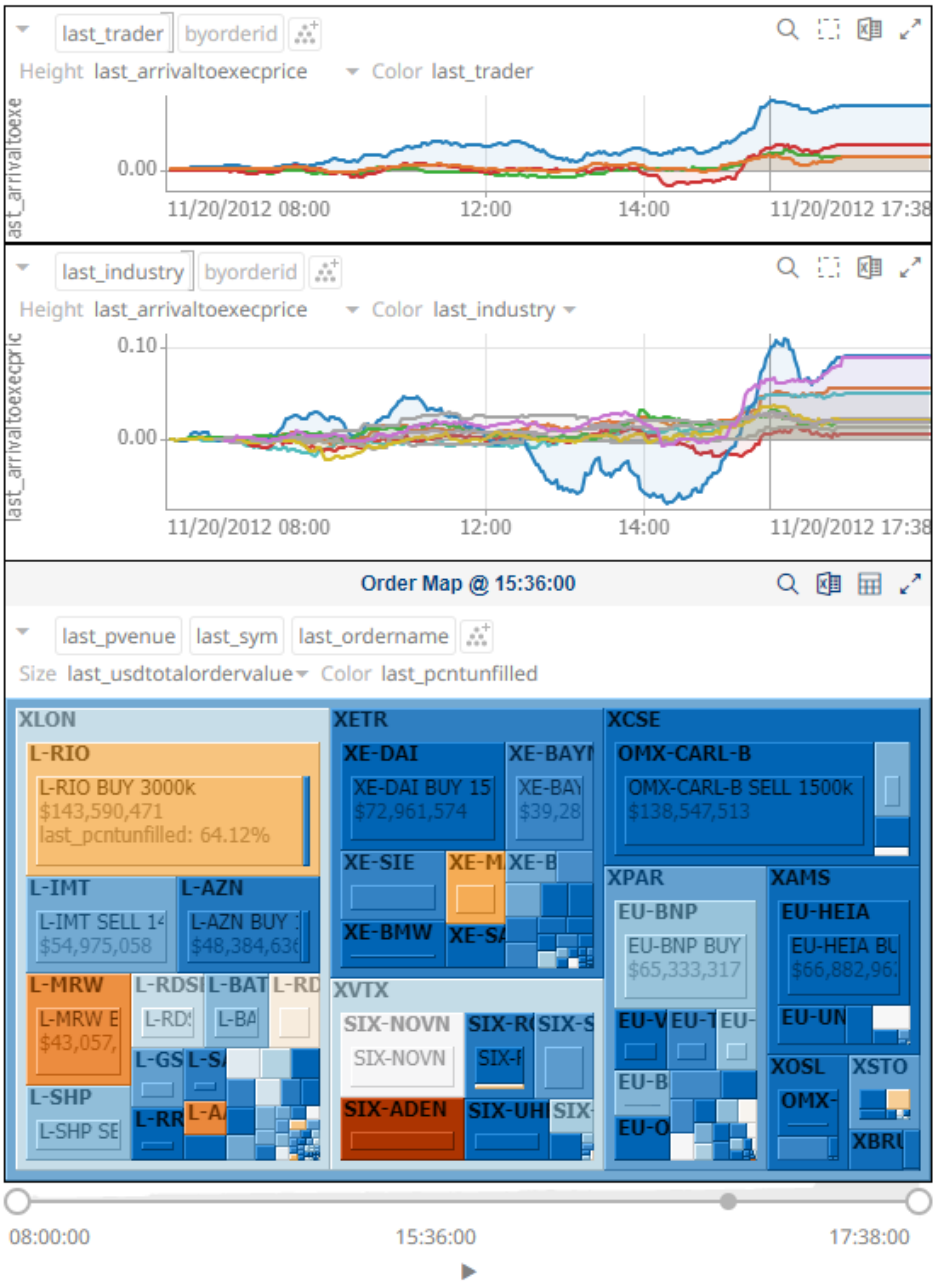
The snapshot is highlighted on the time series visualization through the aid of a vertical grid line.

The snapshot can be selected to focus on particular spikes or abnormalities in the data through either:

- Moving the snapshot on the time filter
- Right-clicking on the graph, and selecting **Set snapshot here**

The snapshot will be set for the selected time.

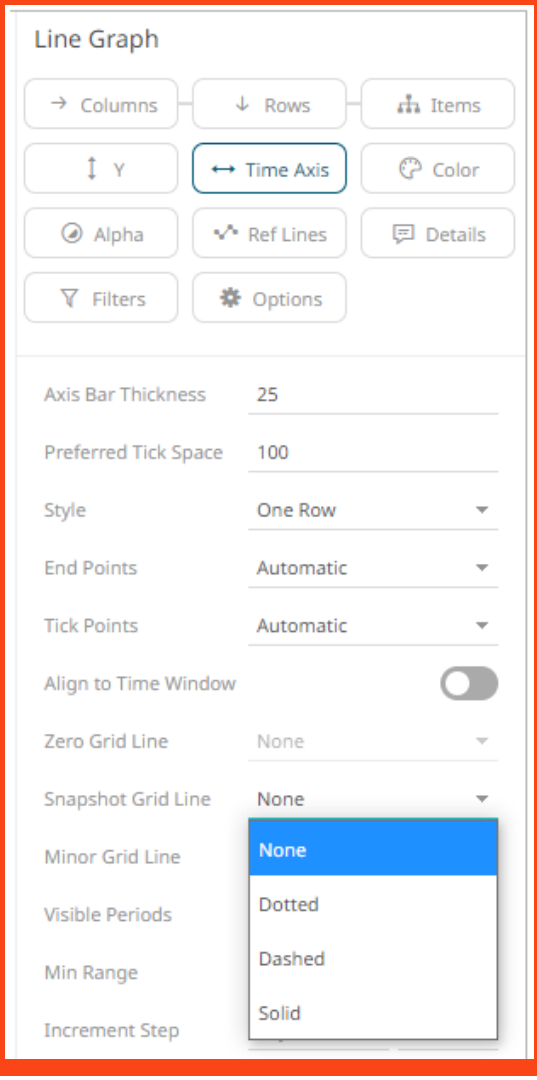
Setting the snapshot can also be displayed on the associated Time Filter Box of a time series visualization.



You can also drag the snapshot line anywhere in the visualization. Hover your mouse on the snapshot line and move it either to the left or to the right.

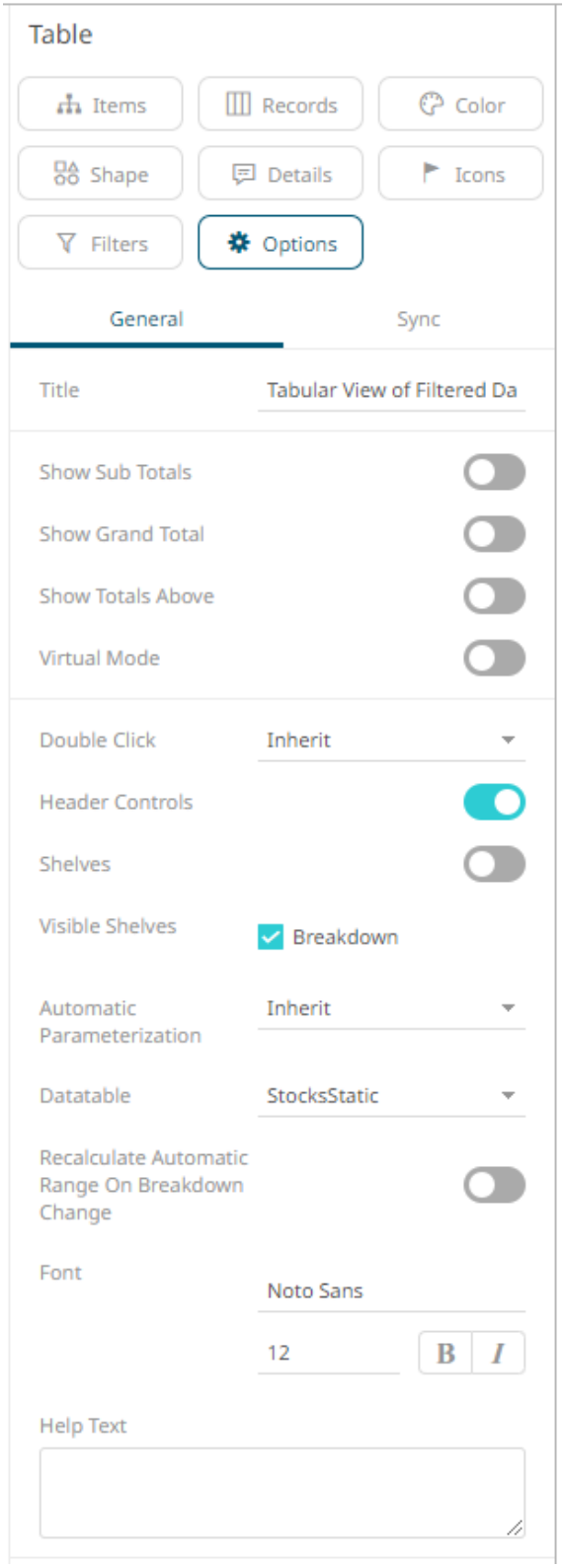
NOTE

The Set Snapshot Here option is only available in the time series visualization context menu when the *Snapshot Grid Line* is rendered or set to Dotted, Dashed, or Solid in the Time Axis variable.



Visualization Header Controls

Header controls are made available in visualizations when the **Header Controls** option is turned on by the workbook designer.



Header controls may include:

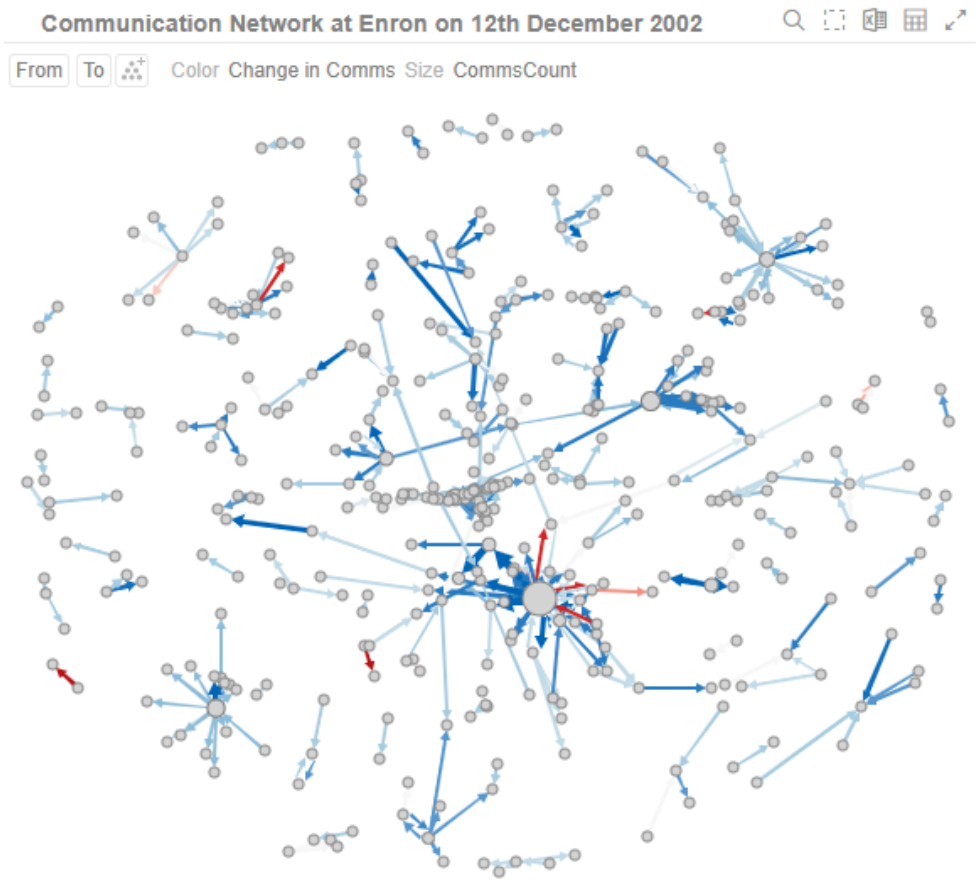
Header Control	Description
Rubber Band Zoom	Allows zooming in on multiple items of interest in a visualization.
Rubber Band Selection	Allows multiple items in a visualization to be selected or lassoed.
Export Excel	Exports static visualizations to a CSV-format file.
Toggle Display Mode	Displays a visualization as a table and vice versa.
Maximize	Maximizes the visualization to be displayed on the full dashboard area.

Exporting to Excel (TSV-format) of Visualizations

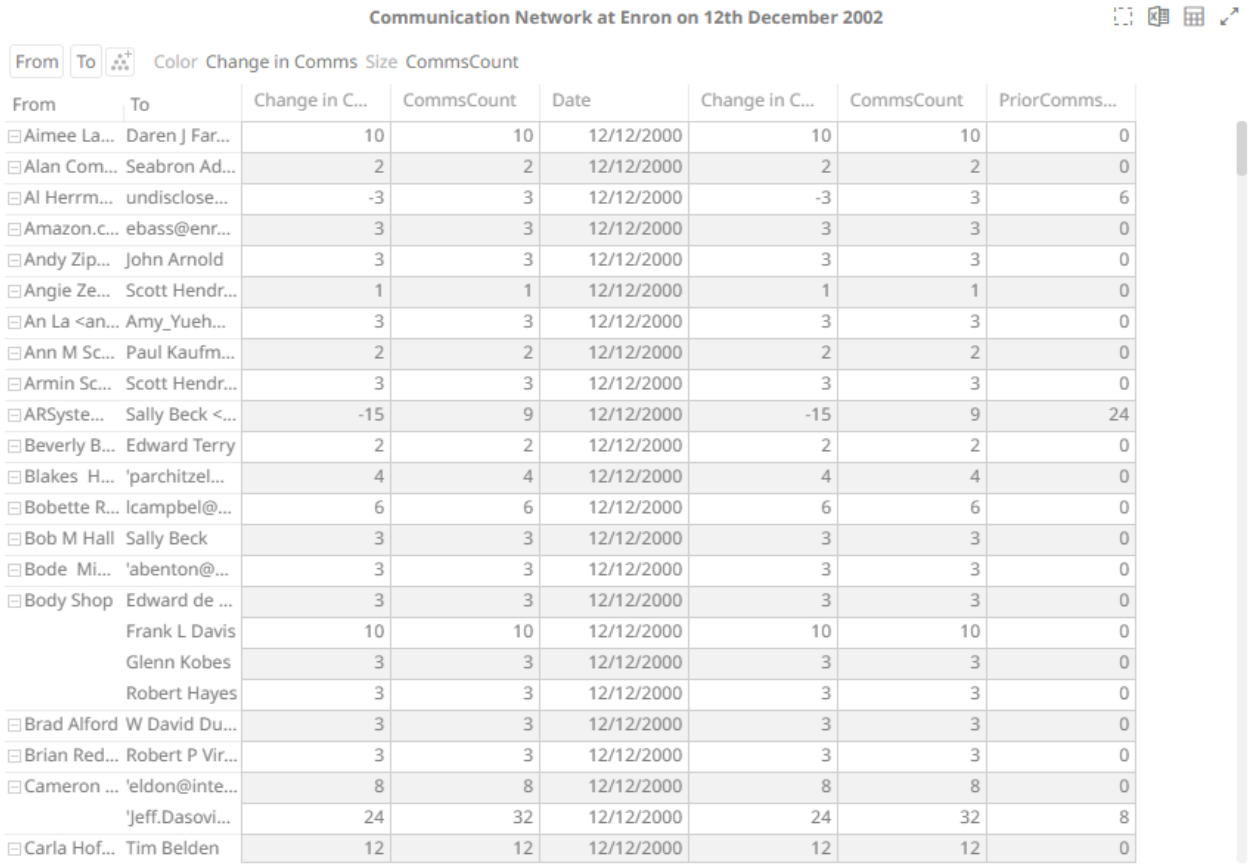
Click the **Export Excel** icon of a static visualization. A copy of the CSV-format tile is downloaded.

Toggling Between a Visualization and a Table

Click the **Toggle Display Mode** icon of a visualization.



It will be replaced with a Table visualization.



From	To	Change in C...	CommsCount	Date	Change in C...	CommsCount	PriorComms...
Aimee La...	Daren J Far...	10	10	12/12/2000	10	10	0
Alan Com...	Seabron Ad...	2	2	12/12/2000	2	2	0
Al Herrm...	undisclose...	-3	3	12/12/2000	-3	3	6
Amazon.c...	ebass@enr...	3	3	12/12/2000	3	3	0
Andy Zip...	John Arnold	3	3	12/12/2000	3	3	0
Angie Ze...	Scott Hendr...	1	1	12/12/2000	1	1	0
An La <an...	Amy_Yueh...	3	3	12/12/2000	3	3	0
Ann M Sc...	Paul Kaufm...	2	2	12/12/2000	2	2	0
Armin Sc...	Scott Hendr...	3	3	12/12/2000	3	3	0
ARSyste...	Sally Beck <...	-15	9	12/12/2000	-15	9	24
Beverly B...	Edward Terry	2	2	12/12/2000	2	2	0
Blakes H...	'parchitzel...	4	4	12/12/2000	4	4	0
Bobette R...	lcampbel@...	6	6	12/12/2000	6	6	0
Bob M Hall	Sally Beck	3	3	12/12/2000	3	3	0
Bode Mi...	'abenton@...	3	3	12/12/2000	3	3	0
Body Shop	Edward de ...	3	3	12/12/2000	3	3	0
	Frank L Davis	10	10	12/12/2000	10	10	0
	Glenn Kobes	3	3	12/12/2000	3	3	0
	Robert Hayes	3	3	12/12/2000	3	3	0
Brad Alford	W David Du...	3	3	12/12/2000	3	3	0
Brian Red...	Robert P Vir...	3	3	12/12/2000	3	3	0
Cameron ...	'eldon@inte...	8	8	12/12/2000	8	8	0
	'Jeff.Dasovi...	24	32	12/12/2000	24	32	8
Carla Hof...	Tim Belden	12	12	12/12/2000	12	12	0

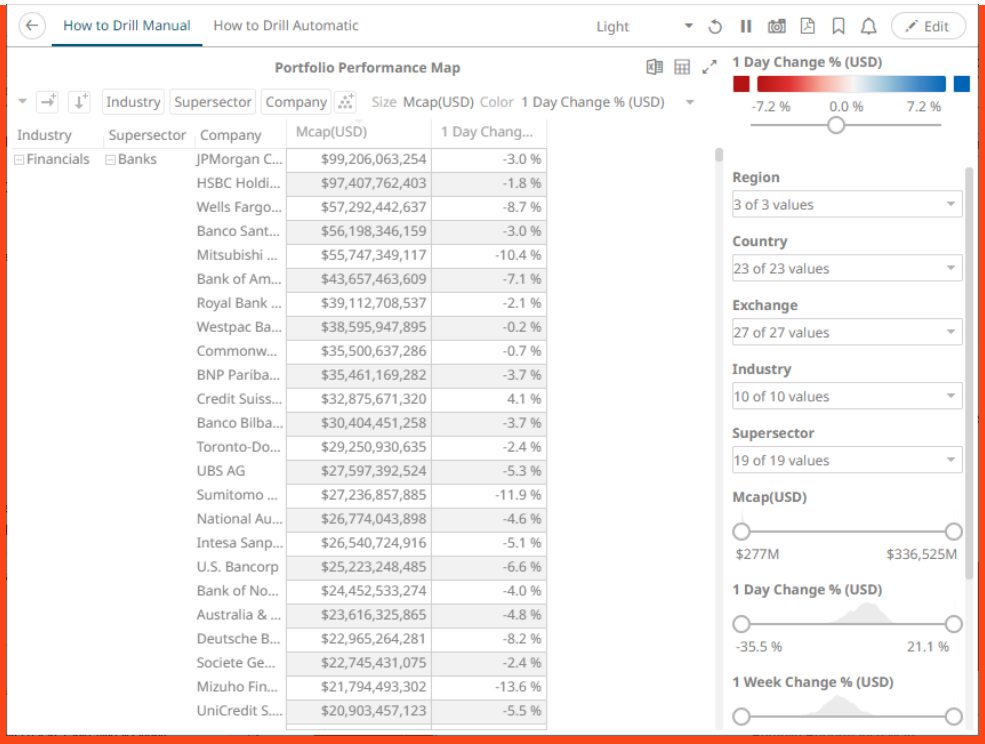
The Table details display the same breakdowns of the original visualization and all the visualization detail variables as visible members of the Table.

NOTE **The Table will default to displaying zebra stripes.**

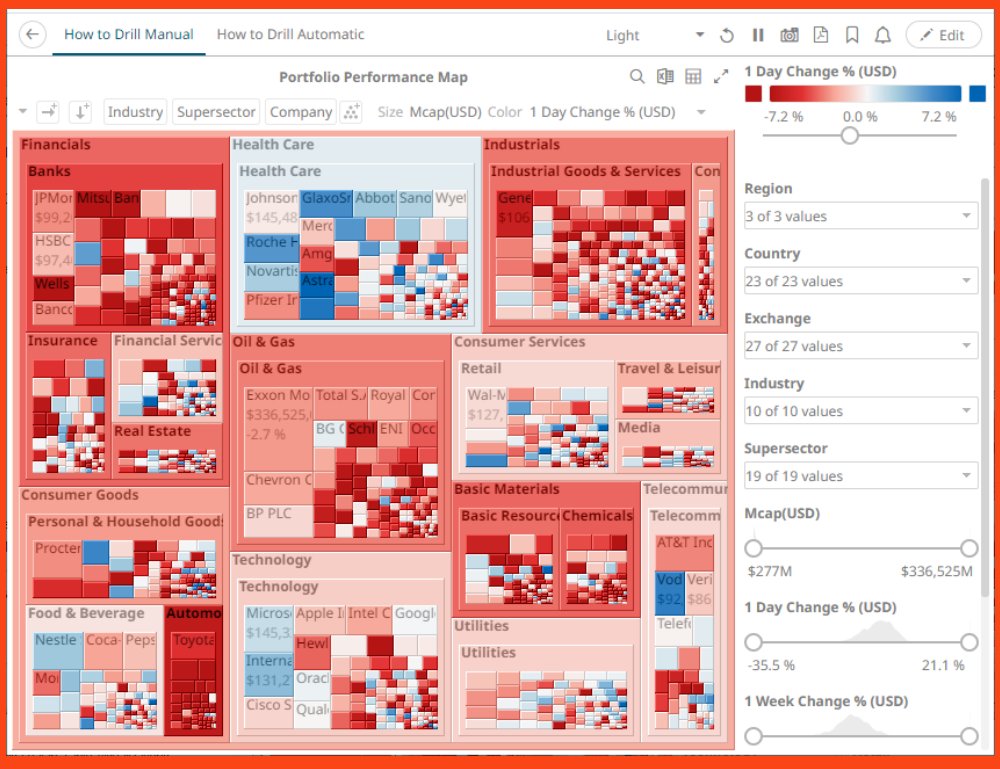
When the **Toggle Display Mode** icon is clicked again, the Table will toggle back to the original visualization.

NOTE

- **Closing and opening the dashboard will revert to the original visualization.**
- **Changing dashboard tabs will revert to the original visualization.**
- **Applying filters on the dashboard will not cause the Table to be toggled back to a visualization but will display the filtered view of the Table. For example: Industry = Basic Materials and Telecommunications**

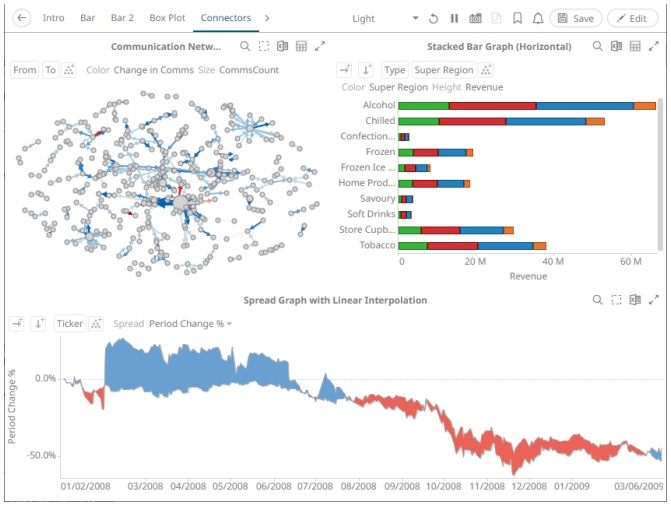


Consequently, toggling back will then display the filtered view of the visualization. The example below will only display Basic Materials and Telecommunications.

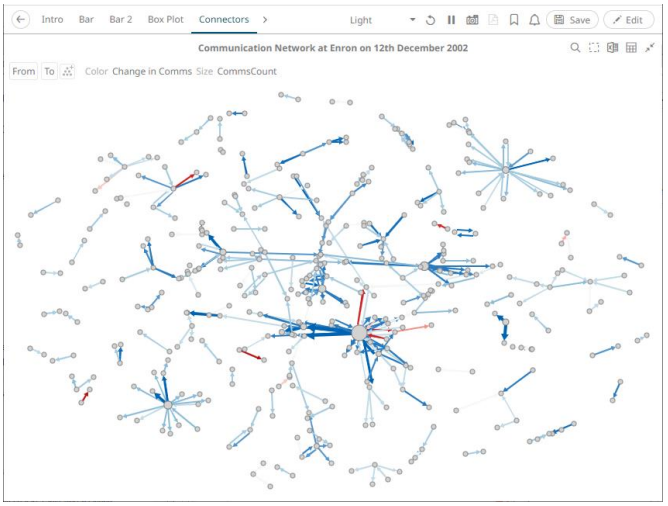


Maximize

Visualizations can be maximized to display the full dashboard area by clicking the **Maximize** icon. To return to normal, click the visualization **Restore** icon.



Before clicking Maximize

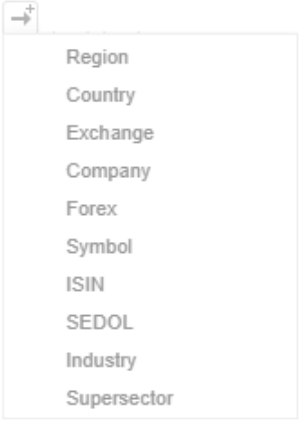


After clicking Maximize

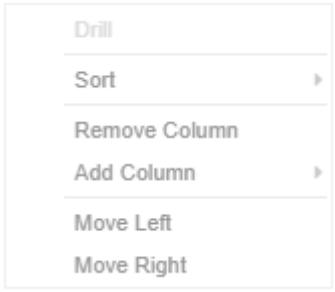
Drilling Into, Sorting, Removing, Adding, and Swapping Columns in a Breakdown and Cross Tab Points

If there are no available columns added as a breakdown or cross tab *Row* or *Column*, click the corresponding icon to display and select from the list of text columns available on the associated data table of the visualization.

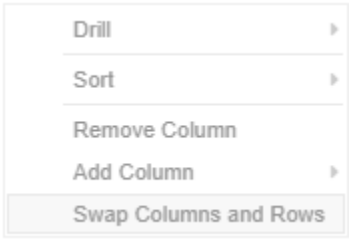
For example:



Right-clicking on a *Breakdown* column displays this context menu.



Right-clicking on a cross tab *Row* or *Column* displays this context menu.

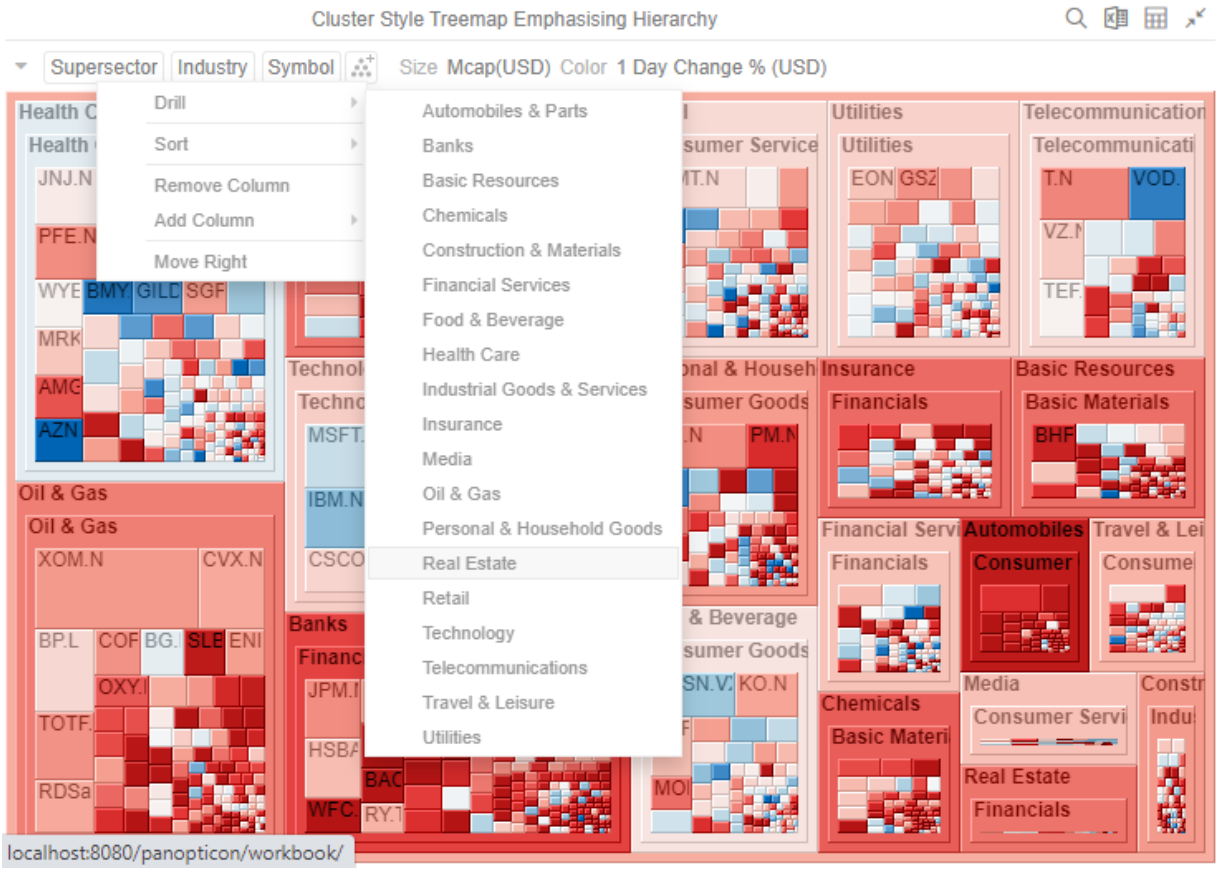


Drilling into Hierarchy Displays

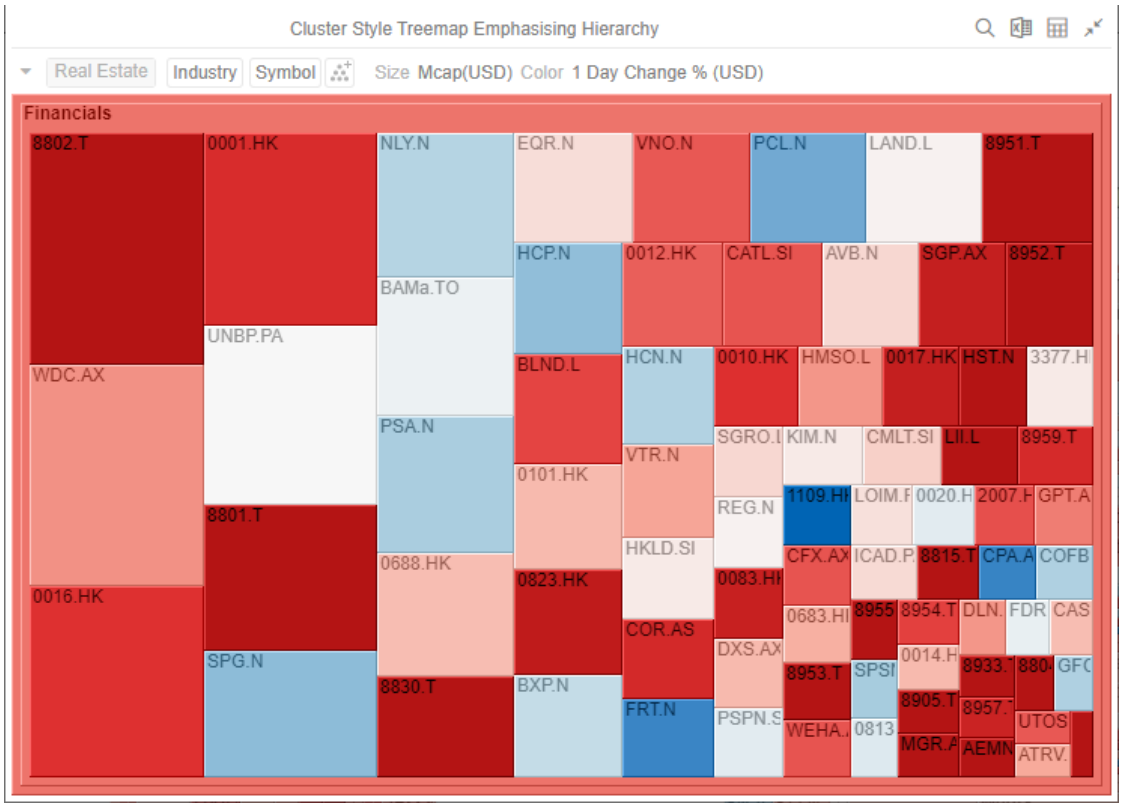
You can drill into cross tab columns, cross tab rows, and breakdown columns.

Steps:

Right-click on a column, select **Drill** and then the level you want to drill down into.



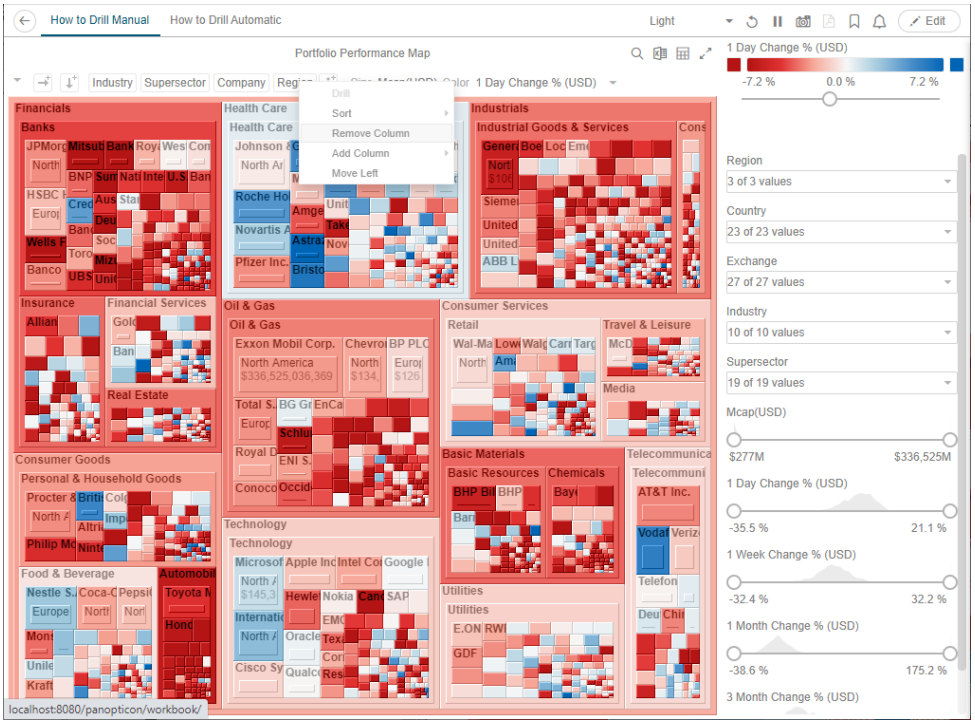
The selected level will appear gray.



Click the gray item to return to the default view that includes all categories in the data.

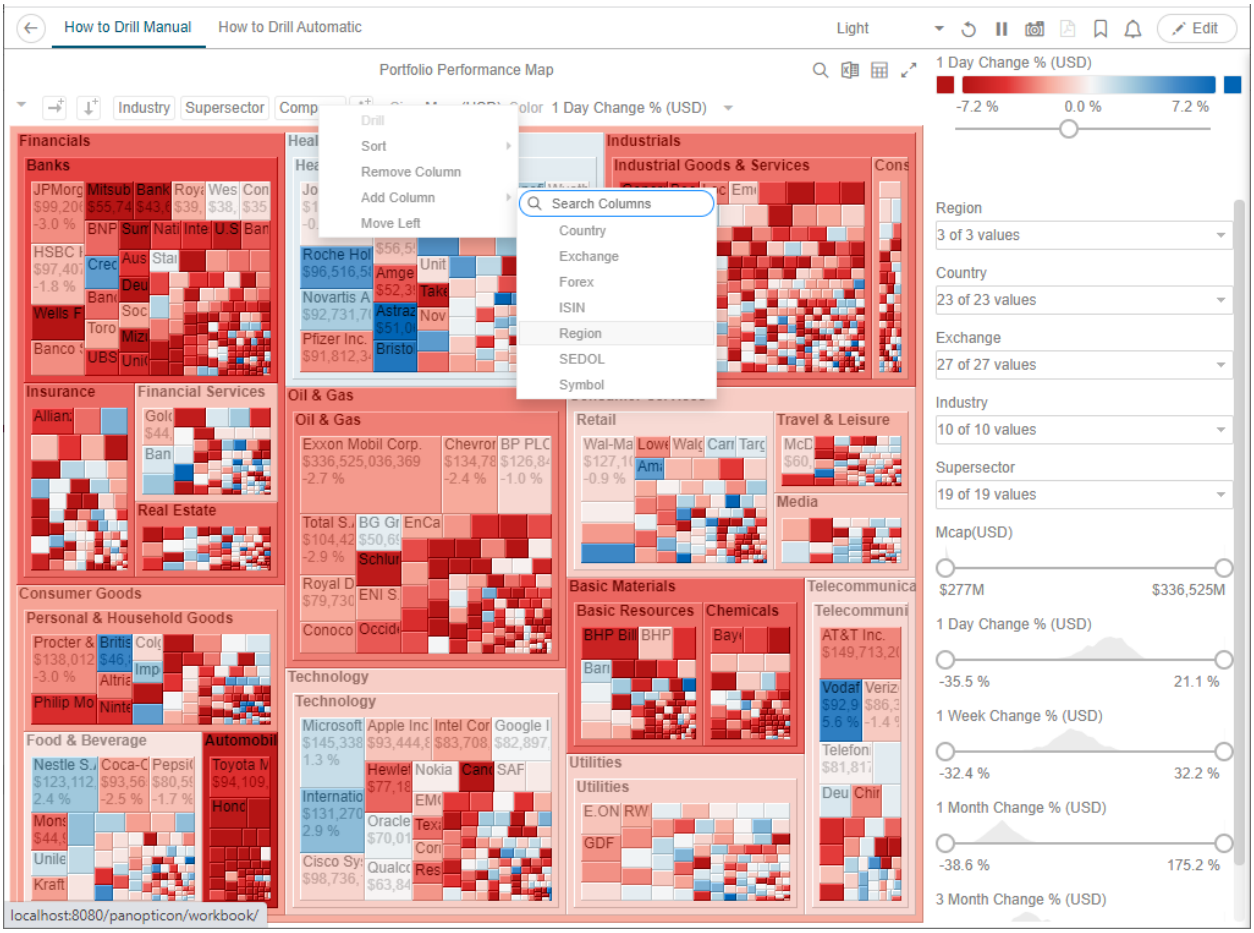
Removing Breakdown or Cross Tab Columns

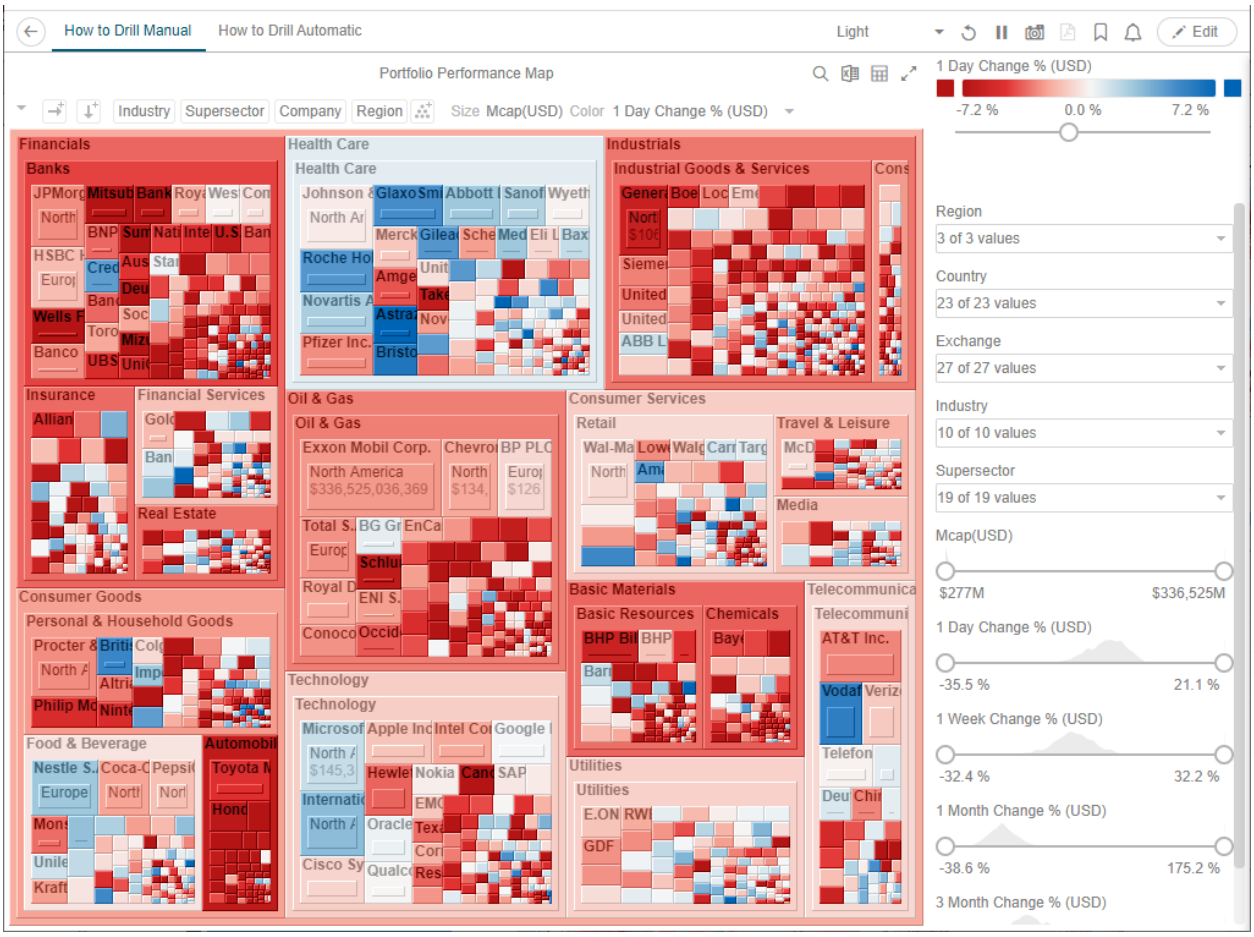
Right-click on a column and select **Remove Column** on the context menu.



Adding Breakdown or Cross Tab Columns

Right-click on a column, select **Add Column** on the context menu and then the column to add. You can filter the list by entering a column into *Search Columns*.





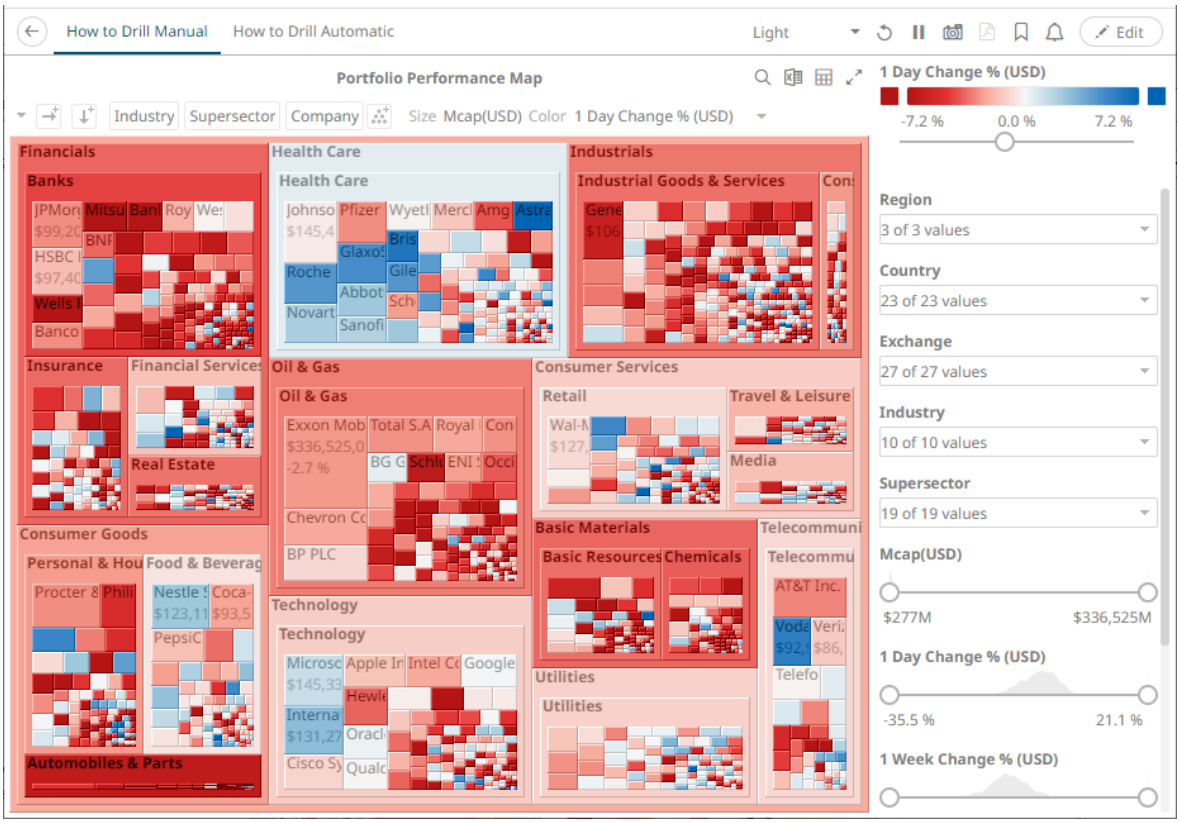
Moving Breakdown Columns

The **Move Right** or **Move Left** options are only available when there is more than one breakdown column.

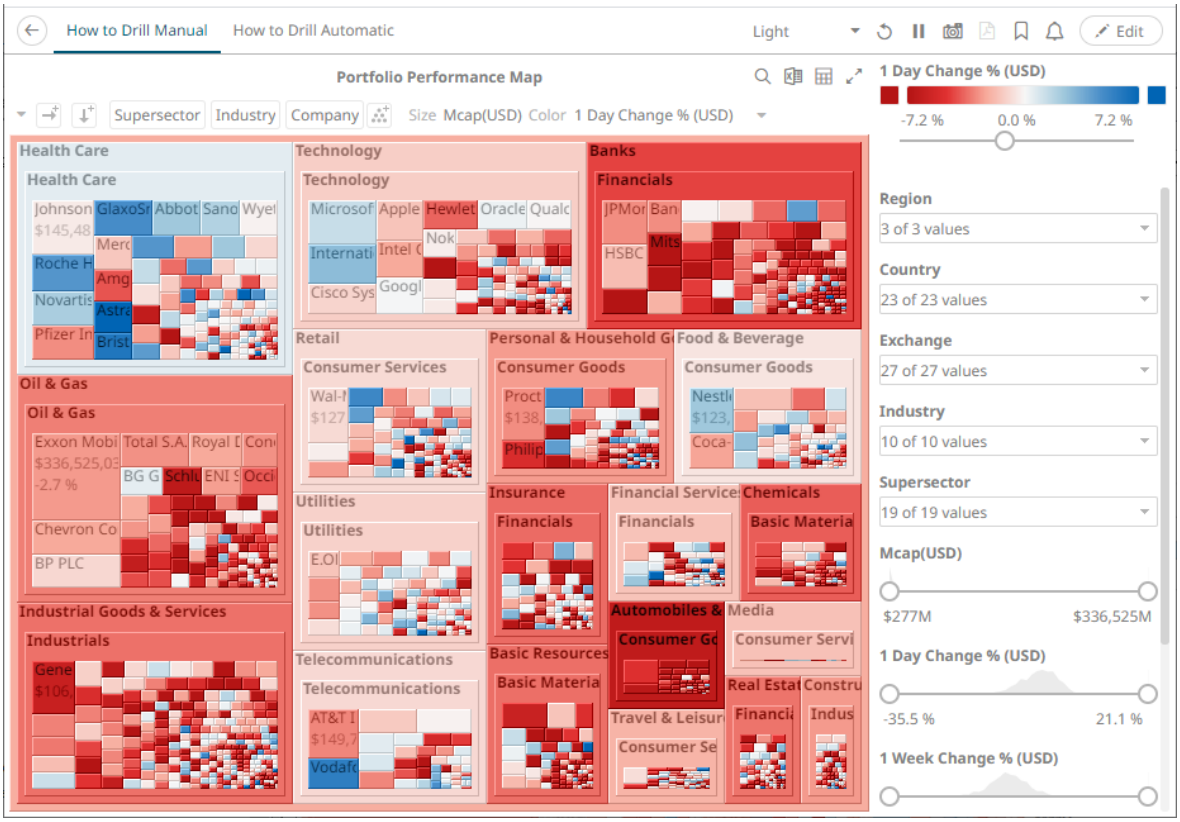
Right-click on a breakdown column and select **Move Right** or **Move Left** on the context menu.

You can also swap or move columns by selecting and dragging them to the preferred hierarchy level.

From: **Industry > Supersector > Company**



To: **Supersector > Industry > Company**



Toggling Between Rows and Columns of a Cross Tab

This feature supports the easy swapping between rows to columns, and vice versa in, the pivot points of a cross tab.

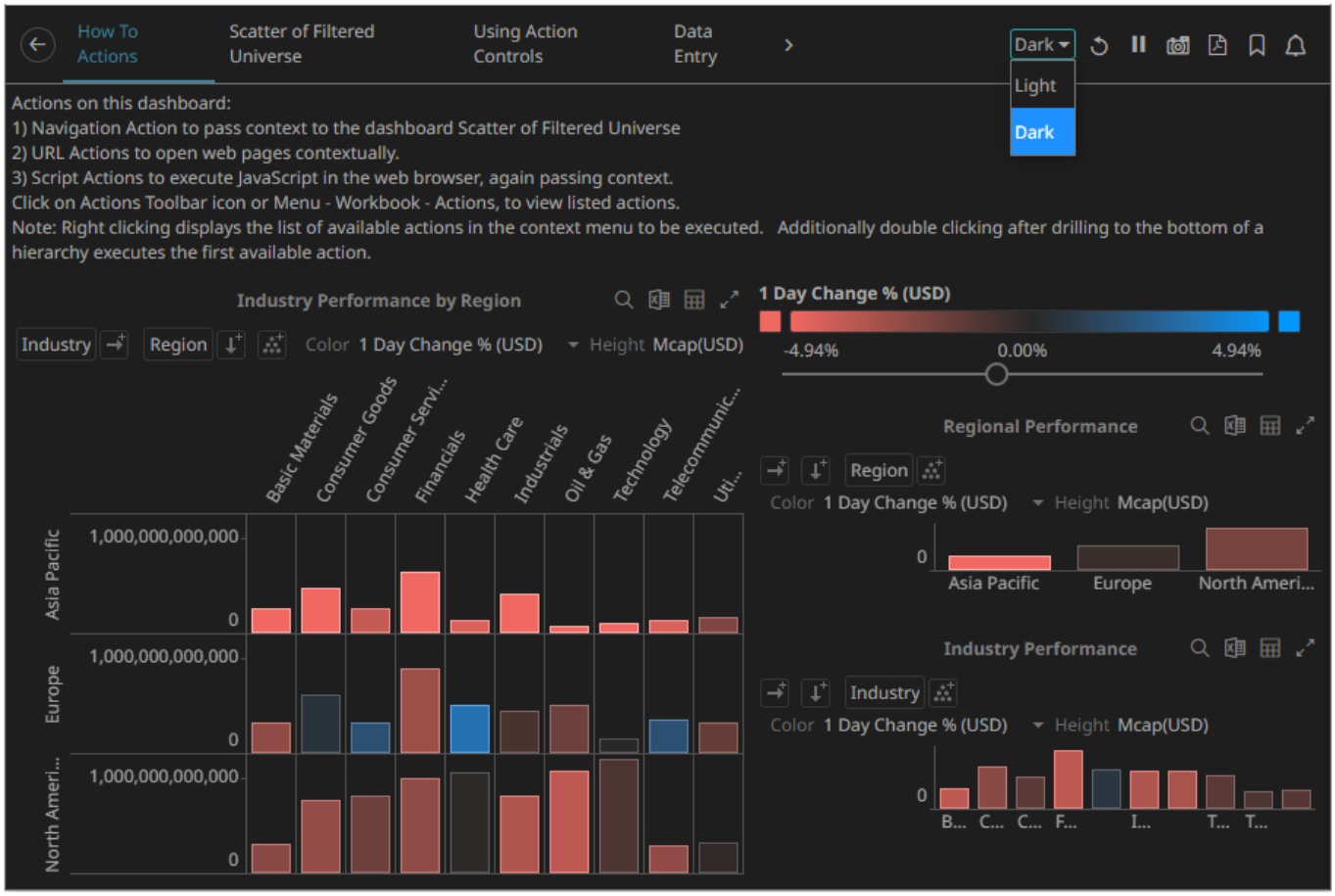
In a visualization that is cross tabbed, right-click on row or column and select **Swap Columns and Rows** on the context menu.

The rows and columns will be swapped in the *Columns* or *Rows* section of the visualization.

You can opt to revert to the original columns of the *Columns* and *Rows* by selecting the **Swap Columns and Rows** on the context menu.

Dynamic Switching of Workbook Theme

Users can dynamically switch between the two provided workbook themes: **Light** or **Dark**.



WORKBOOK TOOLBAR

An opened workbook has several toolbar options:

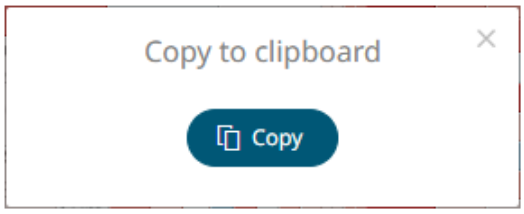
Toolbar Option	Description
Data Refresh	Manually refreshes the data.
Pause Real-Time	Clicking the icon changes it to and pauses the streaming data sources.
Copy Image	Exports the whole dashboard image to the clipboard.
Create PDF Report	Set the dashboards that will be included in the PDF report.
Bookmarks	Add and manage bookmarks.

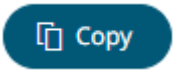
Alerts	Manage alerts and notifications.

Copying Dashboard Image

Steps:

1. Click the **Copy Image** icon on the toolbar.
   The **Copy to Clipboard button** displays.



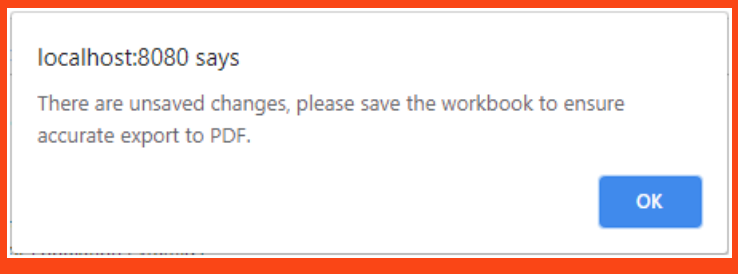
2. Click 

to copy and paste the whole dashboard image to another application.

Ad Hoc PDF Generation

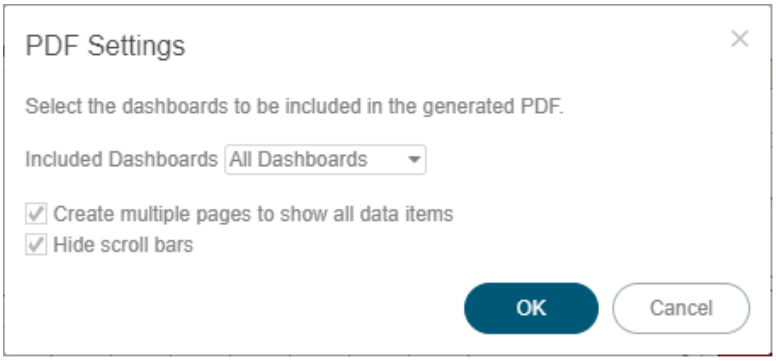
Select the dashboards to be included in the generated PDF.

NOTE **Before exporting to PDF, ensure the workbook is saved first.**



Steps:

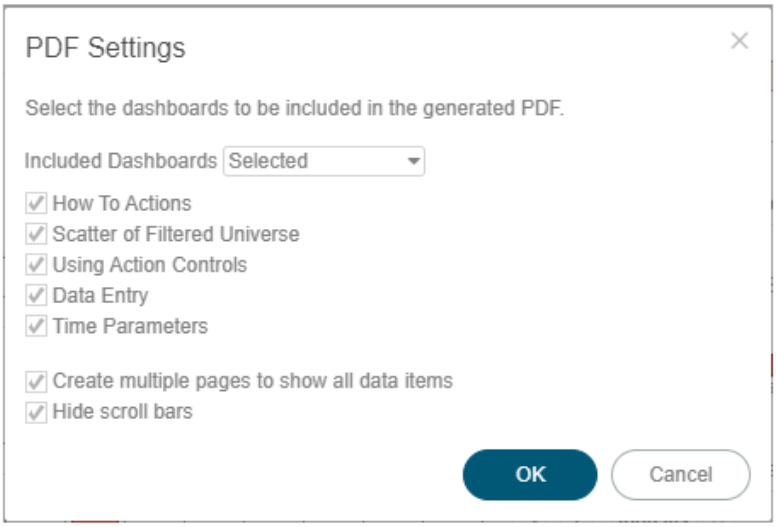
1. Click the **Bookmarks** icon on the toolbar.
   The *PDF Settings* dialog displays.



2. Select the dashboards to be included:

- All dashboards
- Current dashboard
- Selected

  The check boxes are enabled and all the dashboards are checked by default.



  Check only those that will be included in the generated PDF.

Some visualizations show a portion of the available content adding scroll bars. E.g., table, horizon graph, etc.

The final two options of the dialog relate to these visualizations.

3. To output all the content within a visualization that has scroll bars, for example, to output all the rows within a table, check the **Create multiple pages to show all data items** box.
4. To hide scroll bars from the output PDF pages, check the **Hide scroll bars** box.
5. Click

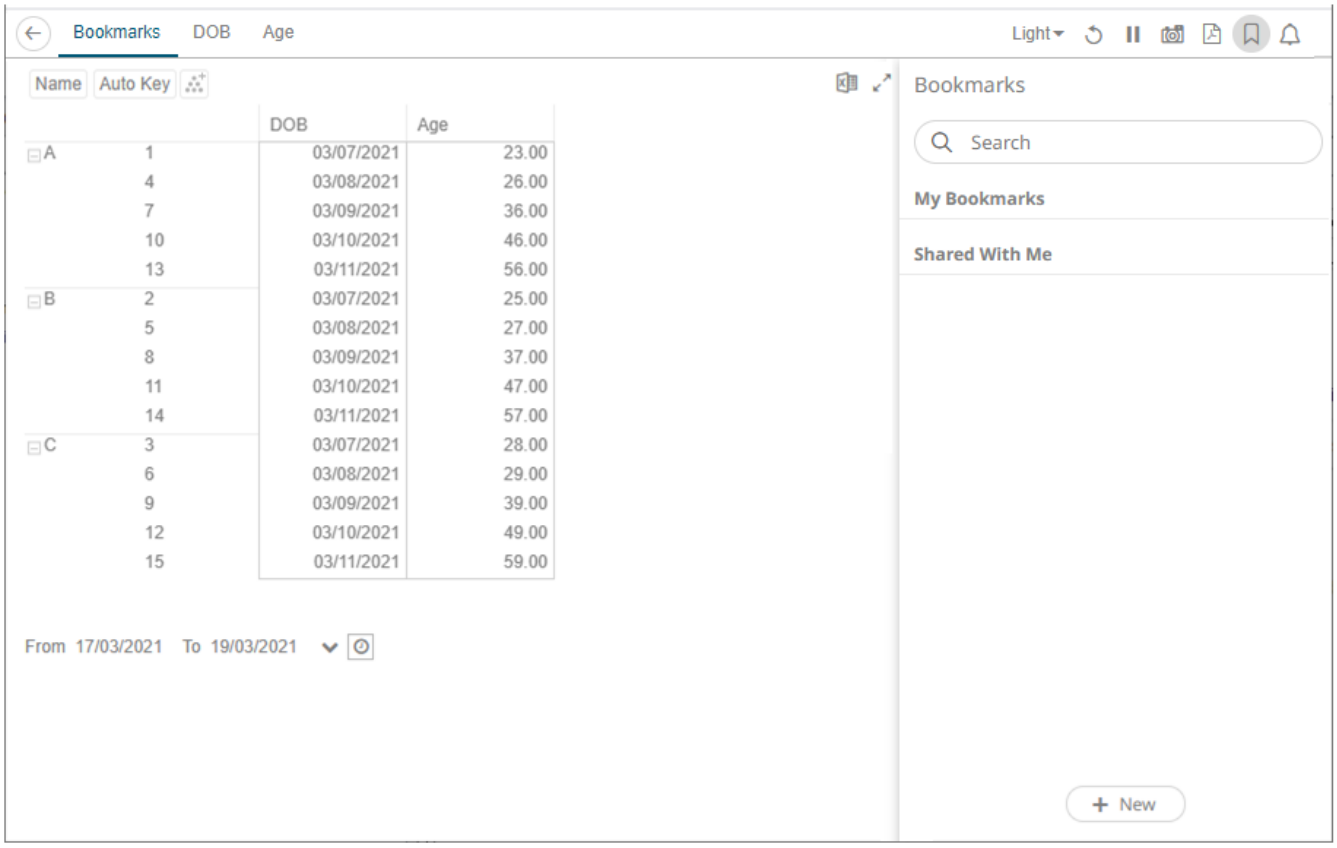
button to start the PDF generation.

This will allow the Panopticon Visualization Server to read all the datasets necessary to output the dashboard and produce the PDF file.

NOTE	Ad hoc PDF generation in the Web client using Google Chrome (or other browsers) may be hindered by the AdBlock Extension. To remove the AdBlock Extension in Google Chrome, perform these steps: 1. Click the Chrome Menu icon on the browser toolbar. 2. Highlight *Tools*, then click Extensions from the sub-menu. 3. Click Remove in the AdBlock Plus entry (e.g., uBlockOrigin). 4. Click Remove in the confirmation message that displays.

Bookmarking

Bookmarks are saved configurations of the active dashboard and workbook. A bookmark can be added, by authenticating, and clicking on the **Bookmarks** icon.



Bookmarks are not available with anonymous access workbooks.

Bookmarks do not save data, but do save the selected:

- Dashboard
- Parameters
- Filters
- Breakdowns, Hierarchies, Visible Depth, and Drill Level

- Variables (Size, Color, X, Y, etc.)

Consequently, although the underlying data may change, a specific view of that data can be specified and bookmarked for future usage.

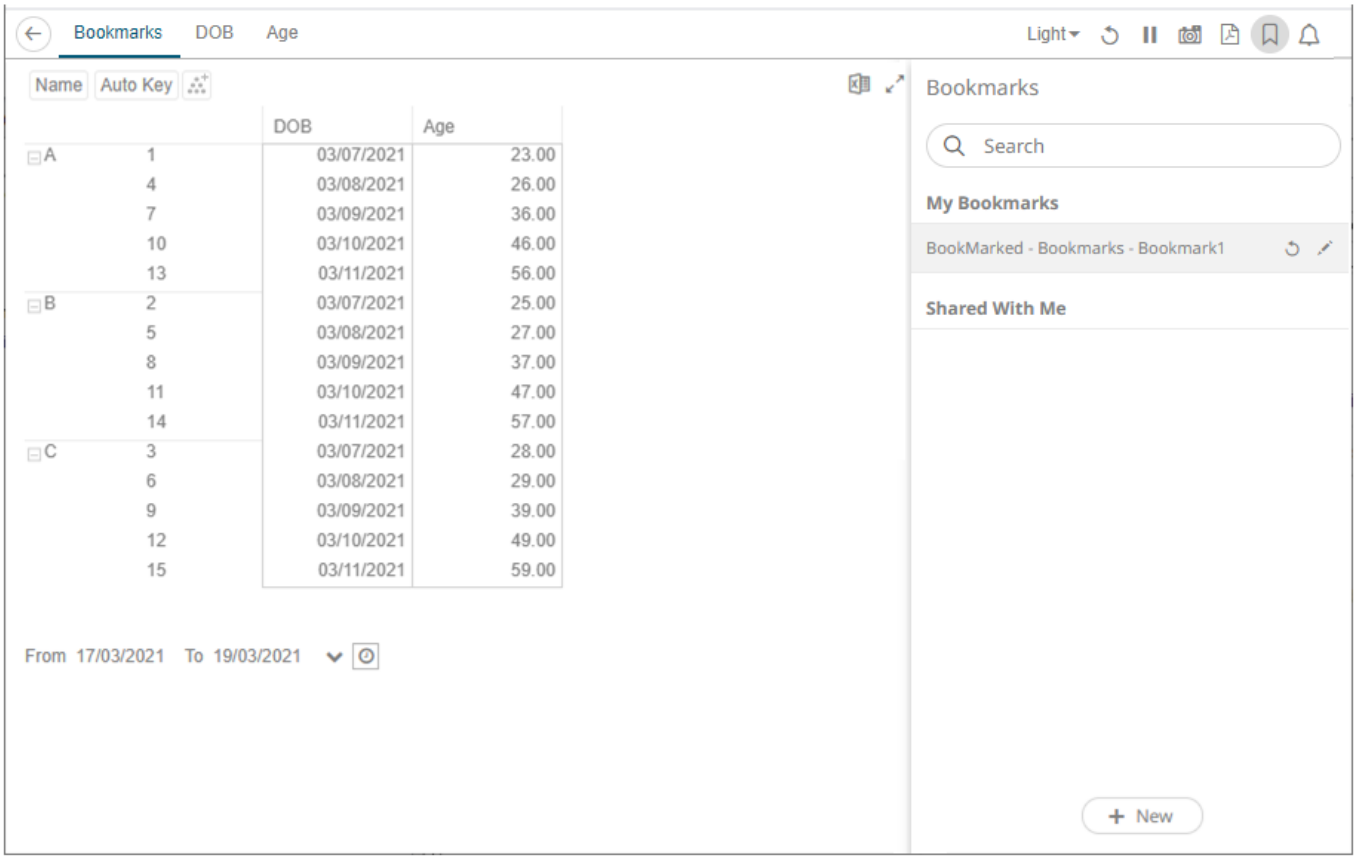
Bookmarks can be added and are available to all authenticated users of the workbook.

Bookmarks also generate a unique URL, which can be sent to another individual with access, allowing them to see exactly the same view of the selected dashboard.

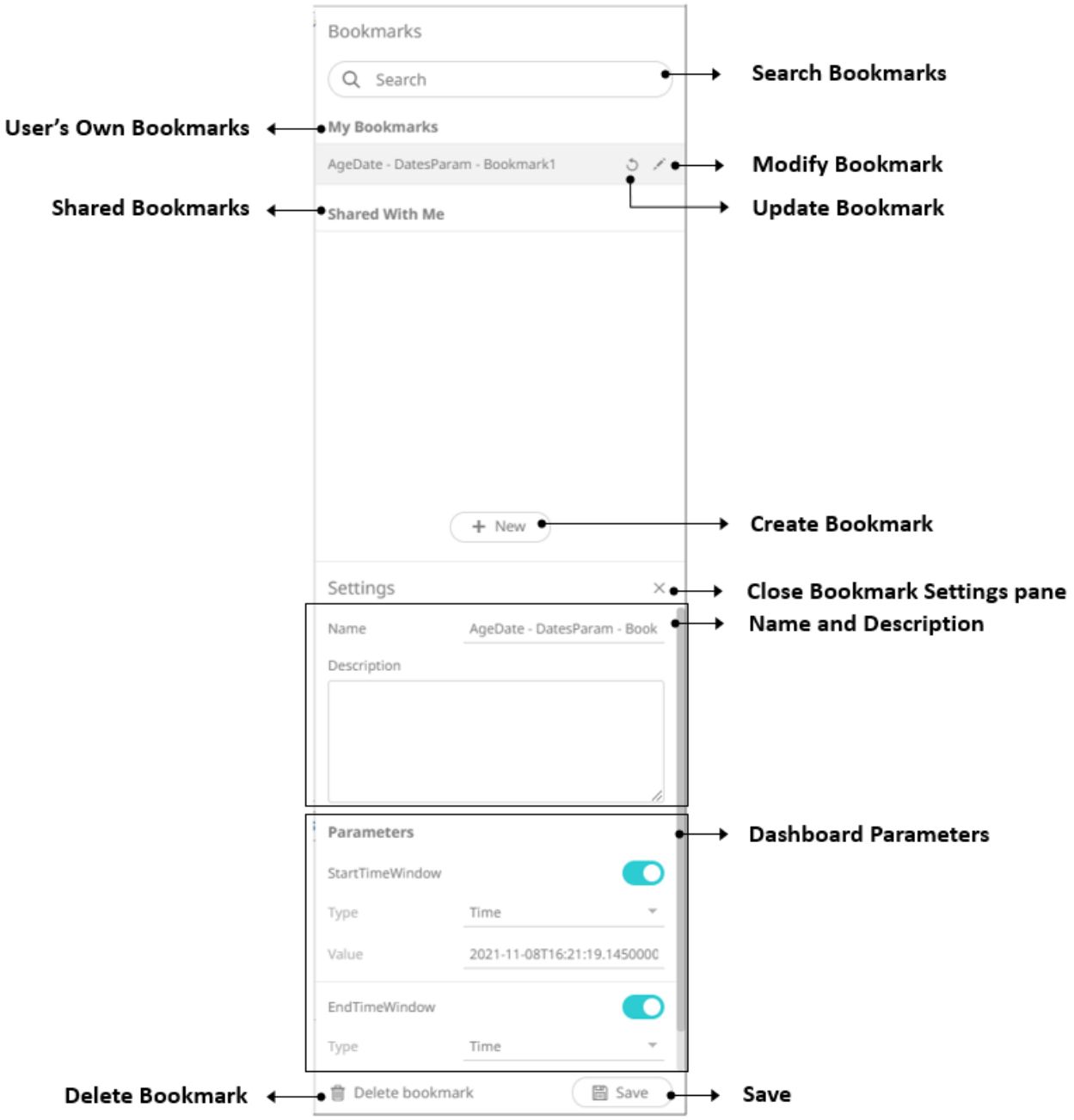
New bookmarks can be added by clicking the **New**

button.

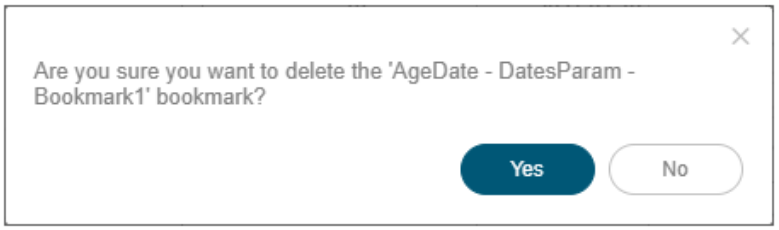
A new instance of the bookmark is added under the My Bookmarks section in the Bookmarks pane. The bookmark is initially named **<Workbook> - <Dashboard> - Bookmark<number>**.



Click **Modify** icon to define the settings of the bookmark. The *Bookmark Settings* pane is displayed.



Property	Description
My Bookmarks	User's own bookmarks.
Shared Bookmarks	Bookmarks shared to the user.
Delete Bookmark	Remove the bookmark.

	 Click **Yes** on the notification message to delete the bookmark.
Search Bookmark	To search for a particular bookmark, enter it in the *Search* box. You can also enter one or more characters into the *Search* box and the suggested list of bookmarks that matched the entries will be displayed.
Modify Bookmark	Display the *Bookmark Settings* pane for the modification of the bookmark settings.
Update Bookmark	Update the bookmark settings. Click **Yes** on the notification message to update.
Create Bookmark	Allows the creation of a new bookmark.
Close	Close the *Bookmark Settings* pane.
Name	Name of the bookmark.
Description	Description of the bookmark.
Dashboard Parameters	Available dashboard parameters. **NOTES:** • Excluding a parameter value sets its value in the bookmark to type Text and empty string value. This will allow the dashboard logic to dictate the parameter value that should be used when opening the bookmark. For example, if the dashboard contains an Action Date Picker that defaults to **now**, and that same parameter value is excluded from the bookmark, then the Action Date Picker default value will be the value when the bookmark is opened. • Directly modifying the parameter value in the bookmark (such as entering **now**, **today**, or **yesterday**) is not supported.
Save	Enabled when a change is made in the bookmark settings. Click to save.

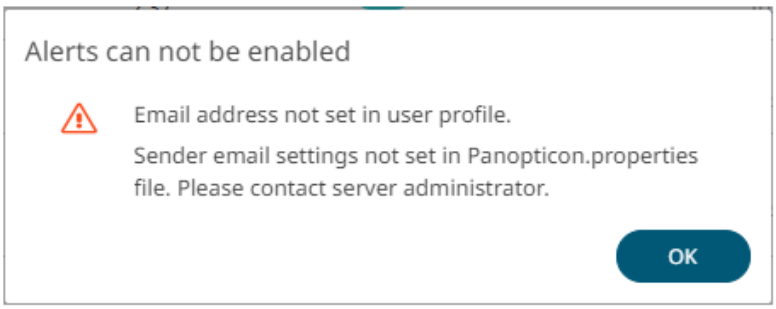
[2] ALERTING

The Alerts function allows to notify you when the data in a visualization has met your predefined settings.

If alerts are required to be sent via email, the following properties must be configured first in the `Panopticon.properties` file.

Property	Alert
Attribute	`alert.creation.only.by.administrators`
Description	Enable or disable whether only Administrators can create alerts.
Default Value	**false**
Property	Alert
Attribute	`email.address`
Description	The email address where the alert will be sent from.
Default Value	
Property	Alert
Attribute	`email.password`
Description	The email password, if available.
Default Value	
Property	Email
Attribute	`email.host`
Description	The host name used by the email server.
Default Value	
Property	Email
Attribute	`email.port`
Description	The port number used by the email server.
Default Value	

Otherwise, when trying to enable an alert, this error will be displayed:



Save the updated file and restart Tomcat.

Setting Up Alerts on the Web Client

Alerts can be defined against:

- Streaming data sources (including CEP Engines and message queues)
- Periodically refreshed data sources (like Oracle, SAP Sybase, SQL Server, and so on)

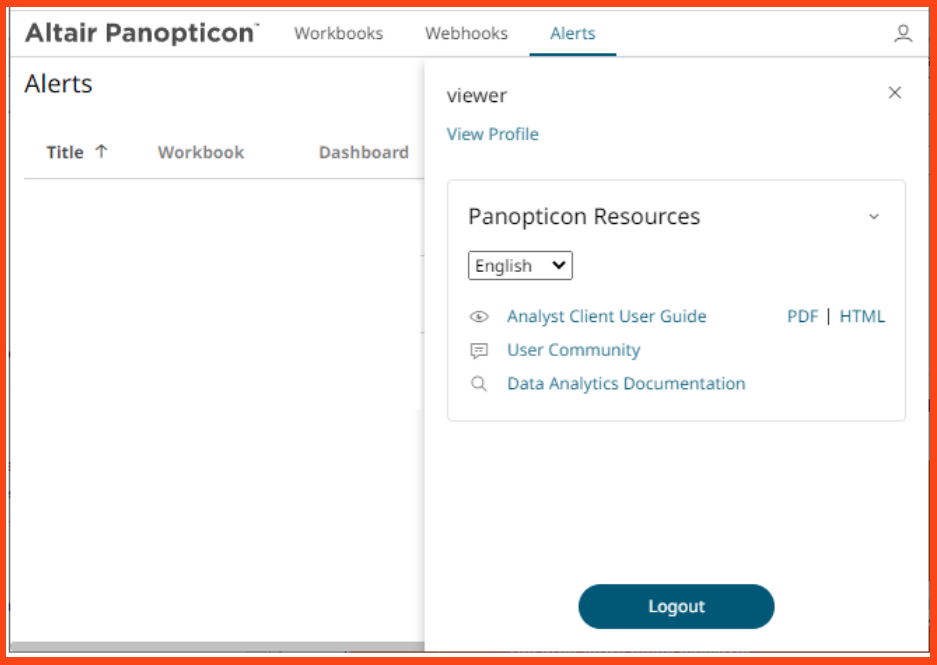
Alert definition can be done by right-clicking on a streaming numeric data in a visualization in the Web client and setting the limits, duration, what will be included, how many and when an email will be sent.

NOTE **Before setting up the visualization alert, enter the email of the user or group who will receive the alert on the *User Profile*:**

Steps:

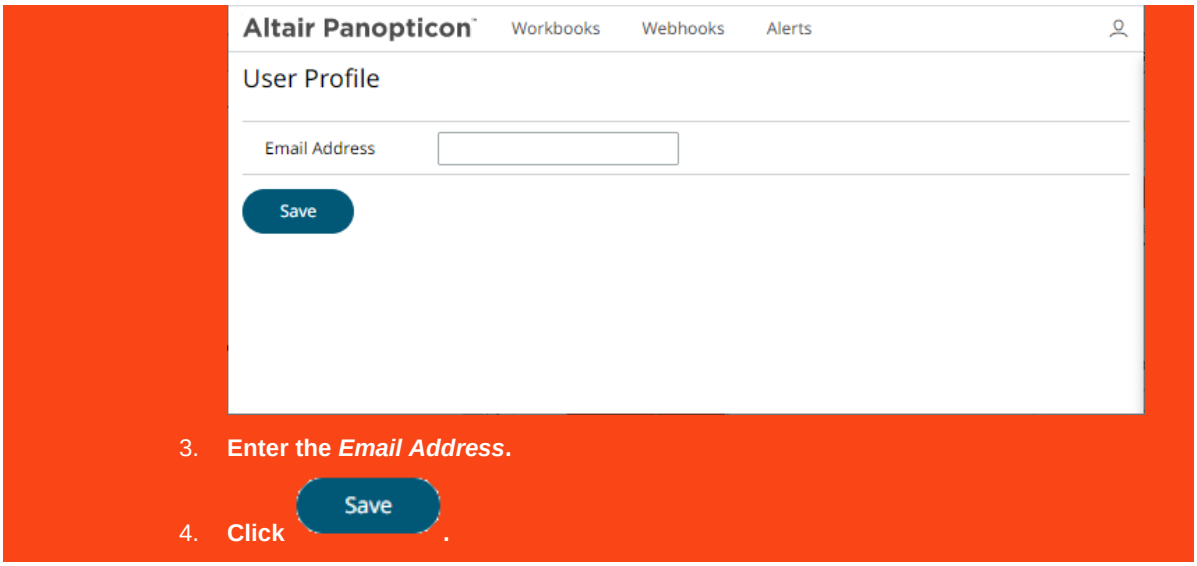
1. **On the toolbar, click .**

The drop-down menu displays.



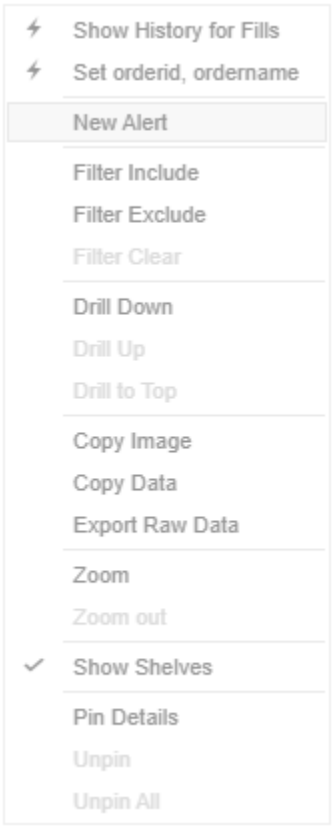
2. **Click *View Profile*.**

   The *User Profile* page displays.

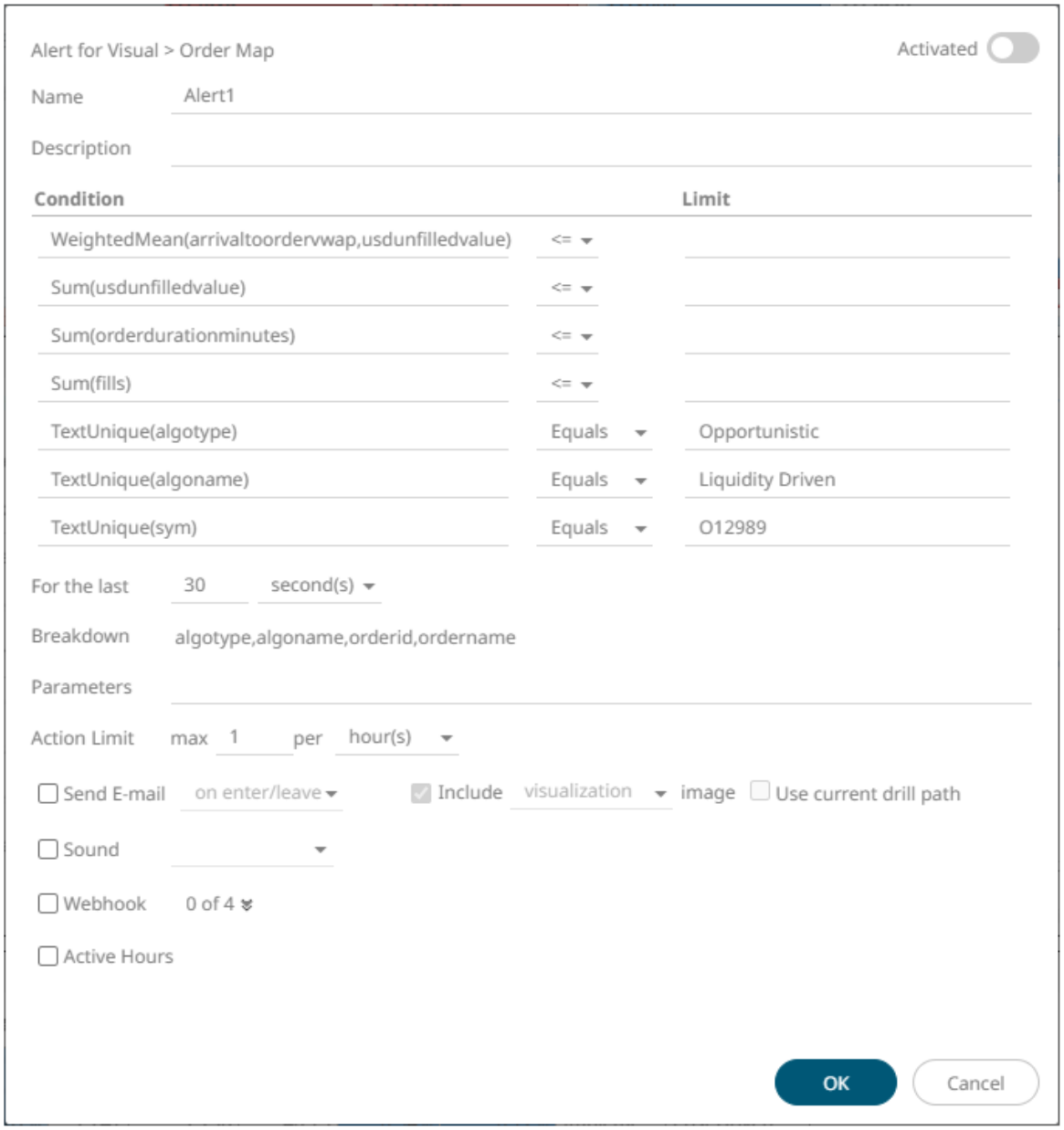


Steps:

1. Open a workbook on the Web client and right-click on a streaming numeric data in a visualization. Select *New Alert* on the context menu.

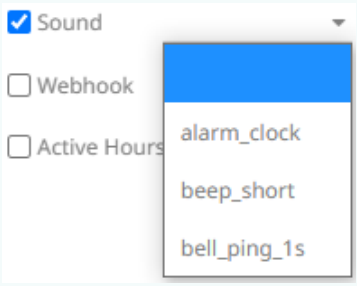


The *Alerts* dialog displays with the name of the visualization where the alert will be set.

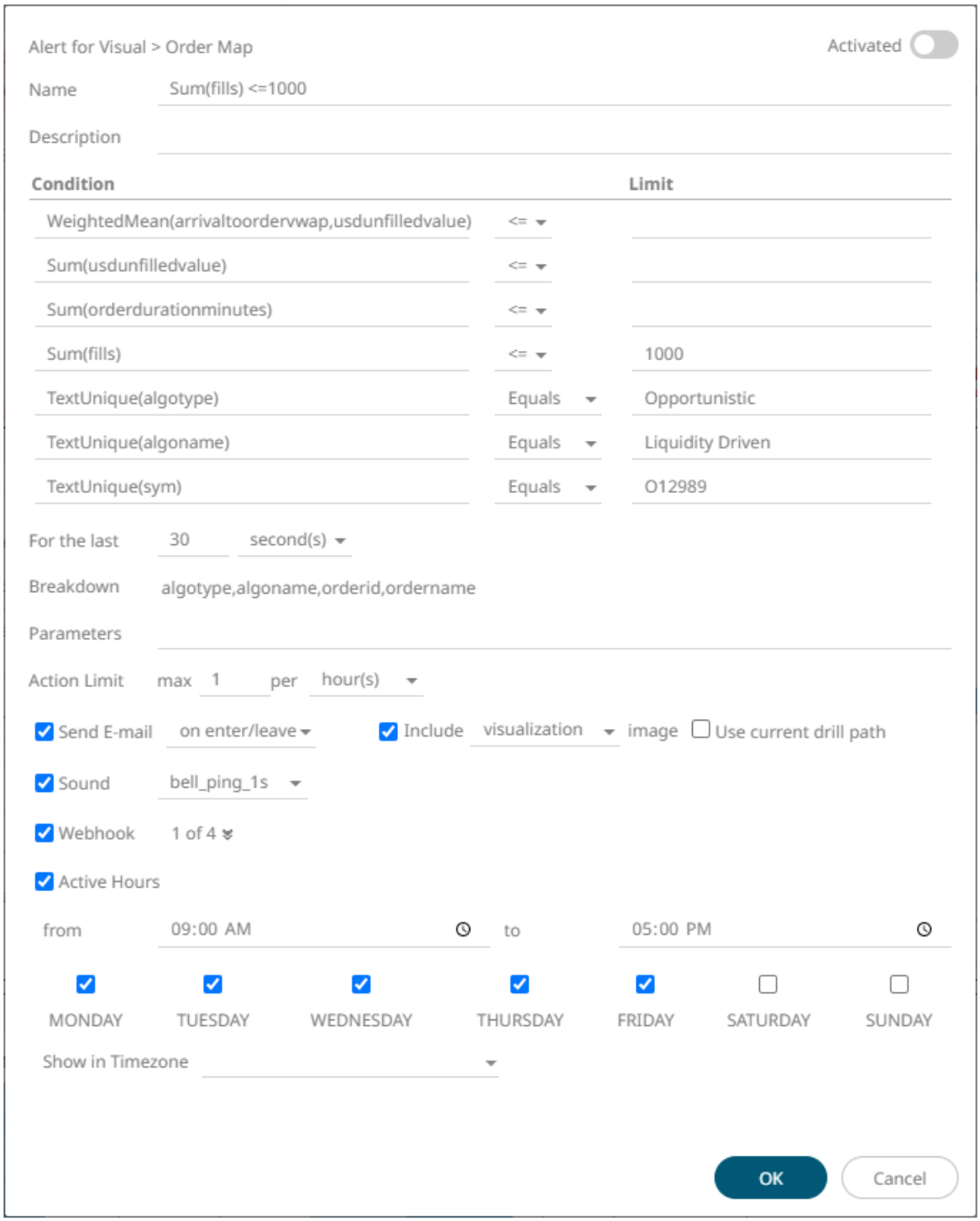


2. Enter or select the following properties:

Setting	Description
Name	Name of the alert.
Description	Description of the alert.
Condition	Allows setting the Upper (<= or Lower (>=) *Limit* of all the available numeric variables in the visualization. For text variables, there are three types of conditions: • Equals - The string is equal to another string, e.g., Country=Sweden • Wildcard: The string matches a wildcard expression, e.g., Country=Norwa* would match Country=Norway

	• Regex: The string matches a regex expression, e.g., Country=I[a-zA-Z]+a would match Country=India and Country=Indonesia
For the Last	Checks if a value has reached the limit on the set Date/Time unit: • second(s) • minute(s) • hour(s) • day(s)
Breakdown	Current breakdown of the visualization.
Parameters	Available parameters in the visualization.
Action Limit	The maximum number of times an alert will be sent on the set Date/Time unit: • second(s) • minute(s) • hour(s) • day(s)
Send E-mail	Determines when an alert email will be sent: • on enter • on leave • on enter/leave If unchecked, the notification will only be displayed on the Web client.
Include	Determines whether the image of the visualization or dashboard will be included in the alert email. For the included image of the visualization, check the **Use current drill path** box to generate a drilled image in the email.
Sound	The sound that will be played for a triggered alert. The available sounds are mp3 files placed in the `AppData/Sounds` folder (i.e., `C:\vizserverdata\Sounds`). Panopticon is shipped with one sound (i.e., bell_ping_1s.mps).  Default is **None**.
Webhook	Webhooks that will executed when the alert is triggered.
Active Hours	Determines when an alert should be active. Proceed to step 3.

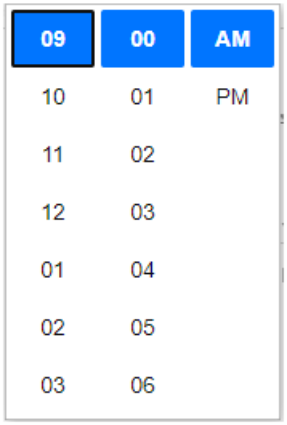
3. Check the *Active Hours* box. The dialog changes to display:



By default, the duration is from **9:00 AM** to **5:00 AM** on **Monday**, **Tuesday**, **Wednesday**, **Thursday**, and **Friday**.

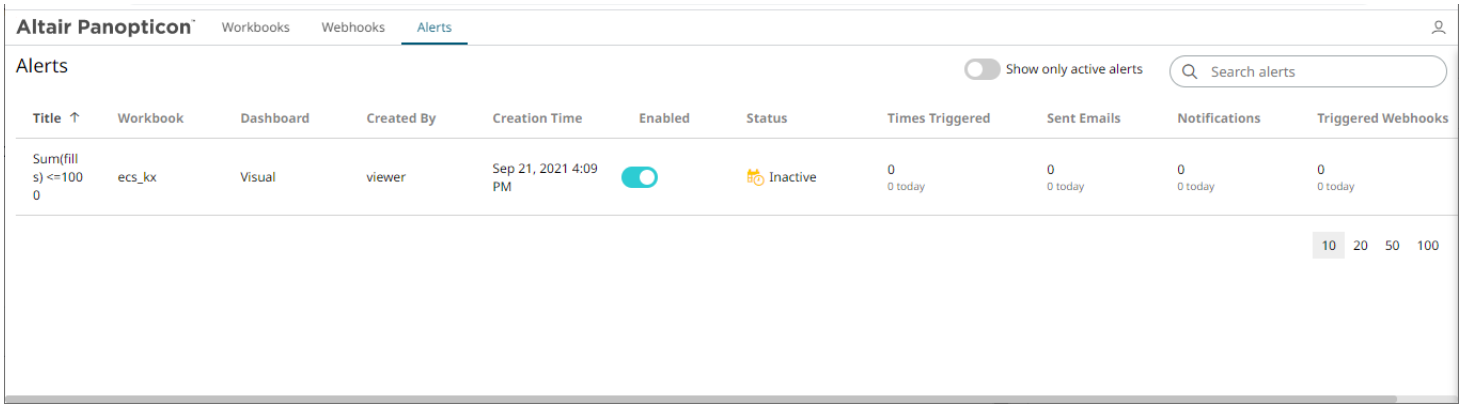
4. To modify the *Active Hours*, click .

   The *Clock* settings display.



5. Select the *Hour*, *Minutes*, and *AM/PM* settings.
6. To modify the *Active Days*, check the boxes of the desired days.
7. To apply the active hours in another time zone, select the desired value from the *Show in Timezone* drop-down list box.

   Once set, the *From* and *To* limits will be applied for that time zone. If not set, the server default time zone will be used.
8. Tap the **Activated** slider to turn it on.
9. Click OK. The new alert is added on the *Alerts* page.



NOTE **When creating alerts for grand total, ensure that no breakdown is set.**

You can then opt to perform any of the following operations:

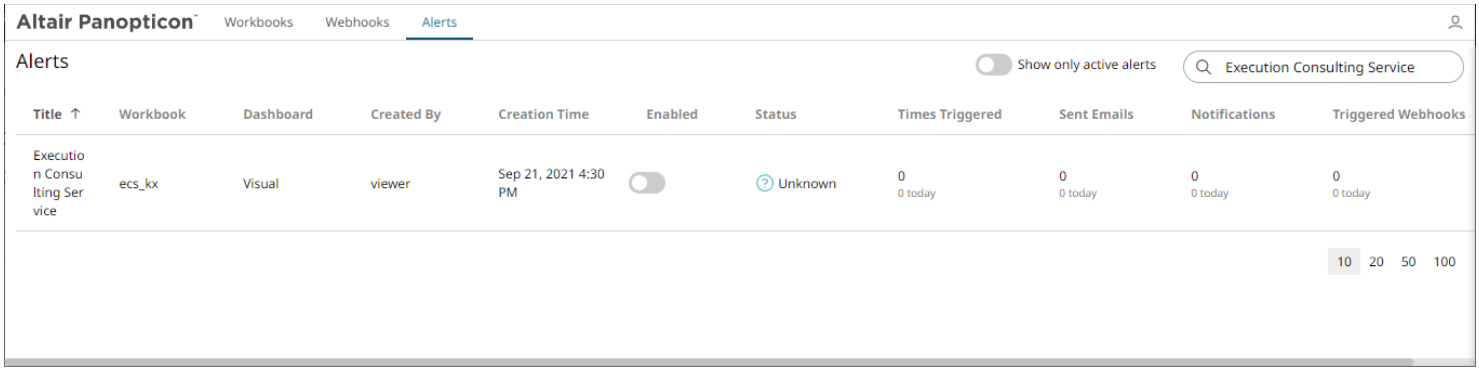
- Sort alerts
- Search for alerts
- Enable an alert
- Modify alerts
- Delete Alerts

Sorting Alerts

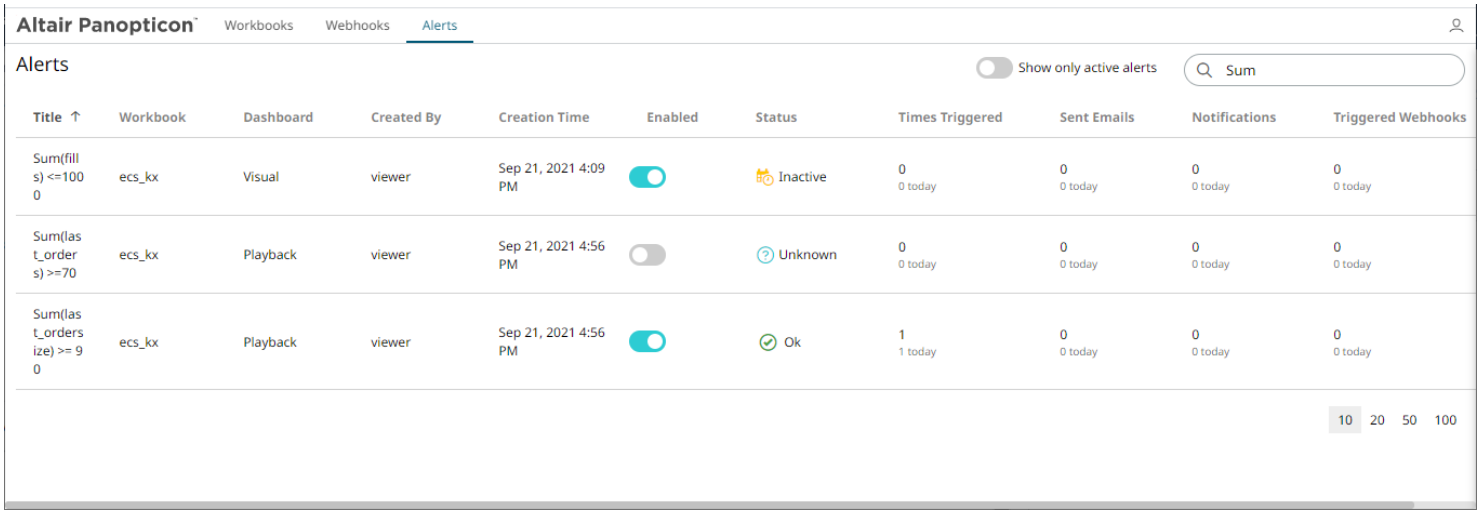
By default, the list of alerts is sorted by *Title* in an ascending order. You can modify the sorting of the list by clicking the or button of the *Title, Workbook, Dashboard, Created By, Creation Time, Enabled, Status, Triggered, or Triggered Today* columns. The icon beside the column that was used for the sorting will indicate if it was in an ascending or descending order.

Searching for Alerts

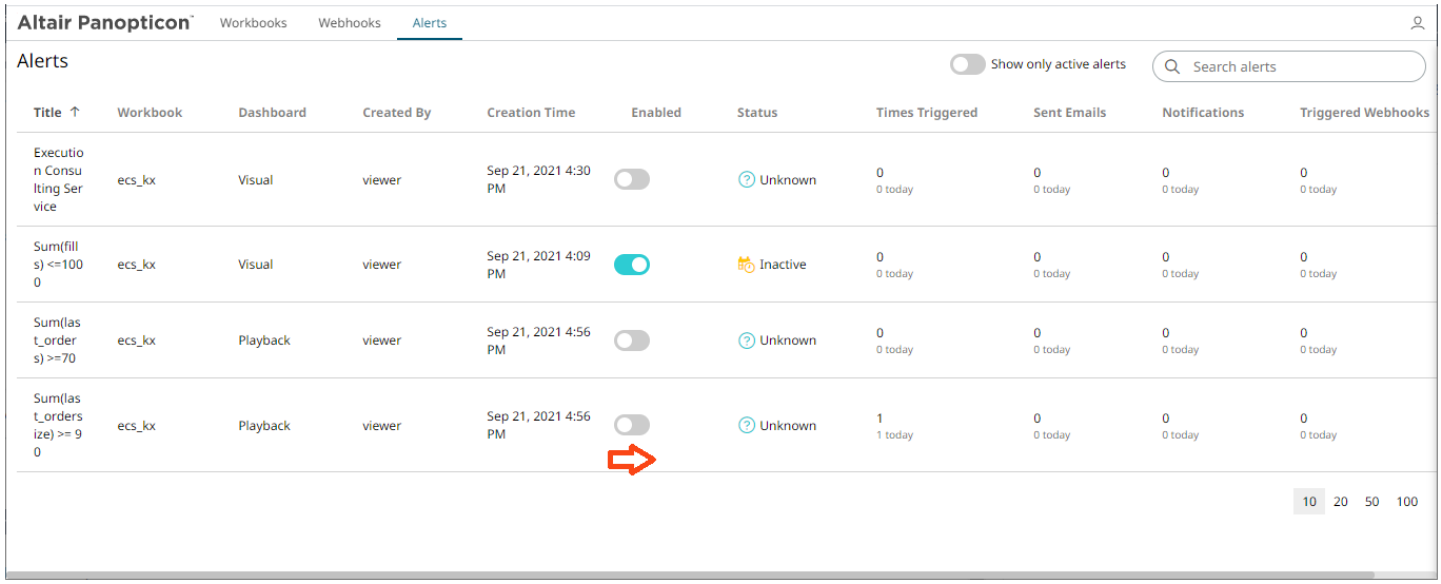
To search for a particular alert, enter it in the *Search* box.



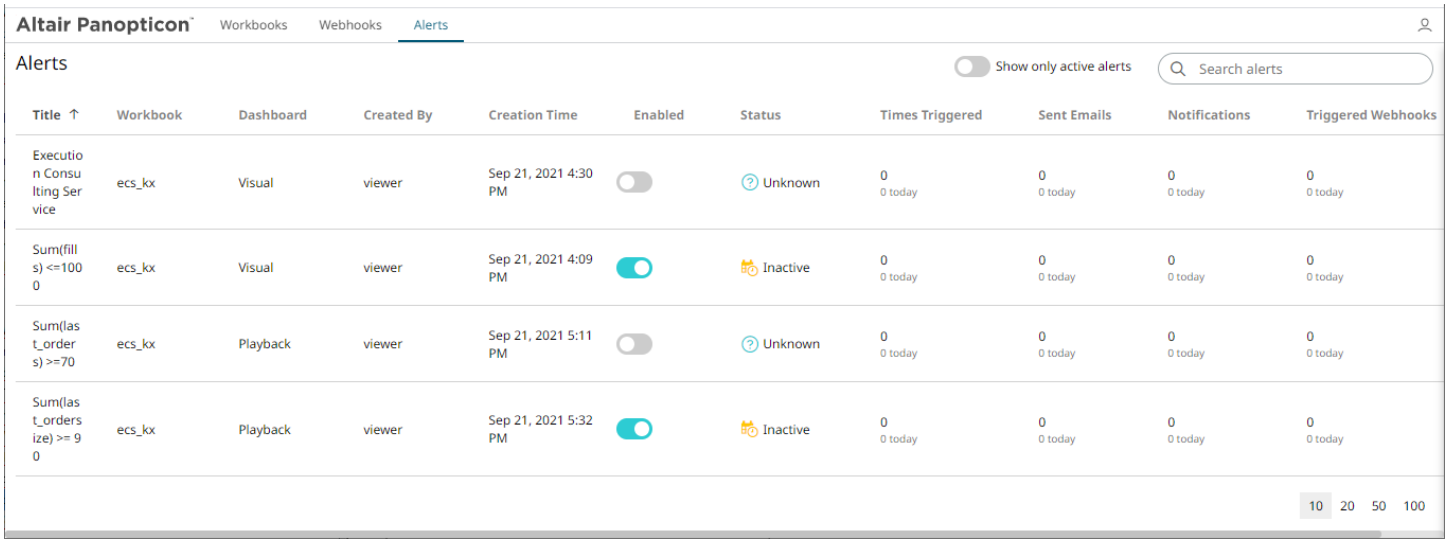
You can also enter one of more characters into the *Filter Applications* box and the suggested list of alerts that matched the entries will be displayed.



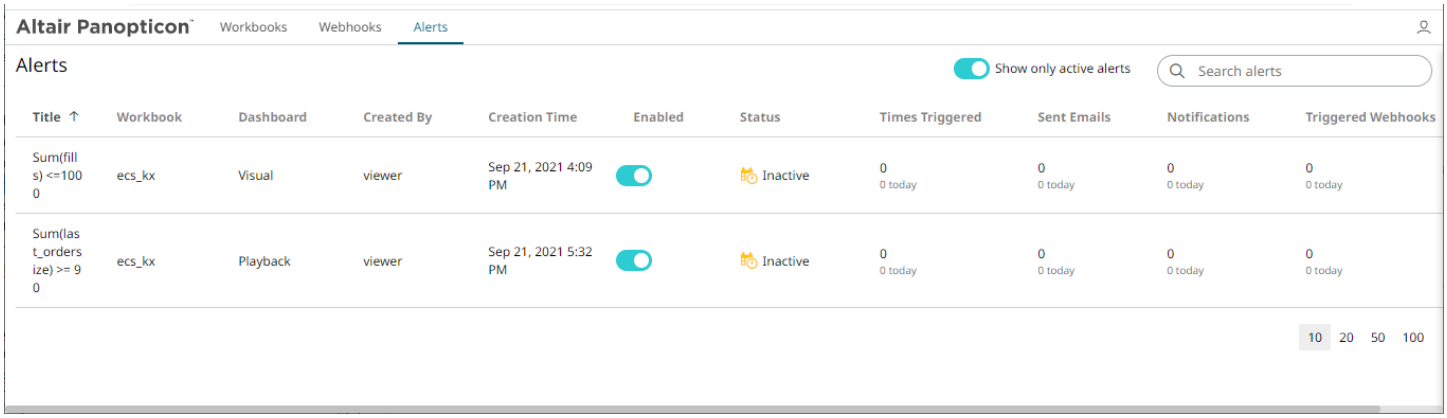
Enabling Alerts on the Alerts Page



Tap the **Enabled** slider to turn it on.



You can opt to tap the **Show only active alerts** slider to display the active alerts.



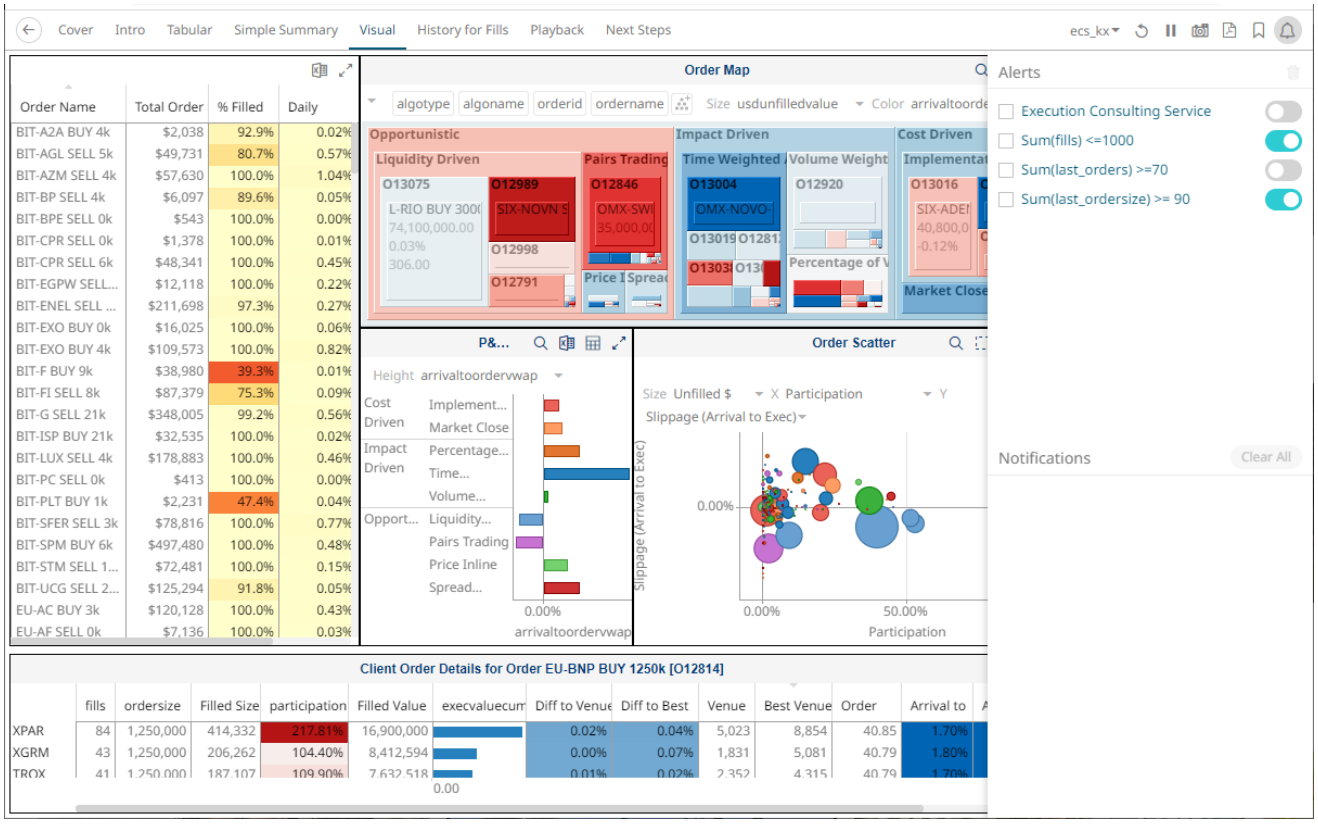
Enabling alerts can also be performed on a visualization's *Alerts* pane.

Modifying Alert Settings

Steps:

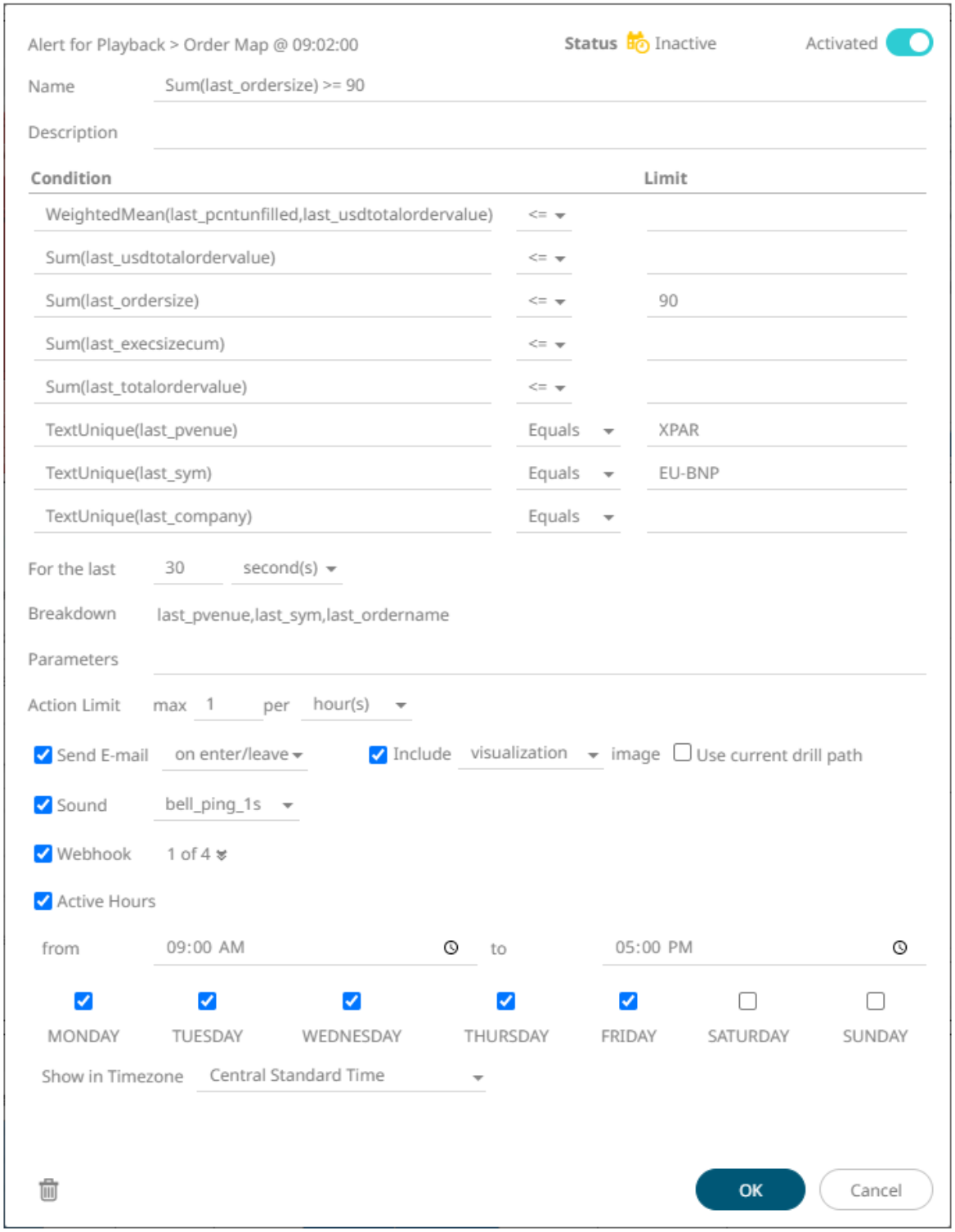
1. Open a workbook with an alert and click on the **Alerts** icon.

   The *Alerts* panel displays with the list of alerts.



2. Click an alert to modify.

   The *Alerts* dialog displays with the status (e.g., **Inactive**).



3. Make the necessary changes then click **OK** to save them.

Deleting Alerts

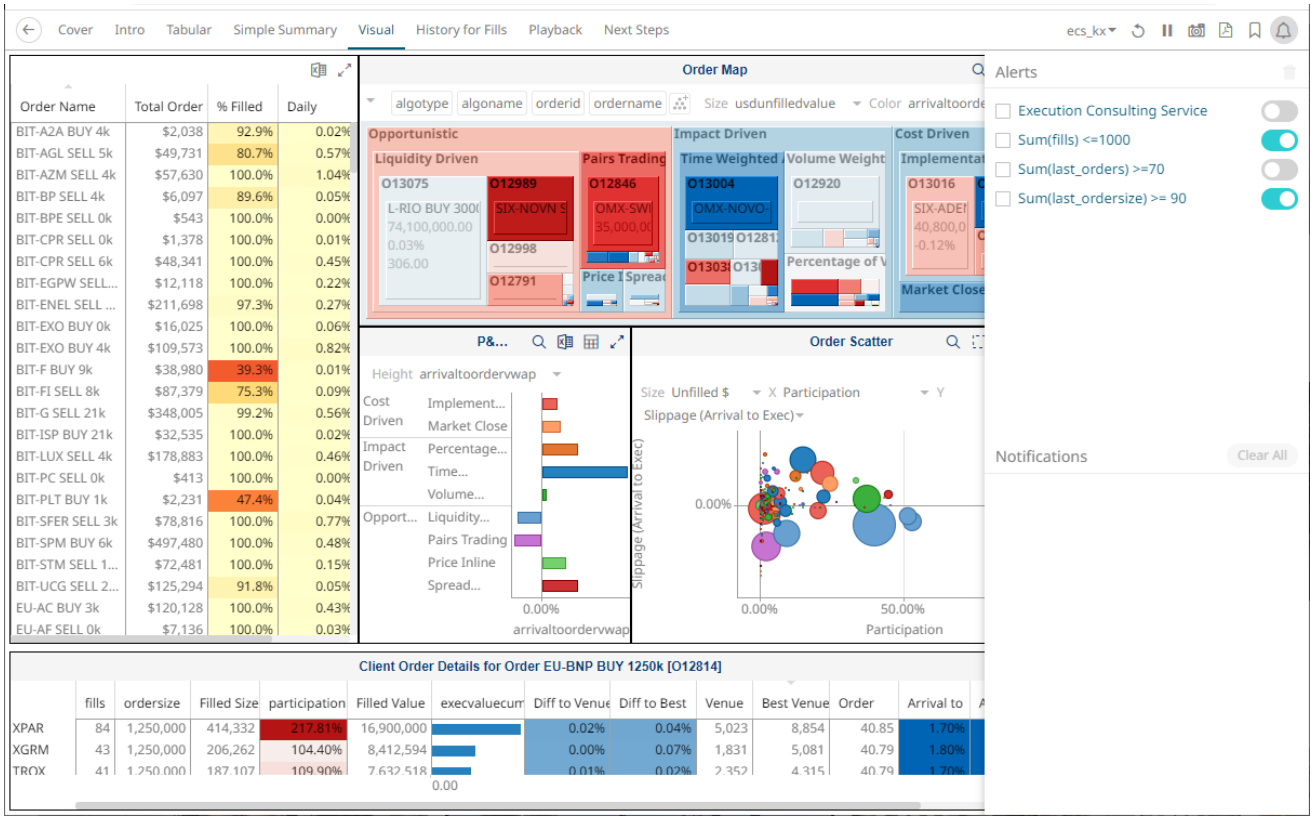
Alerts can be deleted on:

- the Alerts panel
- an Alerts dialog
- the Alerts tab

Deleting Alerts on the Alerts Panel:

1. Open a workbook with an alert and click on the **Alerts** icon.

   The *Alerts* panel displays with the list of alerts.

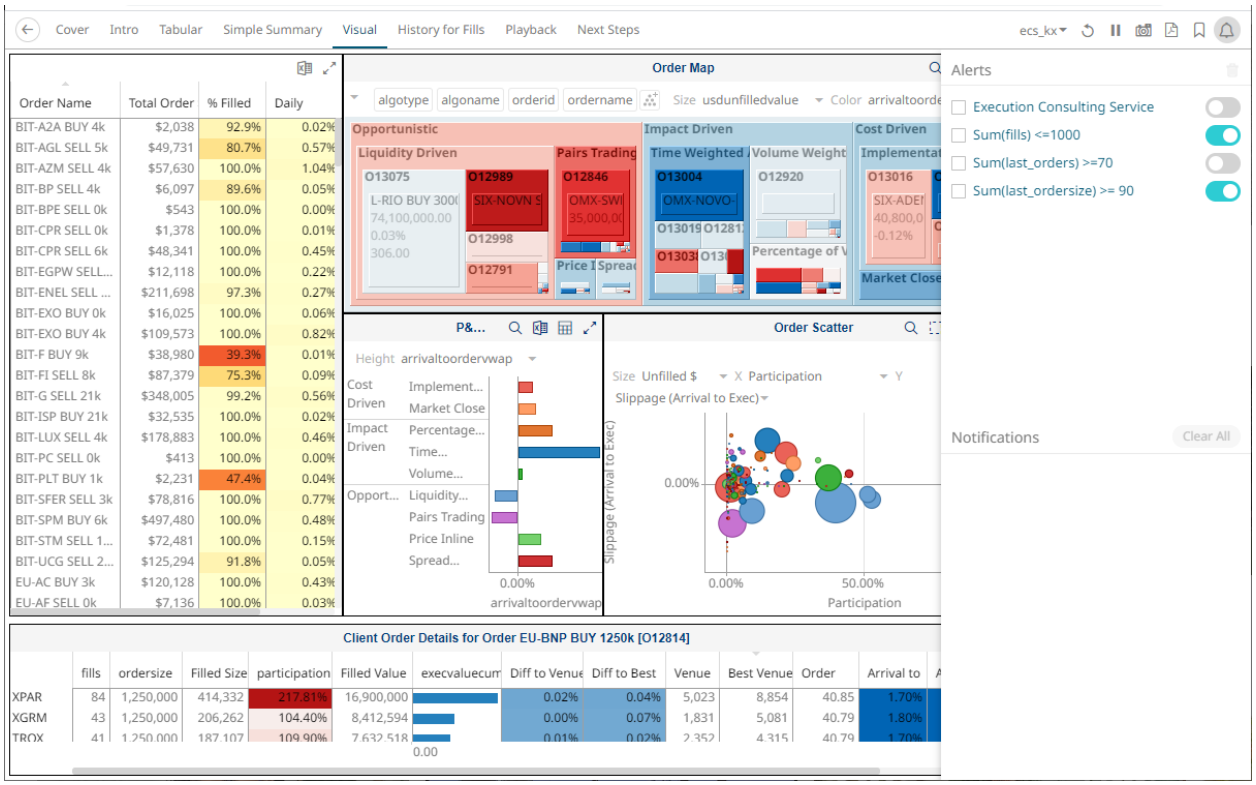


2. Check the box of an alert and click the **Delete** icon. You can also check several boxes to delete multiple alerts.

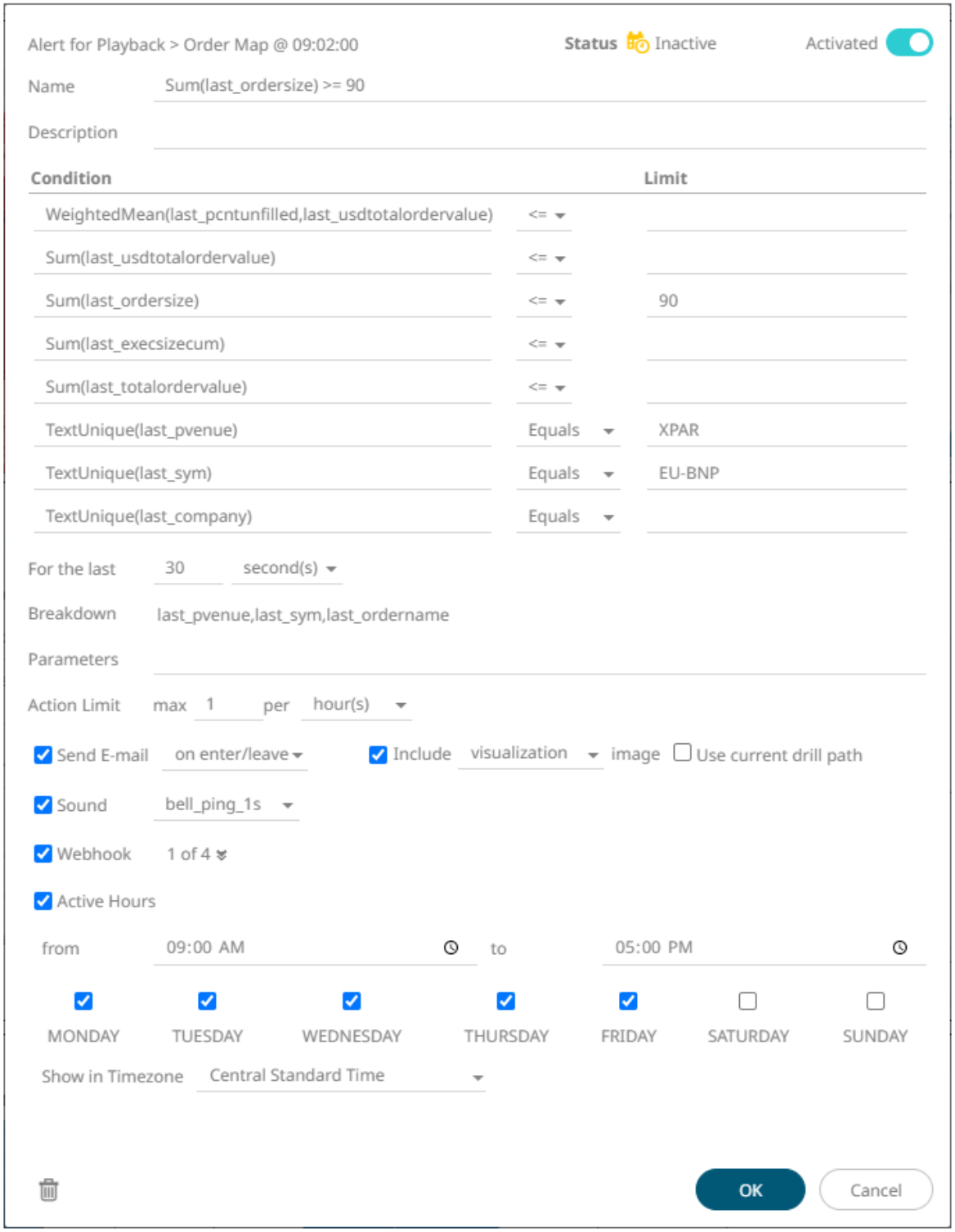
Deleting Alerts on an Alerts Dialog:

1. Open a workbook with an alert and click on the **Alerts** icon.

   The *Alerts* panel displays with the list of alerts.



2. Click an alert. The *Alerts* dialog displays.

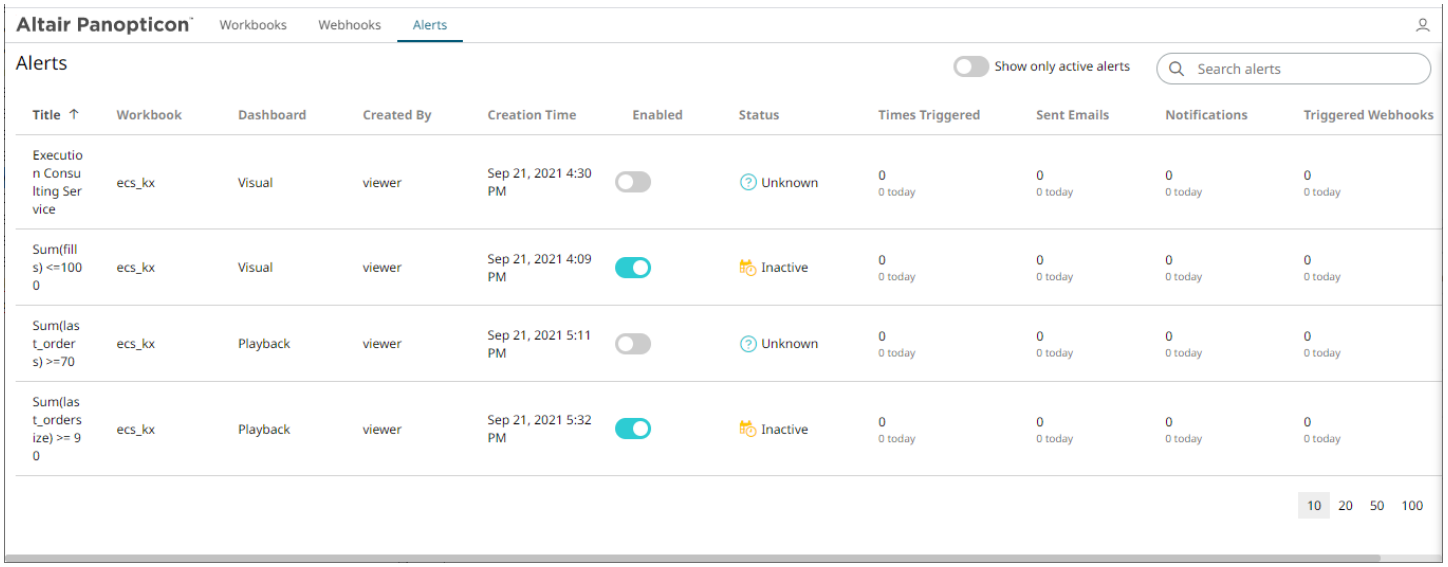


3. Click the **Delete** icon.

Deleting Alerts on the Alerts tab:

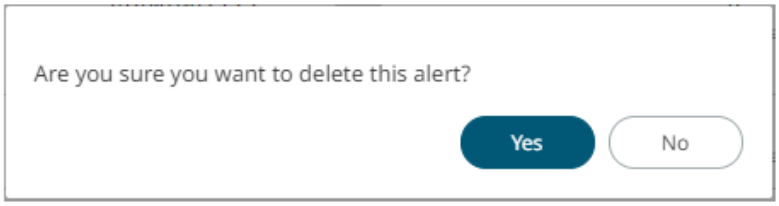
1. Go to the **Alerts** tab.

The **Alerts** tab displays the list of alerts.



2. Click the of an alert to delete.

   A confirmation message displays.



3. Click **Yes**.

Enabling Alerts

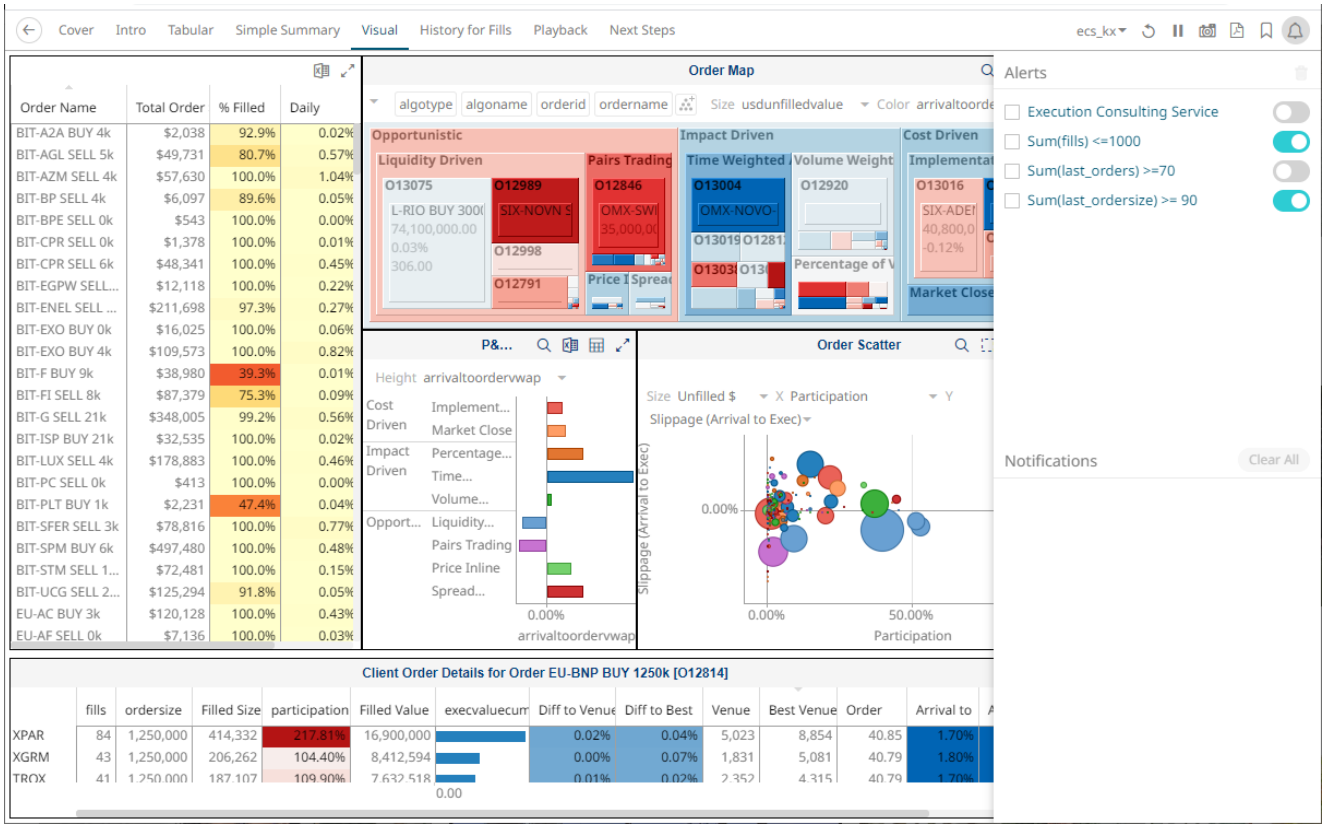
Alerts can be enabled either on:

- the Alerts panel
- an Alerts dialog

Enabling Alerts on the Alerts Panel:

1. Open a workbook with an alert and click on the **Alerts** icon.

   The *Alerts* panel displays with the list of alerts.

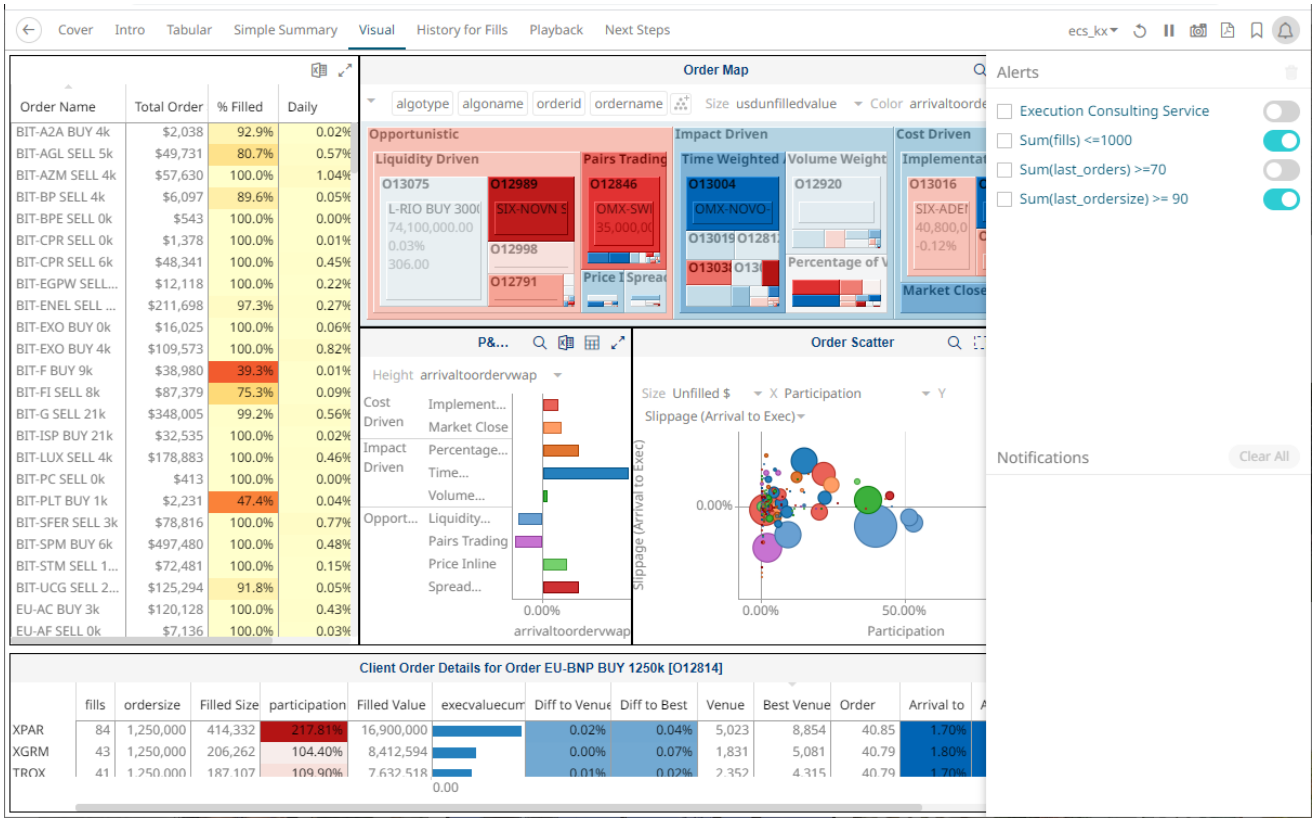


2. Tap the *Activated* slider to turn it on.

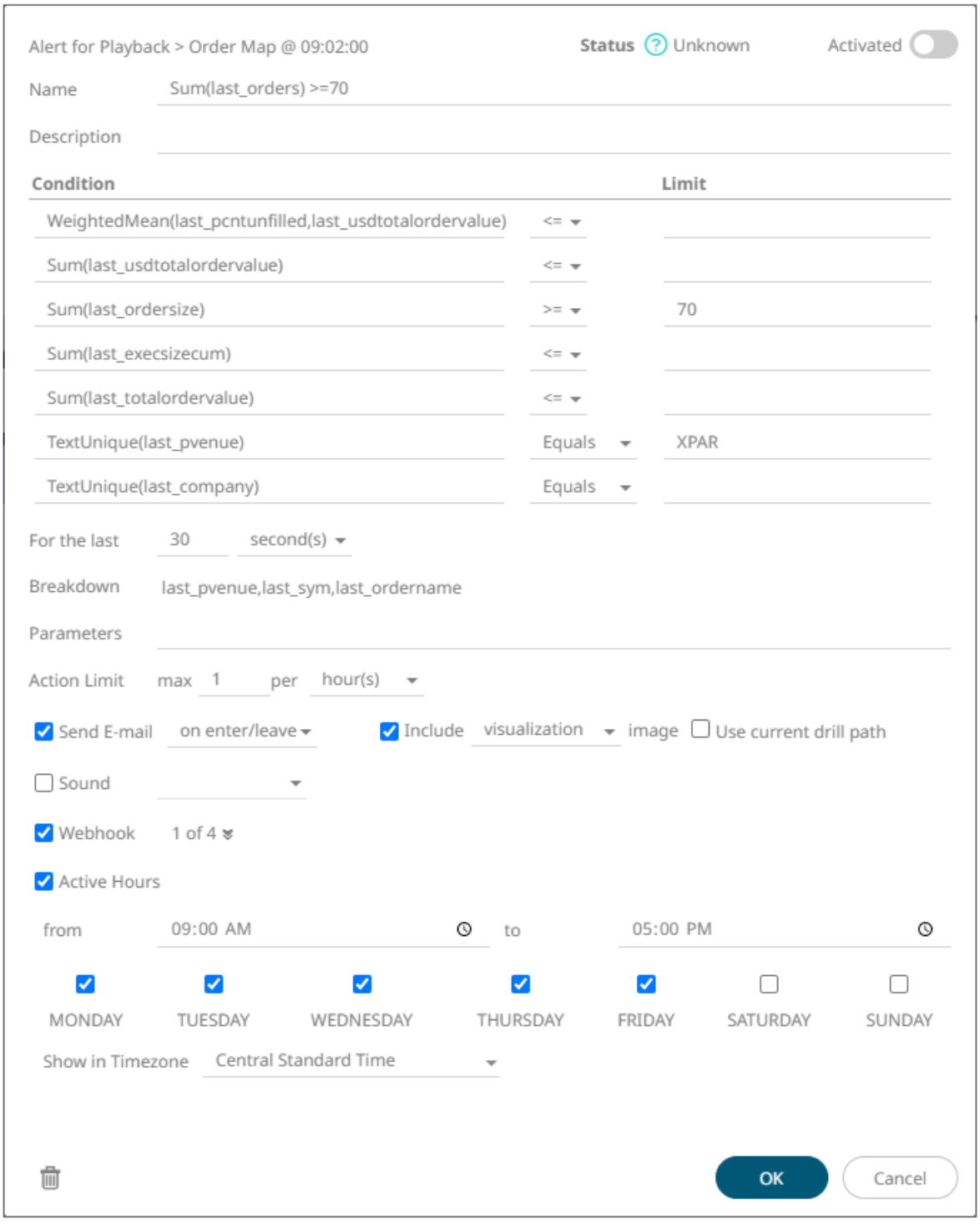
Enabling Alerts on an Alerts Dialog:

1. Open a workbook with an alert and click on the **Alerts** icon.

   The *Alerts* panel displays with the list of alerts.



3. Click an alert. The *Alerts* dialog displays.



4. Tap the *Activated* slider to turn it on and click **OK**.

Sample Email Alerts

An alert is generated when the alert set state changes from **Off** to **On** and recorded in the alert history.

An alert is only issued by email if the alert has not already been sent in the last 'n' minutes as defined in the *Alerts* dialog.

When an alert is issued, an email is sent to the defined email address.

The email includes:

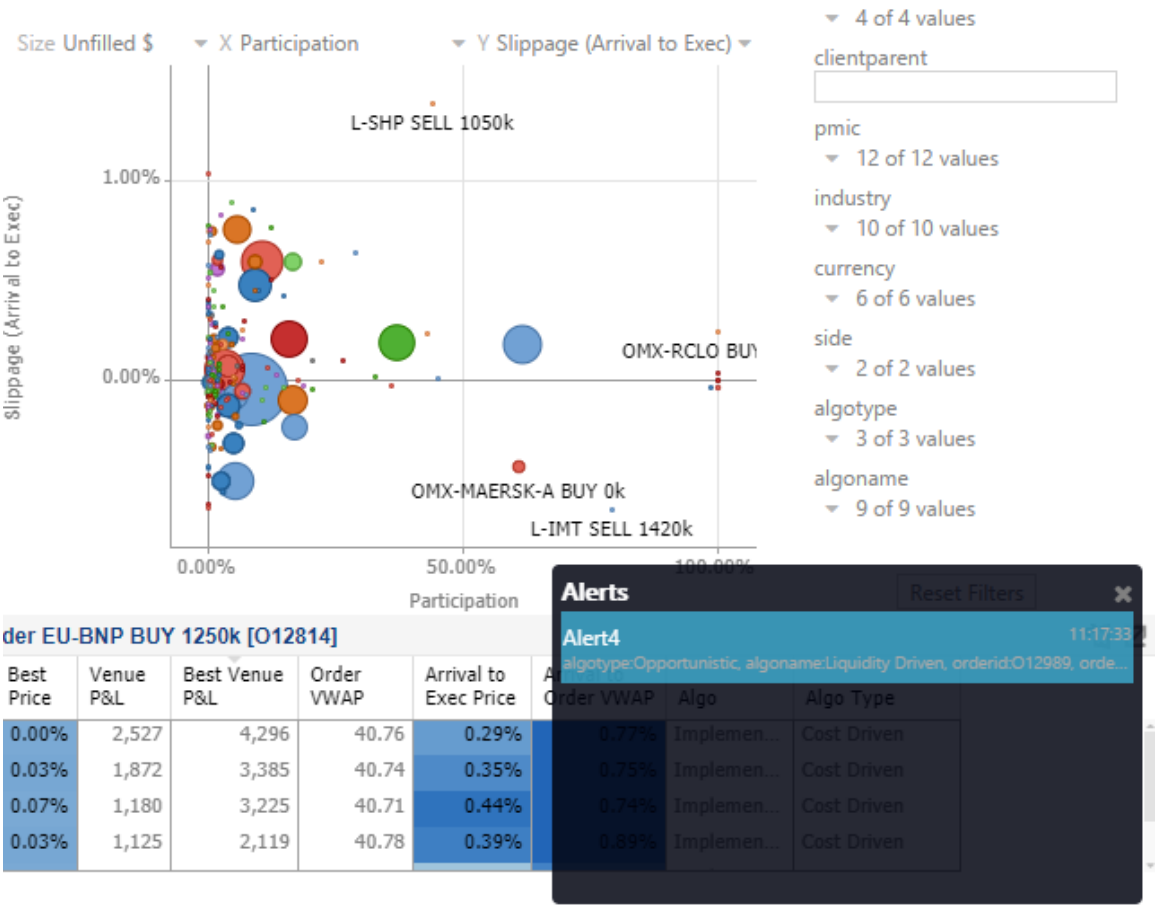
- Link to the workbook or dashboard
- Condition and limit value
- Breakdown
- Name of the visualization where the alert was set
- PNG image of the visualization or dashboard

  All items that do not match the criteria are excluded from the display.

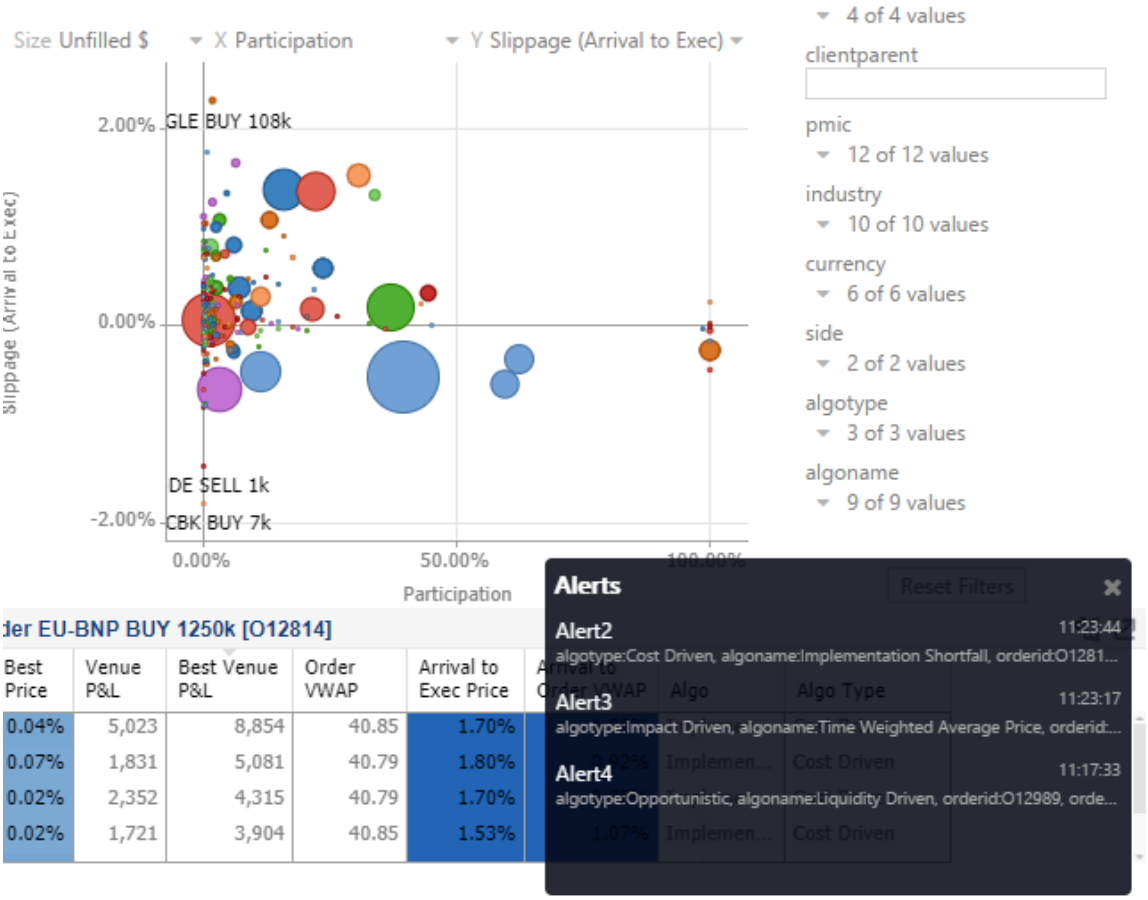
Sample Web Client Alerts

When an alert is triggered, aside from the email notifications, a visual indication or pop-up in active Web clients will draw attention to the alerting visualization or dashboard.

In the example below, an alert initially displays highlighted in blue:

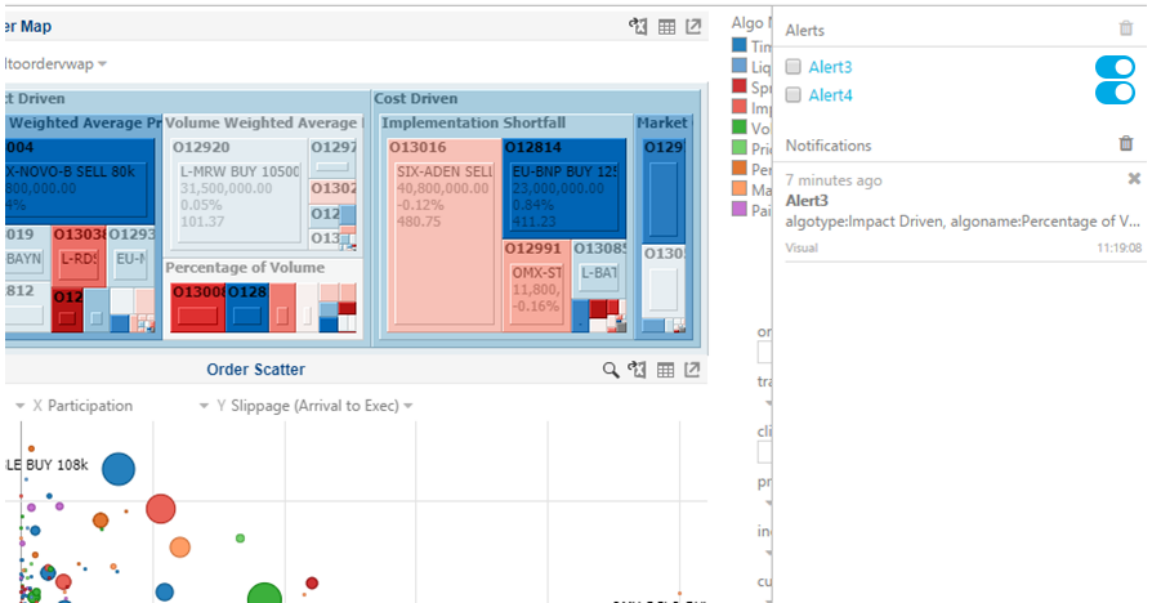


The alert eventually fades away and the pop-up screen fills up with the four latest triggered alerts.

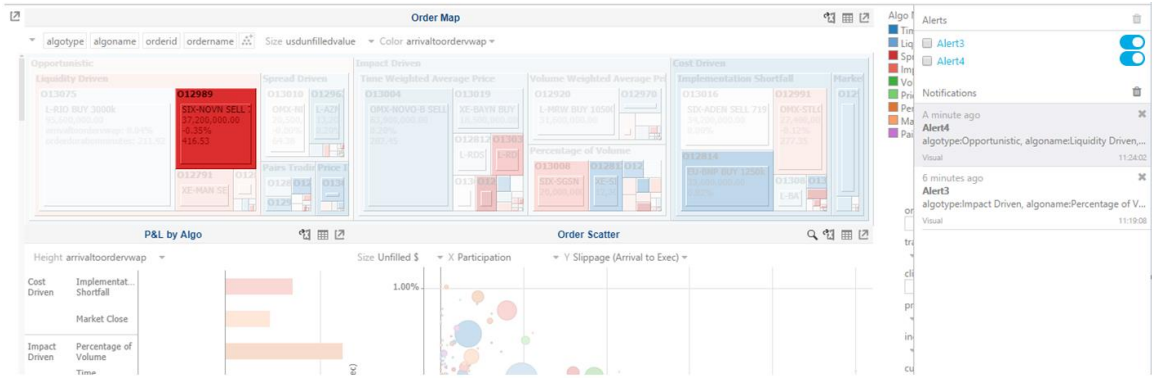


The pop-up stays on screen until it is closed by clicking the button.

Saved alert notifications can be opened on the *Notifications* panel by clicking the icon.



Clicking on a notification highlights the item in the workbook that triggered the alert.



Click the button to delete a notification or click to delete all of the notifications.

[3] WEBHOOKS

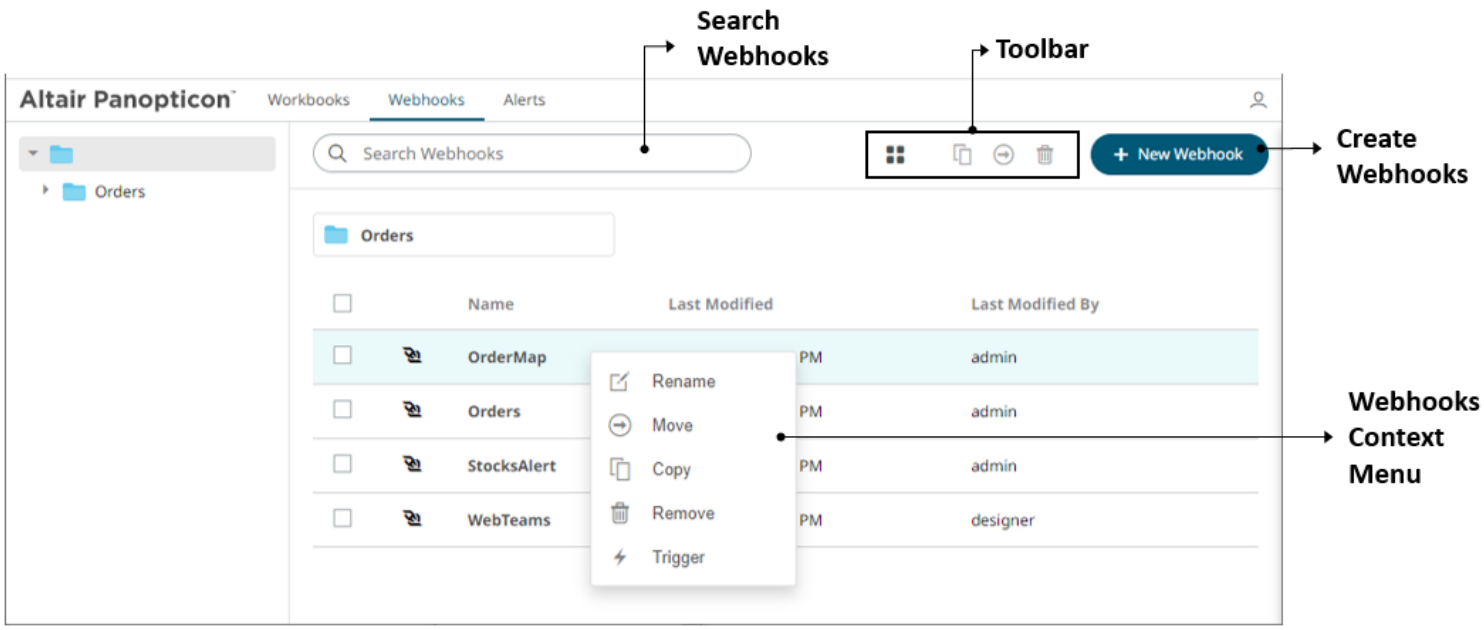
A webhook is a special URL that makes it possible to send a message from other systems into the system that issued the webhook. Webhook URLs should be treated with care and not shared publically, since anyone with knowledge about the webhook URL will be able to use it.

Collaboration platforms such as Microsoft Teams, Slack, and many others, all have support for creating incoming webooks. In Panopticon, outgoing webhooks can be added (based on incoming webhook URLs from other systems) and used as a channel for sending messages about triggered alerts, similar to how such messages can also be sent by email. Webhooks added to Panopticon are stored in the server folder structure and are subject to the same permissions model as workbooks.

An outgoing webhook in Panopticon can be used as the message channel for multiple different alerts in multiple different workbooks, due to the parameterization of the webhook request body. The exact structure and content that you should create in the request body of a webhook will be specified in the documentation of the system that issued the webhook.

NOTE **Do not expect that the example request body shown below, will work as is.**

Starting with version 21.1, users with a Viewer role can create and manage webhooks.



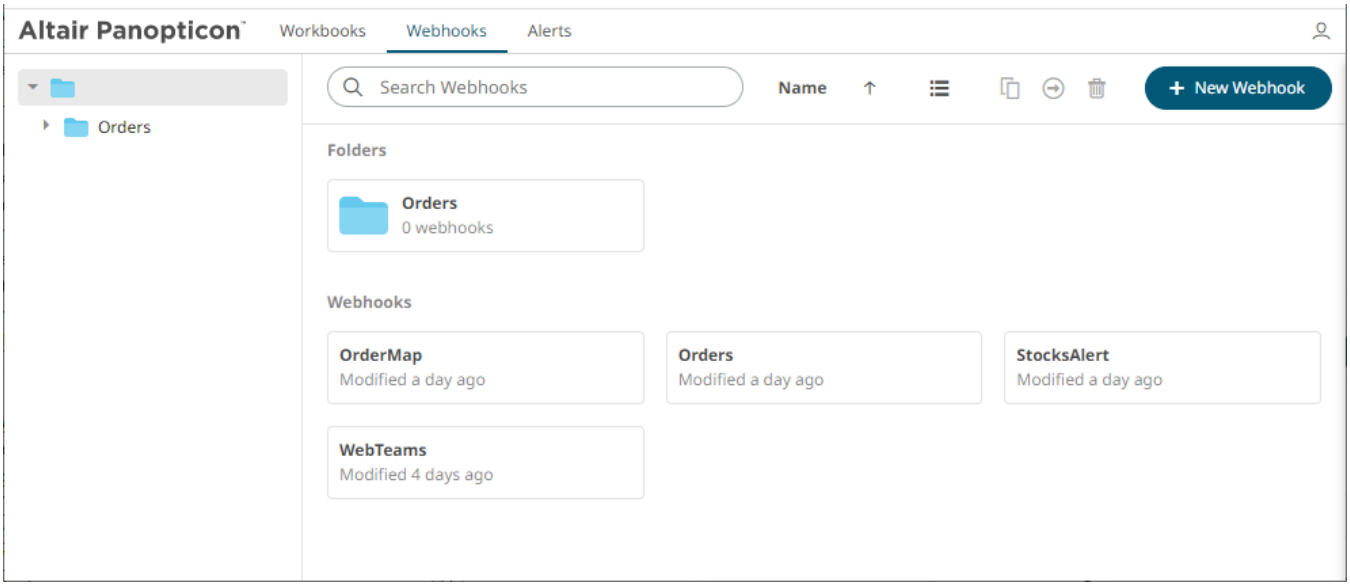
Property	Description
Search Webhooks	Entering text will filter the webhooks.
Toolbar	Allows copying, moving, and removing of webhooks. Also, to display the webhooks list either on *List View* or *Grid View*.
Create Webhooks	Allows creating new webhooks.

Webhooks Context Menu	Allows renaming, moving, copying, deleting, and enabling of the trigger of webhooks.

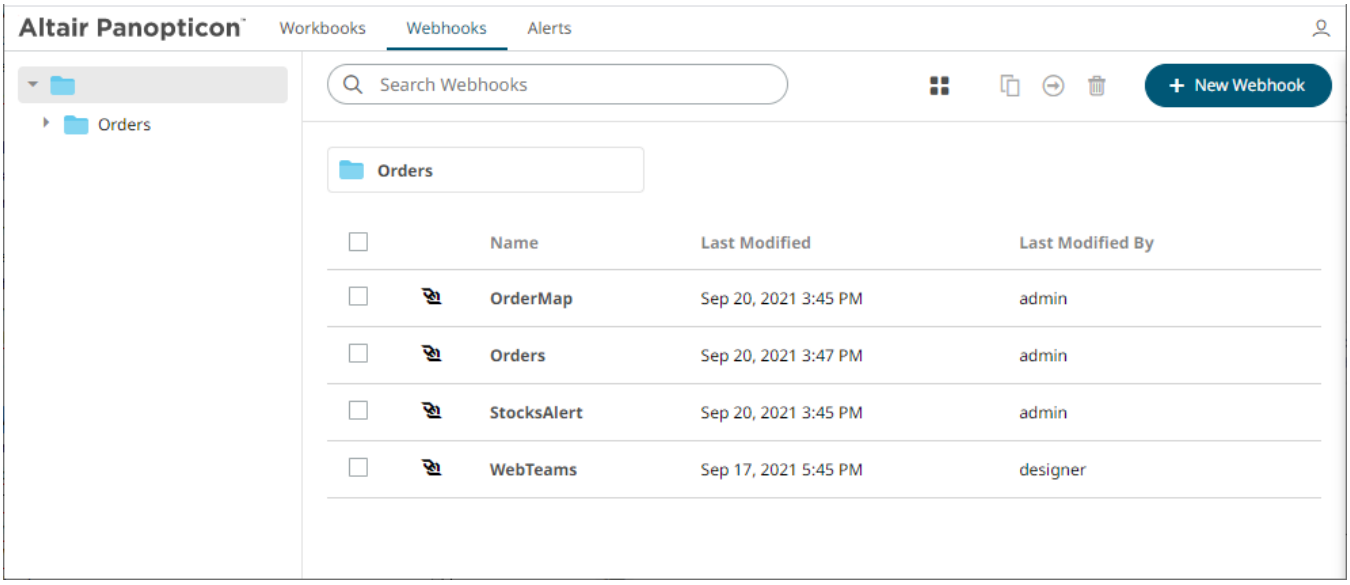
Folders and Webhooks Display View

Webhooks can be displayed either on a *List* or *Grid View*.

On the *Toolbar*, click **Grid View** . The folders and webhooks are displayed as thumbnails.



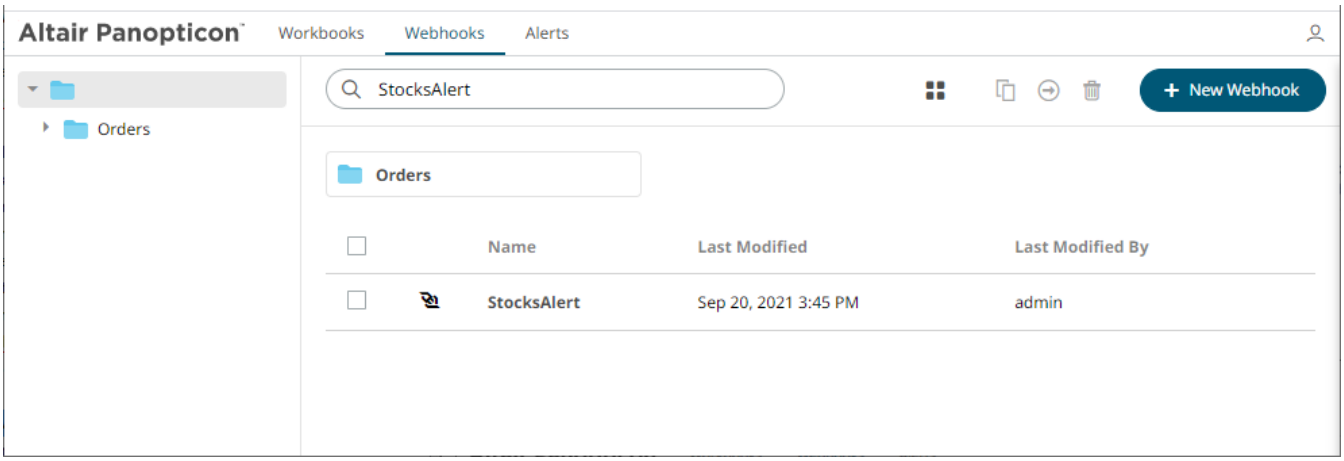
Or click **List View** , the folders and webhooks are displayed in a standard listing.



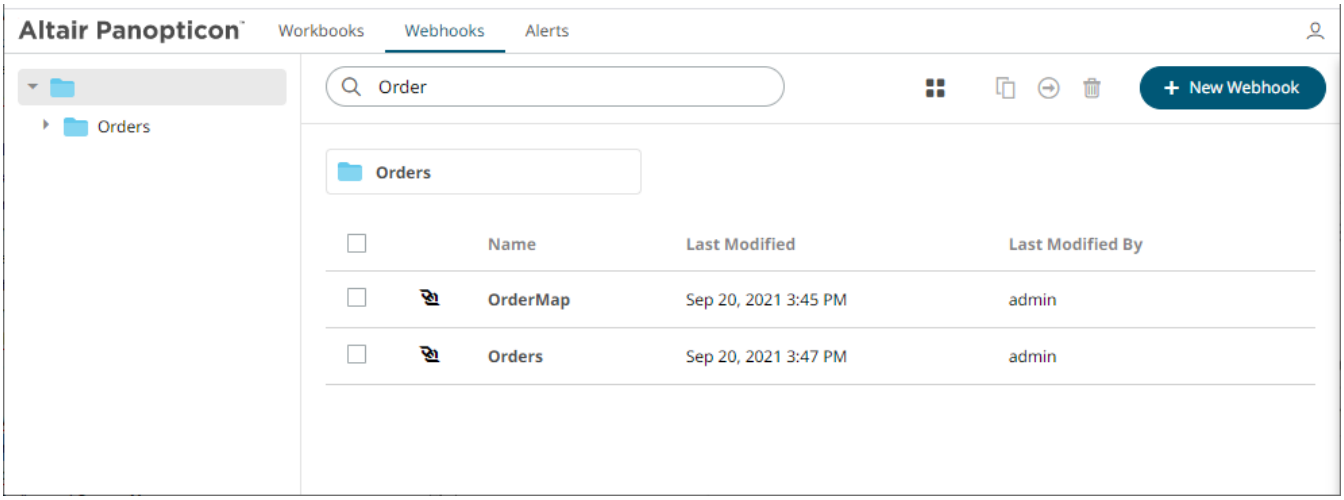
On either display view style, clicking on a webhooks title or thumbnail displays the *Webhooks* page.

Searching for Webhooks

On the *Webhooks* tab, to search for a particular webhook, enter it in the *Search Webhooks* box.



You can also enter one of more characters into the *Search Webhooks* box then click **Enter**. The suggested list of webhooks that matched the entries will be displayed.



Click on a webhooks to open and display.

To clear the filter, delete the text entry in the *Search Webhooks* box.

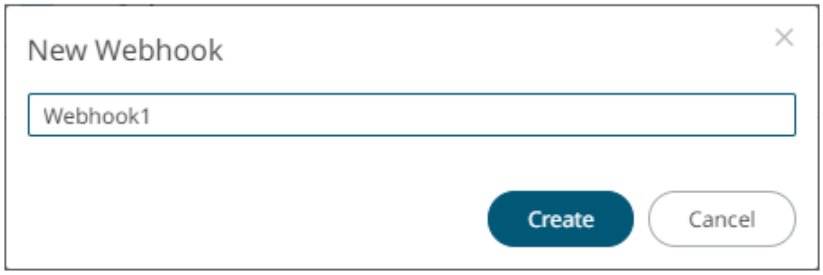
CREATING WEBHOOKS

This section discusses the intructions and guidelines in creating webhooks.

Steps:

1. On the **Webhooks** tab, click on a folder then + New Webhook .

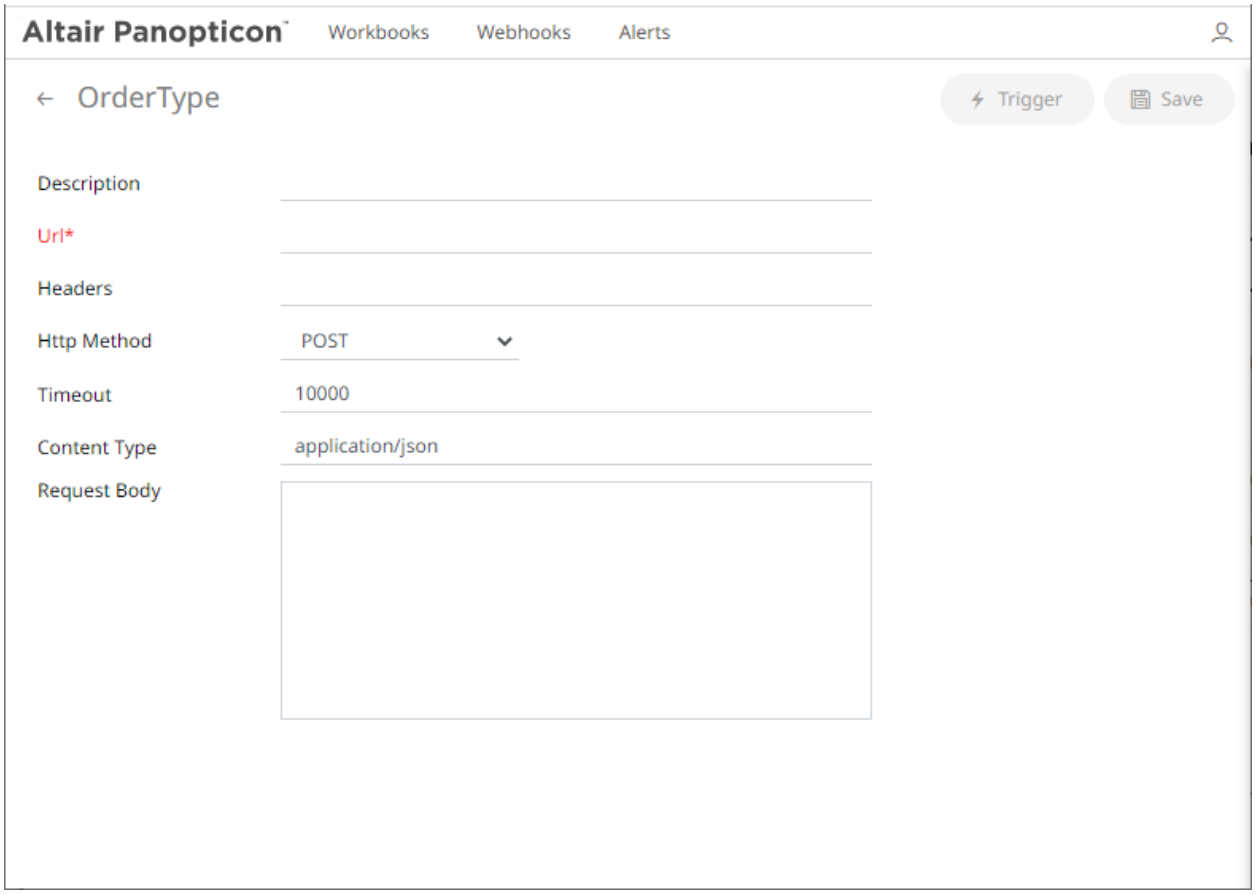
   The *New Webhook* dialog displays.



2. Enter the name of the webhook then click

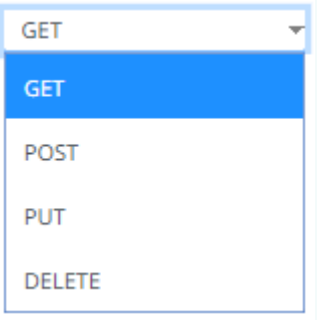
.

   The new webhook is displayed on the *Webhook* page.



3. Enter or select the following webhook properties:

Property	Description
Description	Description of the webhook.
URL	URL of the webhook. This property is required.
Headers	A comma separated list of name=value pairs representing HTTP headers.
HTTP Method	Select the appropriate HTTP method for the request from the following options:

	 • GET – retrieve data • POST – add new data • PUT – replace existing data • DELETE – remove existing data
Timeout	Timeout (in ms) for reading a response from the URL.
Content Type	The content type of the request body. Default is **application/json.**

Request Body	The request body to be supplied to the HTTP call.
	For example:
	`{`
	`'Alert title': '{_alert_title}',`
	`'Alert dashboard URL': '{_alert_dashboard_url}',`
	`'Alert description': '{_alert_description}',`
	`'Alert reason': '{_alert_reason}',`
	`'Triggering items': '{_alert_triggering_items}',`
	`'Timestamp': '{_current_time}',`
	`'Folder': '{_workbook_folder}',`
	`'Workbook': '{_workbook_name}',`
	`'Dashboard': '{_dashboard_name}'`
	`}`

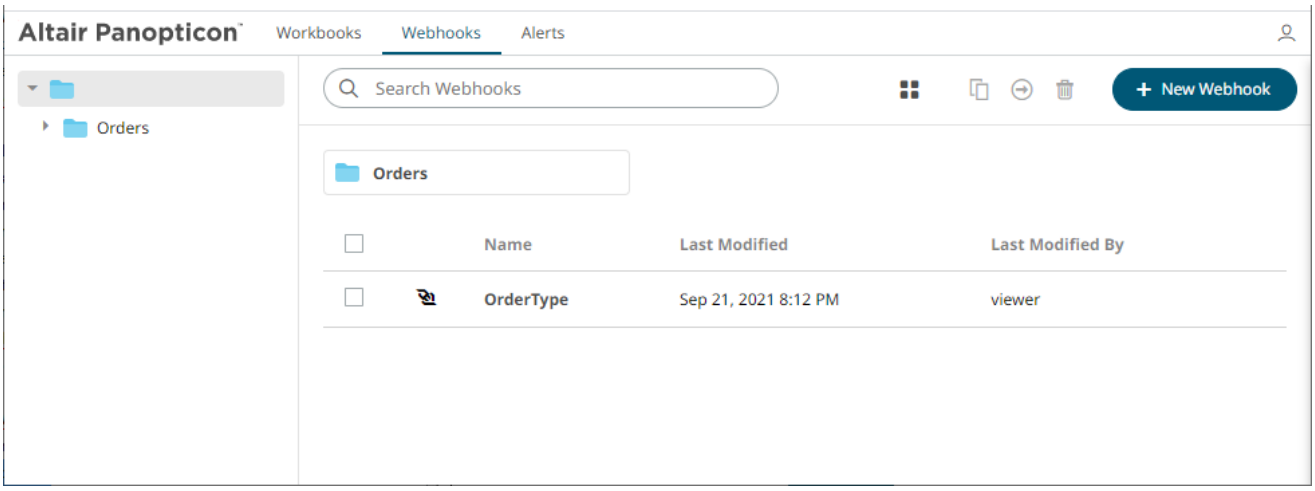
4. Click to save the new webhook.

5. You may opt to click to trigger the webhook. Any parameter in the request body will be replaced by its value when triggering the webhook request.

   For example:

   `{_current_time} - 2021-07-01T12:34:56Z`

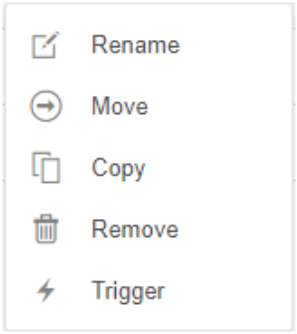
6. Click ← to go back to the *Folders and Webhooks* list. The new webhook is added on the list.



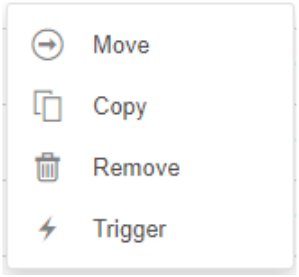
WEBHOOKS TOOLBAR AND CONTEXT MENU

Moving, copying, and removing webhooks can either be done using:

- Context menu



Webhook Context Menu



Webhooks Folder Context Menu

- Toolbar

List View

Grid View

The *Webhooks* toolbar options include:

Toolbar Option	Description
Sort By / Sort Order	Allows sorting webhooks by *Name, Last Modified,* or *Last Modified By*.
Display View	Display webhooks either by *List View* or *Grid View*.
Copy	Copy webhooks to another folder or subfolder where the user has permission.

Move	Move webhooks to another folder or subfolder where the user has permission.
Remove	Remove webhooks.

The *Context Menu* options include:

Toolbar Option	Description
Rename	Rename the webhook.
Move	Move webhooks to another folder or subfolder where the user has permission.
Copy	Copy webhooks to another folder or subfolder where the user has permission.
Remove	Remove webhooks.
Trigger	Trigger the webhook.

Sorting Webhooks

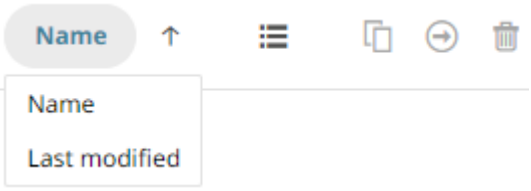
Sorting webhooks can be done by **Name, Last Modified**, or **Last Modified By**.

Steps:

On the *Webhooks* tab, either:

- click the **Sort By** option on the *Toolbar* of the *Grid View.*

  By default, the sorting is by **Name**.

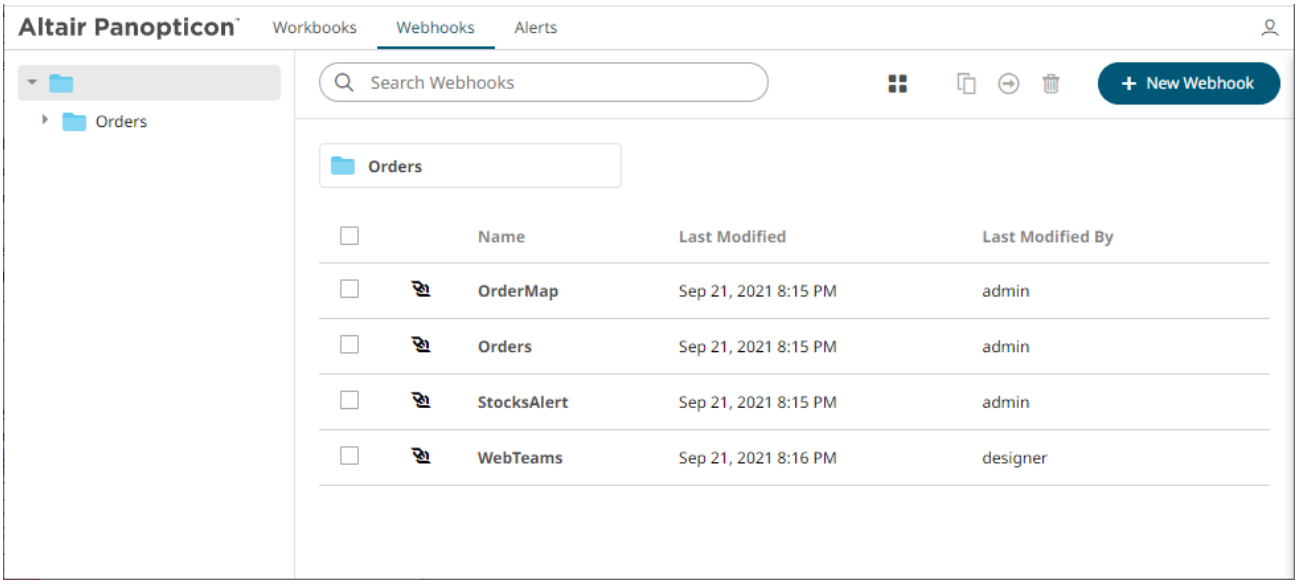
  

  - Name
  - Last Modified

  Then click the *Sort Order*:

  - Ascending
  - Descending

- click on the **Name**, **Last Modified**, or **Last Modified By** column header of the *List View.*



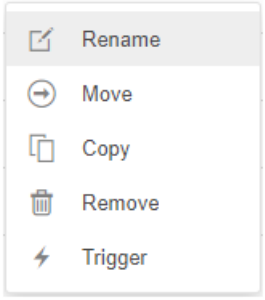
Then click the *Sort Order*:

- Ascending
- Descending

Renaming a Webhook

Steps:

1. Right-click on a webhook then select **Rename** on the context menu.



The *Rename Webhook* dialog displays.

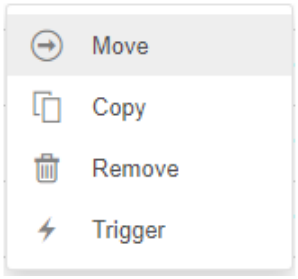
2. Enter a new name then click Rename.

Moving Webhooks

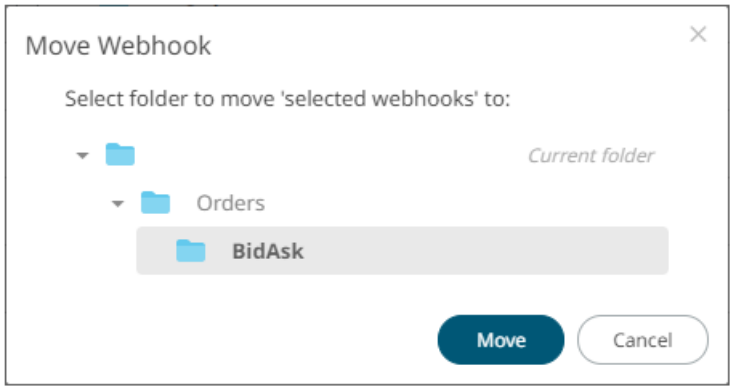
Users with a Viewer role are allowed to move webhooks to another folder or subfolder where they have permission.

Steps:

1. Check the box of one or several webhooks either on the *Grid View* or *List View*.
2. Then select either:
   - the **Move** icon on the toolbar
   - **Move** on the content menu

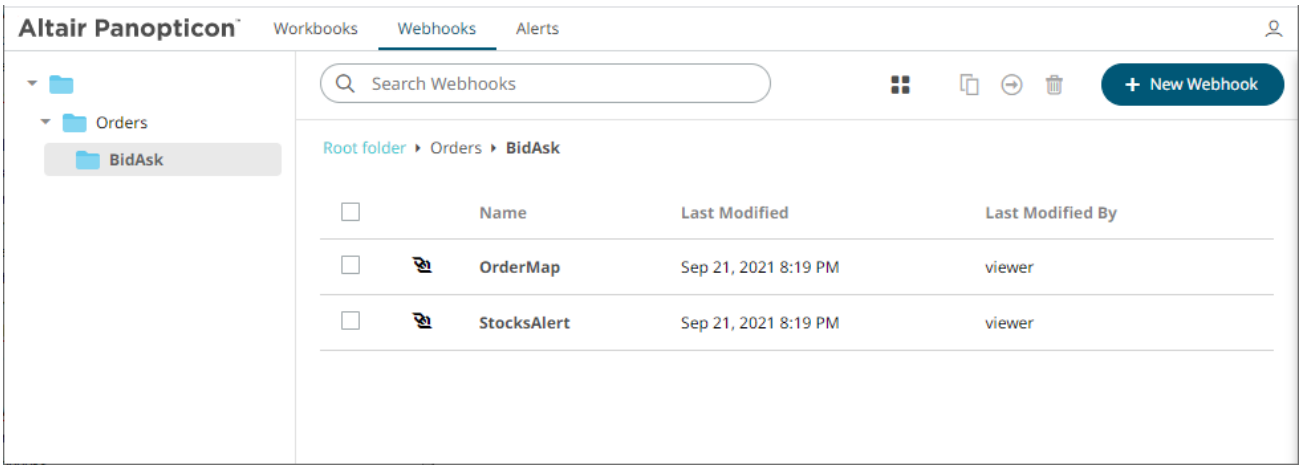


The *Move Webhook* dialog displays with the folder or subfolders that the user is allowed to move the webhooks. Select the folder or subfolder.



3. Click Move.

The webhooks are moved and displayed on the selected folder.

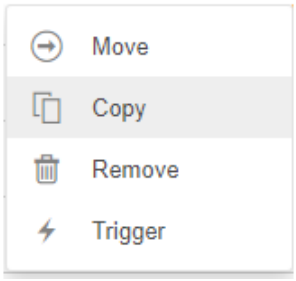


Copying Webhooks

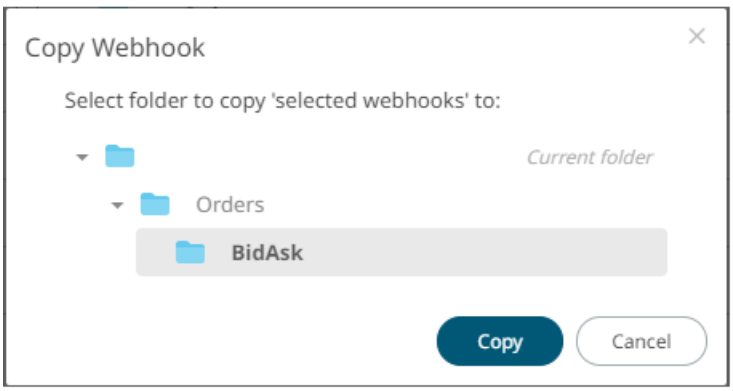
Users with a Viewer role are allowed to copy webhooks to another folder or subfolder where they have permission.

Steps:

1. Check the box of one or several webhooks either on the *Grid View* or *List View*.
2. Then select either:
   - the **Copy** icon on the toolbar
   - **Copy** on the content menu

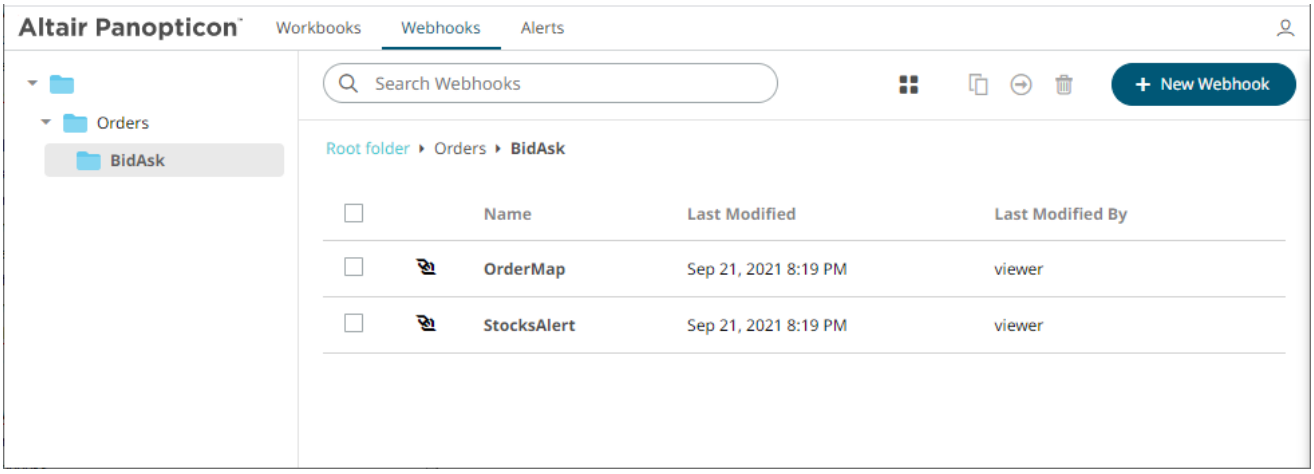


The *Copy Webhook* dialog displays with the folder or subfolders the user is allowed to copy the webhooks to. Select the folder or subfolder.



3. Click Copy .

   The webhooks are copied and displayed on the selected folder.



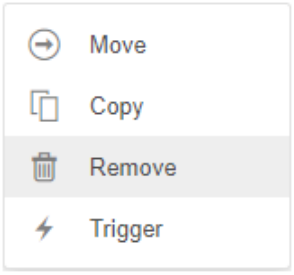
Deleting Webhooks

Users with a Viewer role have the ability to remove webhooks.

Steps:

1. Check the box of one or several webhooks either on the *Grid View* or *List View*.
2. Then select either:

   - the **Remove** icon on the toolbar
   - **Remove** on the content menu

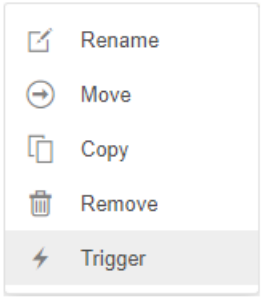


   A notification message displays.

3. Click Yes to remove.

Triggering Webhooks

To trigger a webhook, right-click on it and select **Trigger** on the context menu.



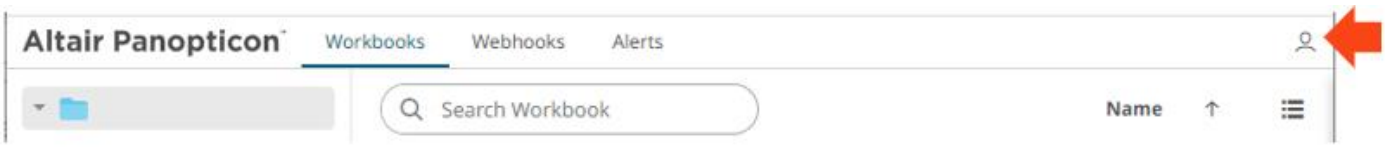
Any parameter in the request body will be replaced by its value when triggering the webhook request.

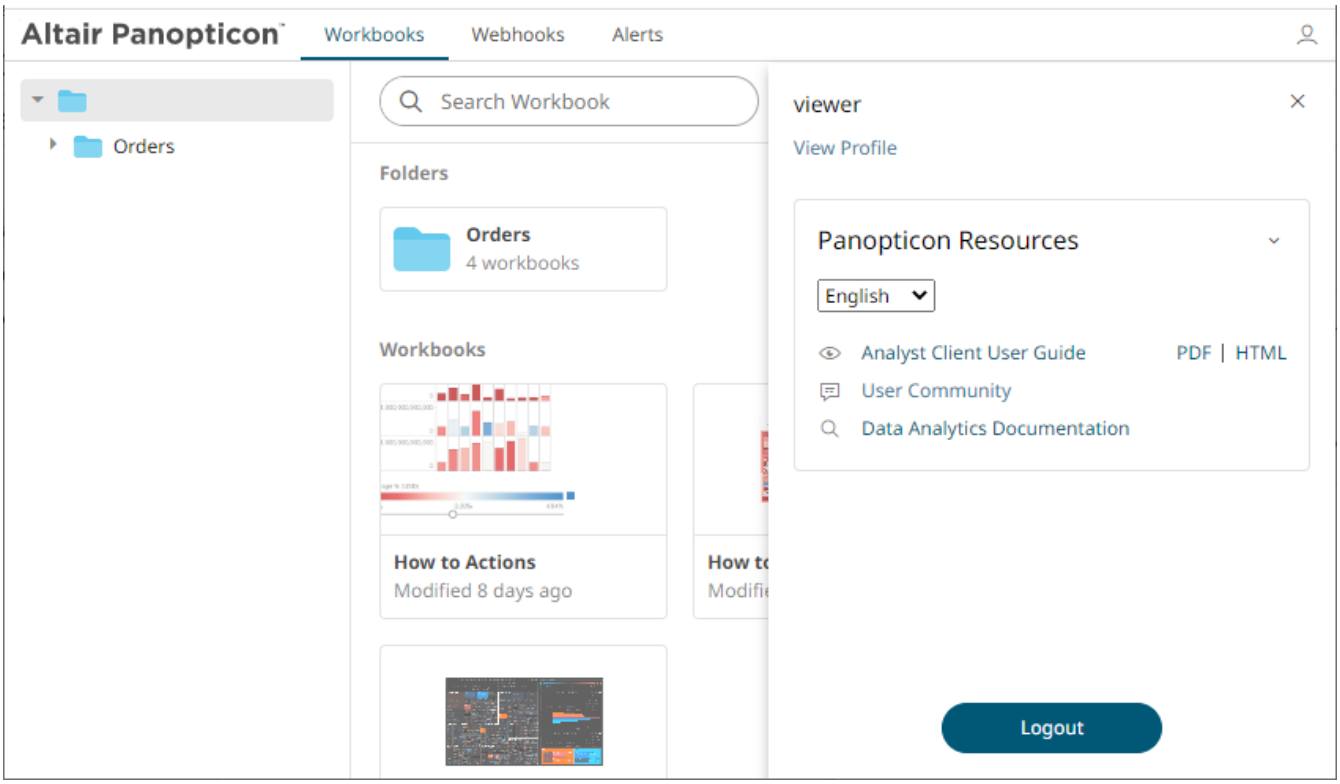
For example:

```
{_current_time} - 2021-07-01T12:34:56Z
```

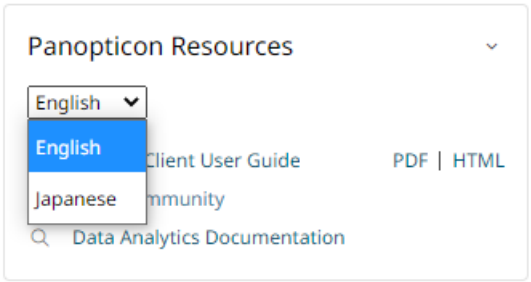
[4] PANOPTICON RESOURCES

Clicking on the top right section of the toolbar displays the other Panopticon online resources that users with a Viewer role can access.





Select the *Language* on the drop-down list: **English** or **Japanese**.



Resource	Description
Analyst Client User Guide	Panopticon Visualization Server documentation for users with a Viewer role which consists of: • viewing and analysing of workbooks • creating, monitoring, and deleting of alerts Available upon installation.
User Community	Link to the Panopticon User Community page.
Data Analytics Documentation	Link to the Altair Data Analytics Documentation page.

12.2021

CONTACT US

GET IN TOUCH

We'd love to hear from you. Here's how you can reach us.

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