Altair® Panopticon™
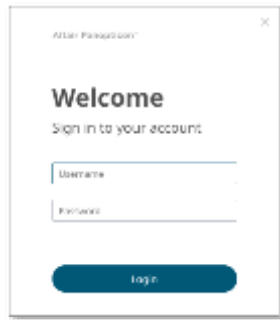
PANOPTICON WEB AUTHORING QUICK START GUIDE

1 LOG ON TO THE PANOPTICON VISUALIZATION SERVER

1. On the Panopticon Visualization Server, click **Sign In**.

2. Enter the *Username* and *Password.*
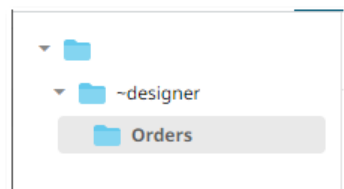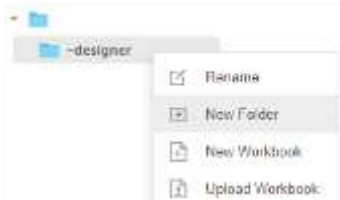
3. Click **Login**.

The *Workbooks and Folders* page displays with the personal folder where users with a Designer role can create workbooks and build dashboards.

2 CREATE A FOLDER AND ASSIGN PERMISSIONS

Workbooks can be saved, uploaded, copied, or moved to folders or subfolders where they can inherit the access or restriction settings.

1. Right-click on the personal folder and select **New Folder** on the context menu.

2. Enter the *Folder Name* in the *Create Folder* dialog and click ✛ beside the *Allowed* section. Select a *Group* that will be granted permission.

3. Select **MODIFY + WRITE + READ** and click ✓ . This means the group will be able to read, modify, and write to the folder as well as create subfolders.

4. Click **Create**. The folder is displayed on the *Folders* list.

3 CREATE A NEW WORKBOOK AND CONNECT TO DATA

To create a new workbook, click **+ New Workbook**. Enter the name and click **Create**.

This opens the *Open Workbook on Edit Mode.*

To proceed in creating workbooks, data tables must be added first.
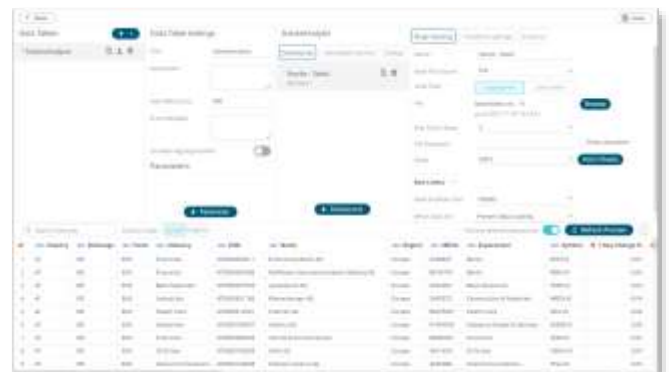
On the *Data Table* pane, click ➕.

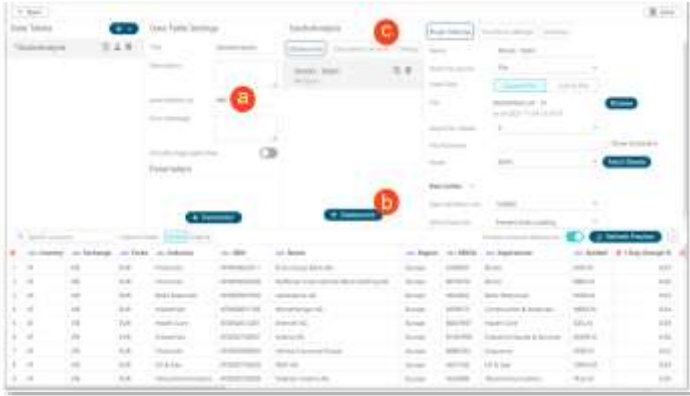This opens the *Edit Data Table* layout*.* Select a data source to create a new table.

EXAMPLE: MS EXCEL DATA SOURCE

1. Select *MS Excel* in the *Connector List* pane. Click **Upload File** then browse to an MS Excel file and select it.

2. Select the sheet and the data access method to use.

3. Define initial settings.

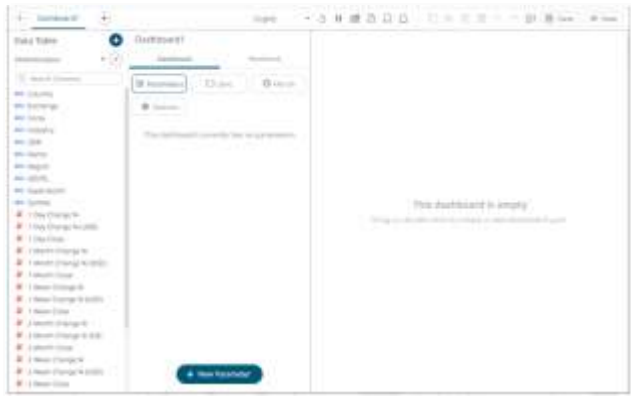4. Click **Refresh Preview**. The preview of the data table is displayed.

4 DEFINE/REFINE YOUR DATA TABLE USING THE EDIT DATA TABLE LAYOUT

1. Enter the name of the data table and click ✓ . Then give a description and set the *Auto Refresh* (a).

2. Click **+ Datasource** to add more data sources to the data table (b).

3. Click **Calculated Columns** to display the *Calculated Columns* pane and create new calculated columns in the data table (c).

4. Click **💾 Save** to save the changes then click **← Back** to close the *Edit Data Table* layout and go back to the *Open Workbook in Edit Mode*.
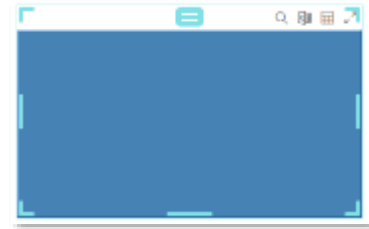
The data table is displayed.

5 ADD A VISUALIZATION

1. Draw a rectangle on the dashboard canvas to create a visualization. The *Select Part* pane displays with the available visualization parts.

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

3. Drag columns from the *Data Table* pane to the *Visualization Settings* pane to define the hierarchical breakdown and visualization variables (e.g., Size, Color, Icons, and so on).

6 ENHANCE YOUR VISUALIZATION

ADD LEGENDS

1. Draw another rectangle on the dashboard canvas and click **▽ Control** then the **Color Legend** icon. You will see a skeleton image of the legend.

2. On the *Color Legend Settings* pane, define the linked part and other settings.

The color legend displays.

ADD FILTERS

1. Draw another rectangle on the dashboard canvas and click **▽ Control** then the **Filter Box** icon. You will see a skeleton image of the filter.
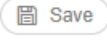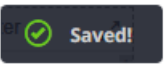
2. On the *Filter Box Settings* pane, enter the *Title* and define the other settings. Then drag and drop text columns from the *Data Table* pane.

△ **ALTAIR**

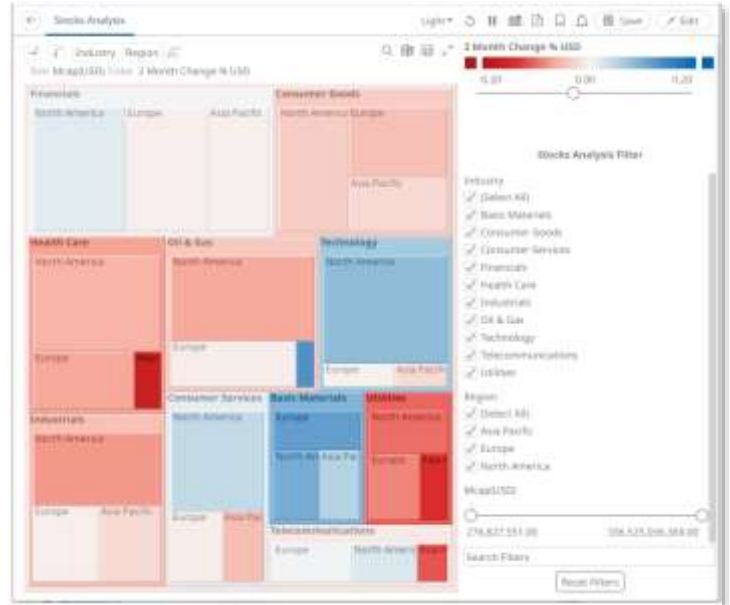The filter type will automatically adjust, depending on the number of unique values.

3. Click on a filter column to expand and modify the settings as required.

7   DEFINE THE DASHBOARD AND WORKBOOK SETTINGS

1. On the *Dashboard and Workbook Settings* pane, click the **Workbook** tab then the **Options** ⚙ Options button.

2. Enter and select the *Workbook*, *Visualization*, and *PDF Report* settings.

8 SAVE YOUR WORKBOOK

If you wish to save your workbook, click the **Save** 🖫 Save icon on the toolbar. Once saved, the ⊘ Saved! notification is displayed.

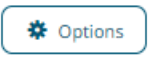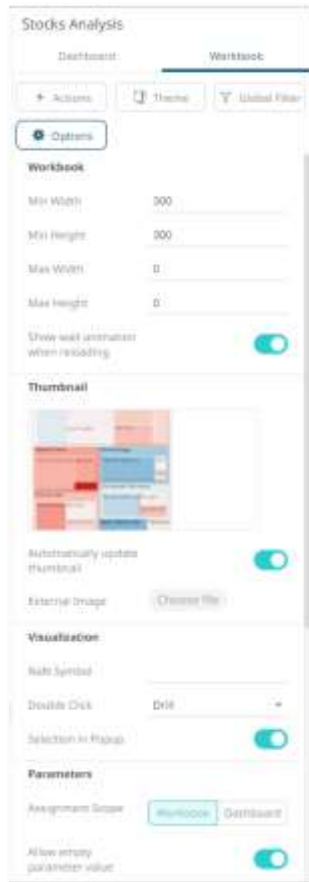To display the workbook in *View Mode*, click 👁 View .

The right-click context menu provides several visualization options such as, creating alerts, filtering, drilling, zooming, and copying or exporting of data.

■ NEXT STEPS

Use Altair Panopticon's comprehensive documentation to help you create better visualizations:

- Panopticon Web Authoring Guide
- Analyst Guide
- Visualization Guide

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