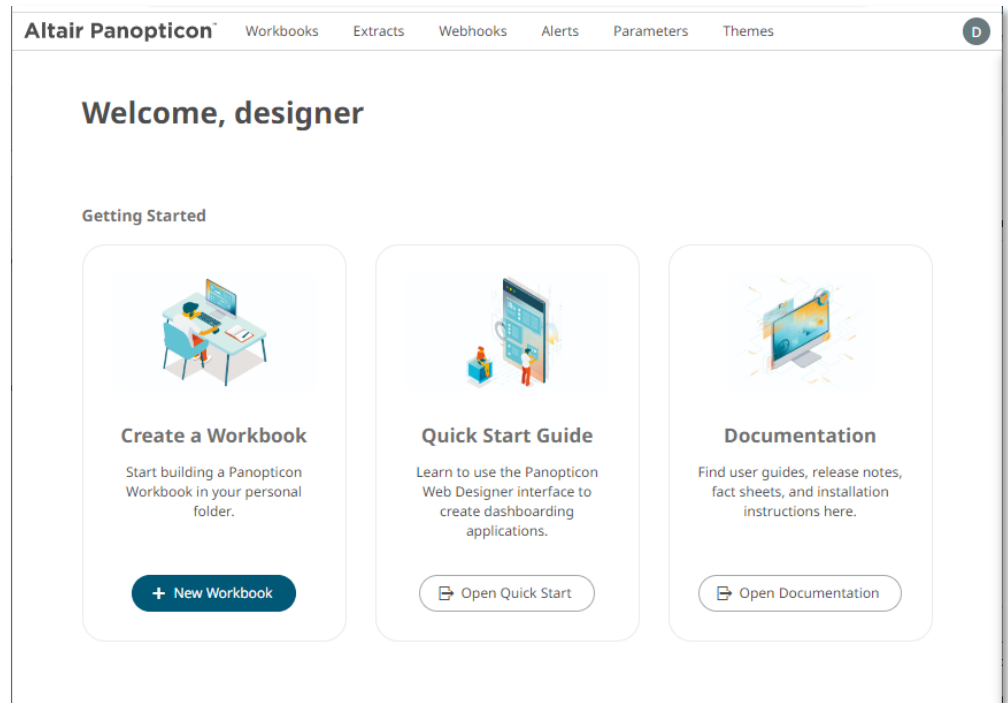


LAUNCH ALTAIR PANOPTICON REAL TIME

The *Welcome* page is the first screen that displays when you log on to Panopticon Real Time. This page can also be accessed by clicking the **Altair Panopticon** logo on the header.

A user with a Designer role can perform the following from this page:

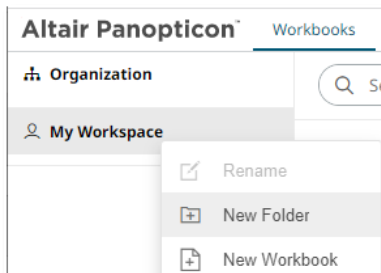
- Open recently viewed workbooks (if available)
- Create a new workbook
- Access the Web Authoring Quick Start
- [View online documentation and help](#)



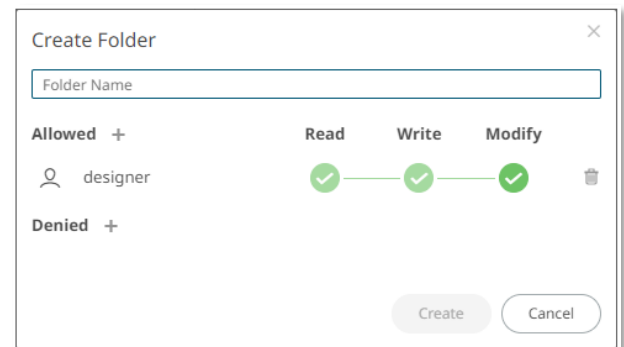
CREATE A FOLDER AND ASSIGN PERMISSIONS

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

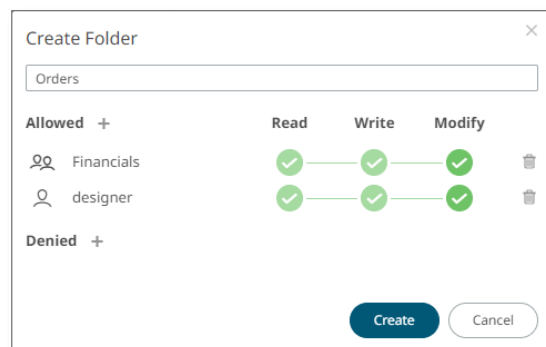
1. Select the **Workbooks** tab, then right-click on **My Workspace** and select **New Folder** in the context menu.



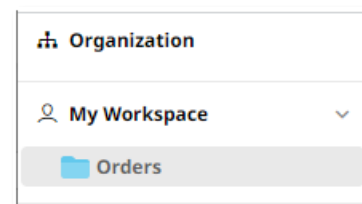
2. Enter the *Folder Name* in the *Create Folder* dialog and click **+** beside the *Allowed* section. Select a *Group* that will be granted permissions.



3. Select **READ + WRITE + MODIFY** 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.



BUILD A WORKBOOK

Visual Data Discovery is performed through **workbooks**. A workbook is a collection of:

- ☐ Dashboards (Visual Layouts)
- ☐ Data Tables (Data Query and Schema Definitions)
- ☐ Actions (Contextual Interaction Definitions)
- ☐ Overall styling

Dashboards may consist of several parts including: visualizations, legends, filters, action controls, labels, and images.

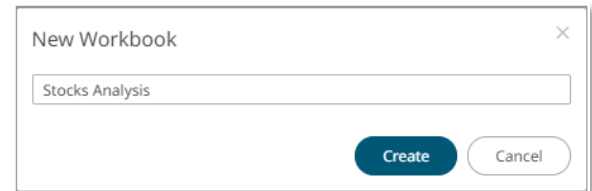
You can build, modify, and deploy sophisticated dashboards in minutes with a drag-and-drop interface.

MORE INFORMATION HERE

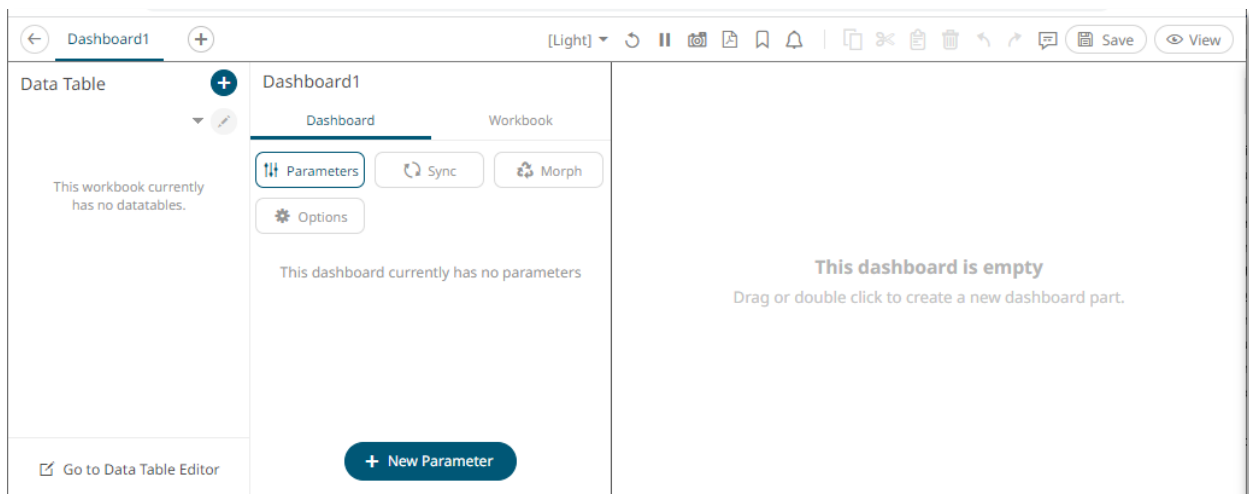
Online Help: [Working with Open Workbook in Design Mode](#)

1 CREATE A NEW WORKBOOK


Select a folder then click **+ New Workbook**. Enter the workbook name and click **Create**.

A dialog box titled "New Workbook" with a close button (X) in the top right corner. It contains a text input field with the value "Stocks Analysis". At the bottom right, there are two buttons: "Create" (highlighted in blue) and "Cancel".

This opens the *Open Workbook in Design Mode*.



The dashboard name by default is editable. Enter a descriptive name.

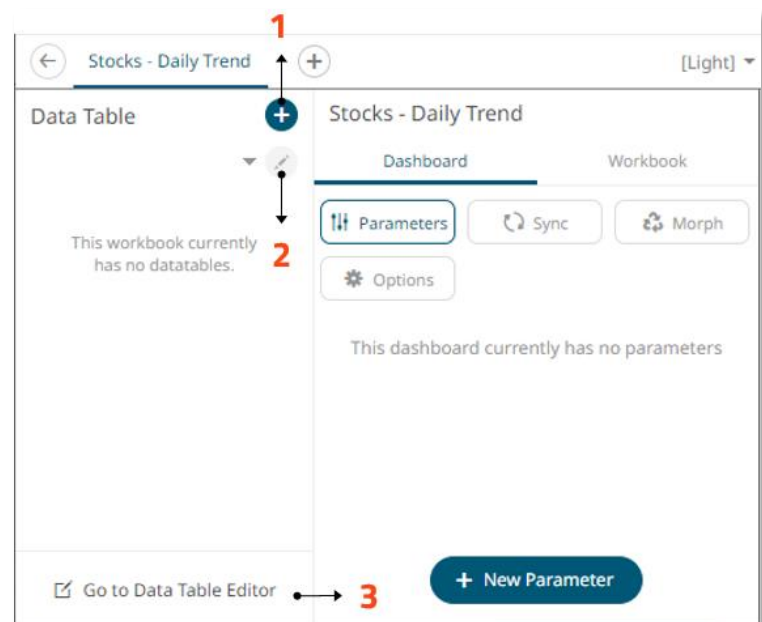
A close-up of the dashboard name field. It shows a text input field with the value "Stocks - Daily Trend" highlighted in blue. The field is flanked by a back arrow on the left and a "+" icon on the right.

To proceed in creating the workbook, data tables must be added first. The data table definition can be unique to a single workbook. You can also save the data table definition locally for other users or publish the data table template.


On the *Data Table* panel, there are three options available to add and configure data tables:

- 1 - Opens the *Add Data Table Wizard*.
- 2 - Opens the *Edit Data Table Wizard*.
- 3 - Opens the old *Data Table Editor* view.

These options allow you to connect to data environments with pre-built connectors to a wide variety of sources right out of the box.



2 WORK WITH THE ADD DATA TABLE WIZARD

Click  on the *Data Table* panel.

The interface of the *Add Data Table Wizard* consists of three steps:

1 Select Connector

- Click a connector group tab (**File/URL**, **Database**, or **Streaming**).
- Then the connector you will use.

2 Configure

- Define the settings of the selected connector.
- When the necessary properties have been defined, the

Next

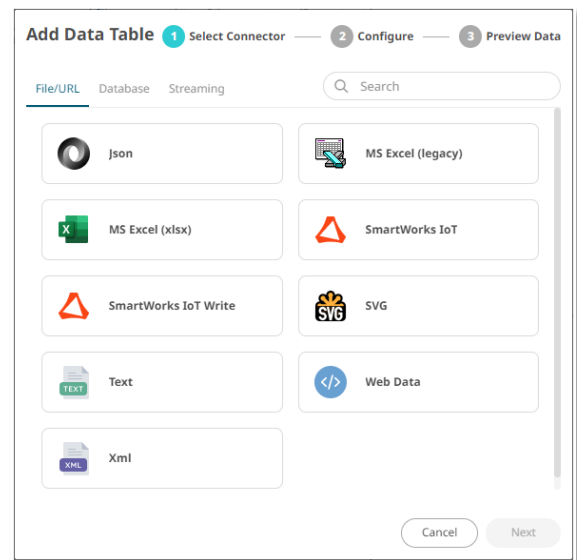
button is enabled.

Next

- Click to move to the next step.

3 Preview Data

Display the preview of the data table you are creating.



This page allows you to check the data information and perform any of the following:

1 Search Columns

Allows searching of columns in the *Data Preview*.

2 Data Preview

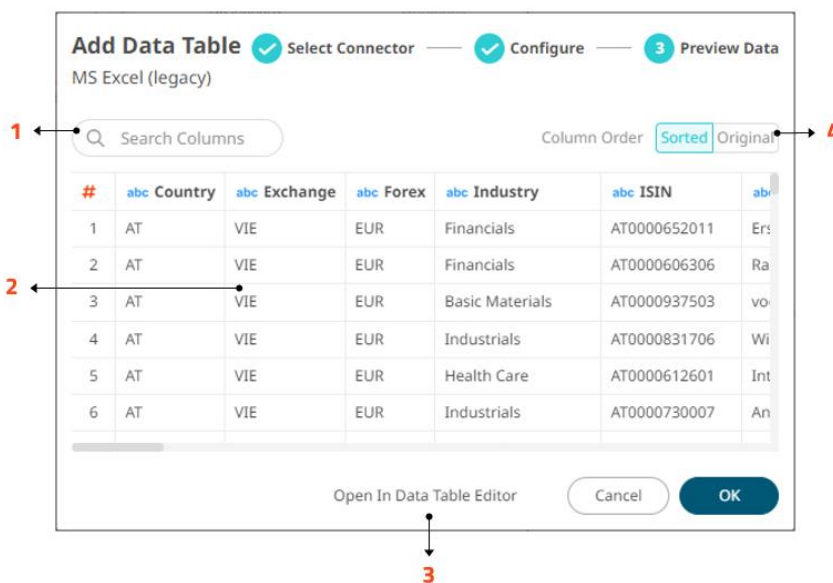
Executes the queries to return and display data.

3 Open in Data Table Editor

Displays the *Data Table Editor* where you can further configure the data table.

4 Group and Sort Columns

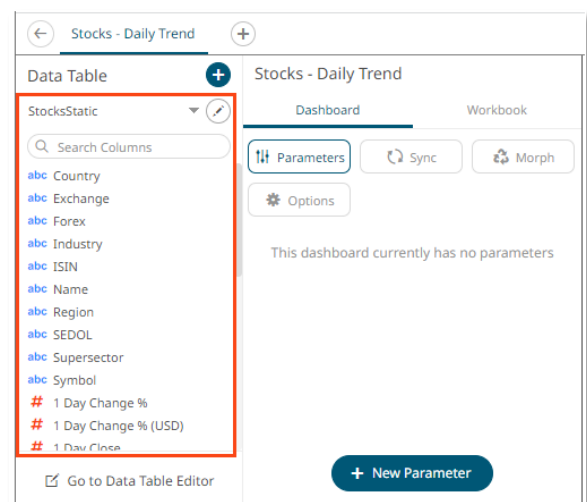
Allows grouping and sorting columns.



OK

Click to save the changes and close the wizard.

Your data will be displayed in the columns of the *Data Table* panel.



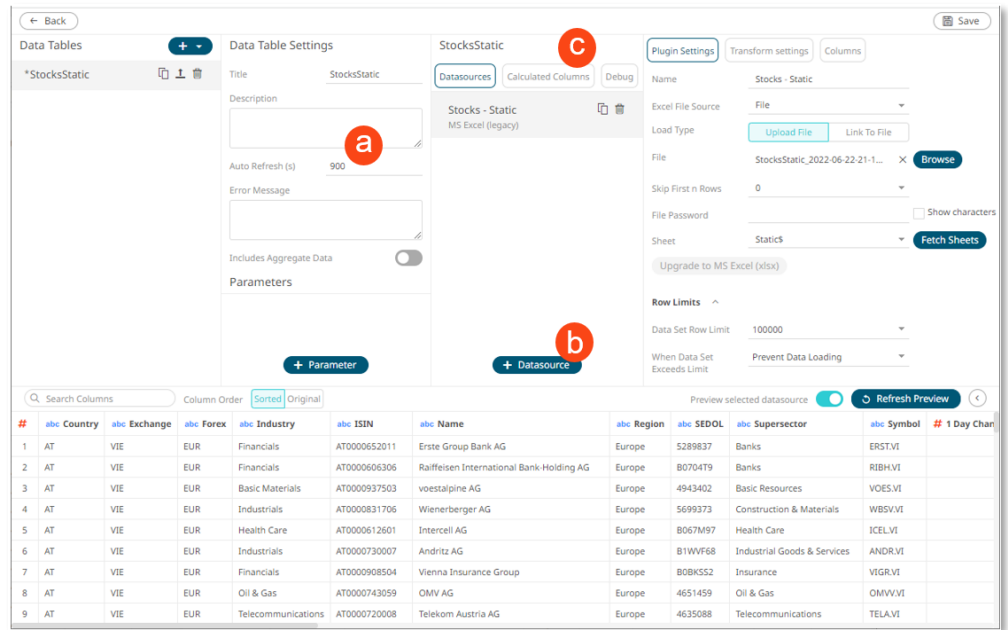
3 REFINE YOUR DATA TABLE USING THE DATA TABLE EDITOR VIEW

On the *Data Table* panel, click [Go to Data Table Editor](#)

The *Data Table Editor* allows you to quickly connect to any data source and combine data from multiple sources so you can visualize all your data in a single visualization.

However, to get the most of these data and produce effective visualizations, they may need to be:

- ☐ Integrated with other data sources or files to produce a data with more sense
- ☐ Transformed for normalization and aggregation



While in the *Data Table Editor* view:

1. Enter a description of the data table 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* panel and create new calculated columns in the data table (c).
4. Click [Save](#) to save the changes then click [← Back](#) to close the *Data Table Editor* view and go back to the *Open Workbook in Design Mode*.

In the *Data Table Editor*, you can also:

- Rearrange, publish, delete, or create a duplicate of a data table
- Add a data table or select a data table template
- Add or manage data table parameters
- Group and sort columns
- Add, rearrange, or configure data sources
- Set row limits
- Configure columns settings

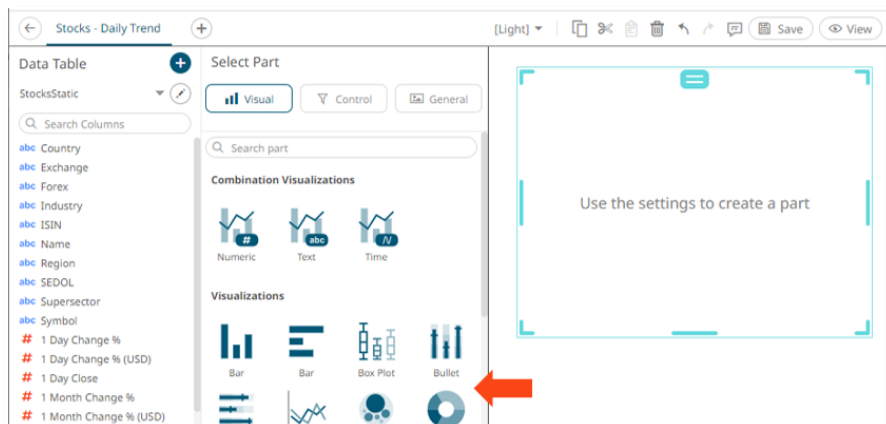
MORE INFORMATION HERE
[Online Help: Using the Data Table Editor View](#)

4 ADD A VISUALIZATION

On the *Open Workbook in Design Mode*:

1. Double-click or draw a rectangle on the dashboard canvas to create a visualization. A rectangle shape displays on the dashboard canvas with an instruction **Use the settings to create a part**.

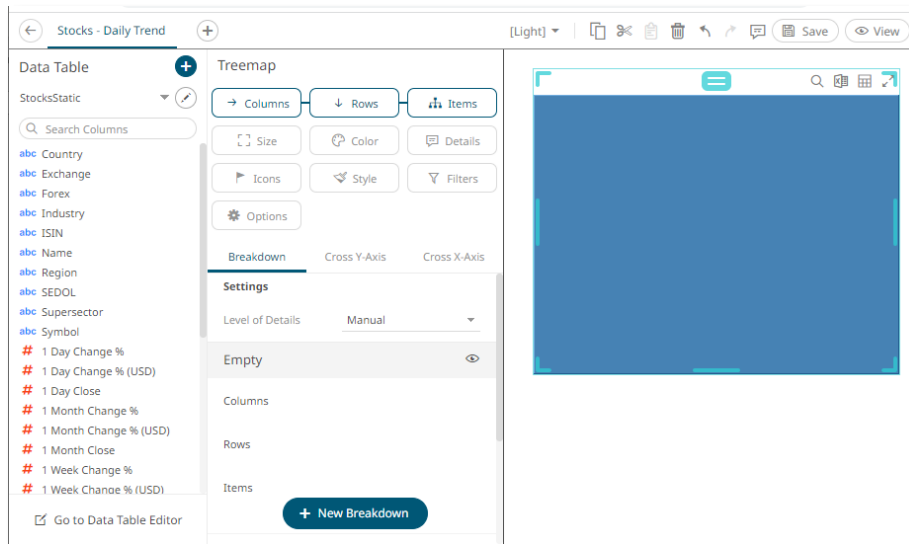
The *Select Part* panel displays with the available visualization parts.



Panopticon supports a wide range of information visualizations that are designed for fast comprehension and easy interpretation of static, time series, real time streaming, and historic data sets.

MORE INFORMATION HERE
[Reference Guide: Panopticon Visualizations](#)

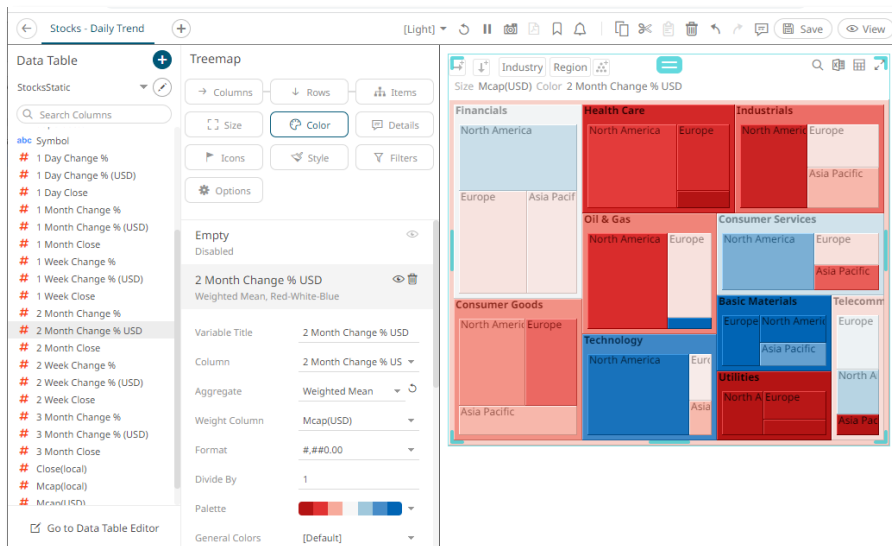
2. Select a visualization. You will see a skeleton image of the visualization on the dashboard canvas and the settings which are specific to its capabilities and functions on the *Visualization Settings* panel.



In the *Visualization Settings* panel, you can:


- Drag columns to the variables drop area
- Add filters
- Define the styling
- Define hierarchical structures called breakdowns
- Define the general and synchronizaiton settings
- Define the axes settings

3. Drag columns from the *Data Table* panel to the *Visualization Settings* panel to define the hierarchical breakdown and visualization variables.



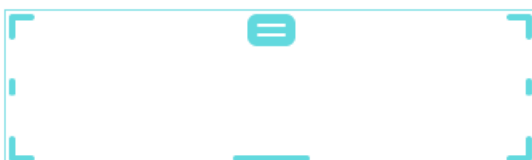
5 ENHANCE YOUR VISUALIZATION

ADD LEGENDS

1. Draw another rectangle on the dashboard canvas and click  then the **Color**

Legend  icon.

You will see a skeleton image of the legend.



Link legends to visualizations using drag and drop commands.

Four types of legend are supported: Timeseries, Color, Icon, and Shape.

MORE INFORMATION HERE
Online Help: [Adding Legends](#)



- In the *Color Legend Settings* panel, define the linked part and other settings.
The color legend displays with a line that connects to the linked visualization.



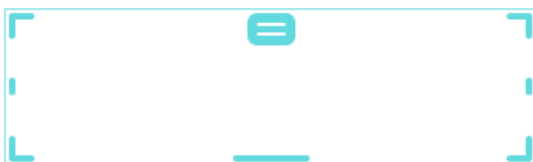
The Color Legend displays the color variables of the associated visualization. You can also set the orientation and style or enable the ability to do a filter or to display this part in the PDF output.

ADD FILTERS

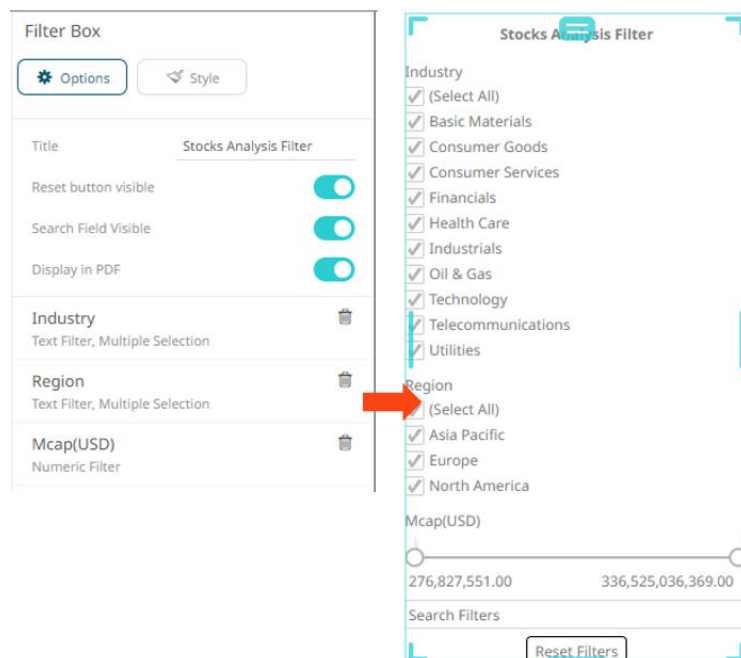
You can define a filter to a visualization based on a specific subset of the available data.

- Draw another rectangle on the dashboard canvas and click  then the **Filter Box**  icon.

You will see a skeleton image of the filter.

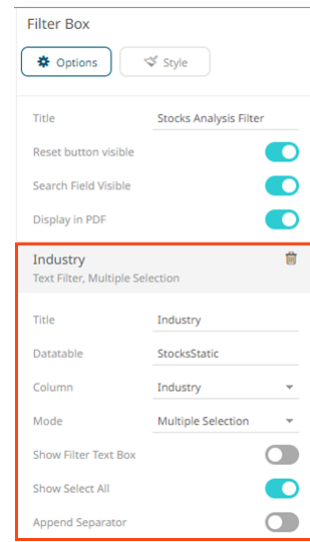


- In the *Filter Box Settings* panel, enter the *Title* and define the other settings. Then drag and drop text columns from the *Data Table* panel.



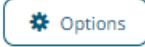
The filter type will automatically adjust, depending on the number of unique values.

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



6 DEFINE DASHBOARD AND WORKBOOK SETTINGS

1. On the *Dashboard and Workbook Settings* panel, select the **Workbook** tab then the **Options**



button.

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

Stocks - Daily Trend

Dashboard Workbook

⚡ Actions Theme 🗑️ Global Filter

⚙️ Options

Workbook

Min Width 300

Min Height 300

Max Width 0

Max Height 0

Show wait animation when reloading ☐

Thumbnail

Automatically update thumbnail ☒

External Image Choose file

Visualization

NaN Symbol

Double Click Drill

Selection in Popup ☒


Parameters

Assignment Scope Workbook Dashboard

Allow empty parameter value ☒

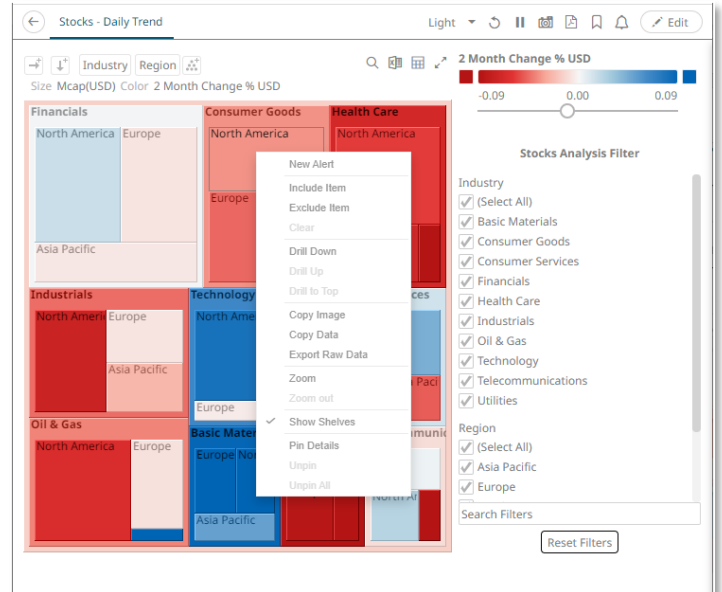
PDF Report

7 SAVE YOUR WORKBOOK

If you wish to save your workbook, click the **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](#)