

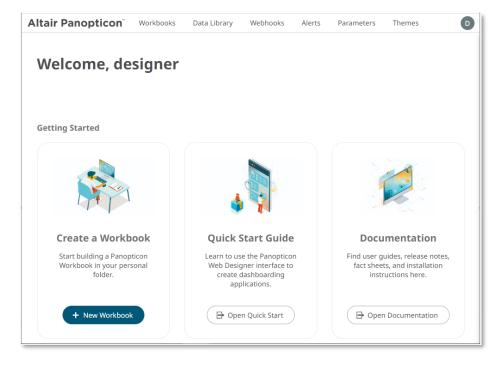
Altair Panopticon Web Authoring Quick Start

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
- Create a new workbook
- Access the Web Authoring Quick Start
- View online documentation and help



FROM DATA TO DASHBOARD IN 3 QUICK STEPS

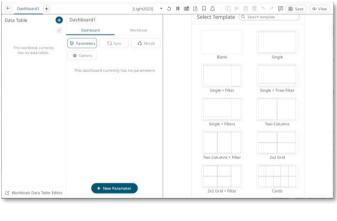
1 CREATE A WORKBOOK

On the Workbooks tab, select My Workspace folder then click



New Workbook		>
Retail Sales Performance		
	Create	el

This opens the Open Workbook in Design Mode.



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

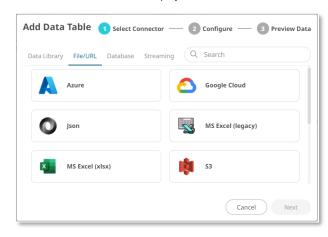


2 CONNECT TO DATA

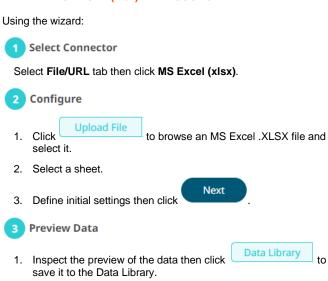


Ð

The Add Data Table wizard displays.

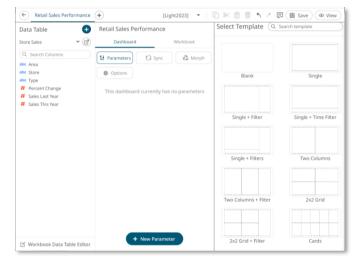


EXAMPLE: MS EXCEL (xlsx) DATA SOURCE

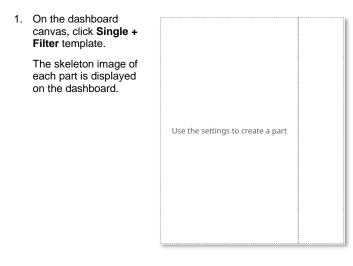




The data table is displayed in the Open Workbook in Design Mode.

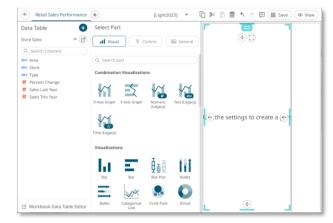


3 BUILD A VISUALIZATION



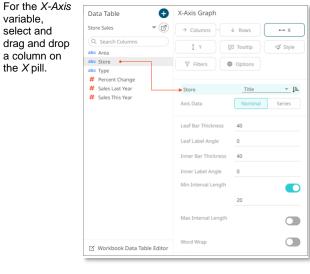
2. Select the left part to add and configure a visualization.

The skeleton image of the visualization is highlighted, and the *Select Part* pane displays with the available visualizations you can add.

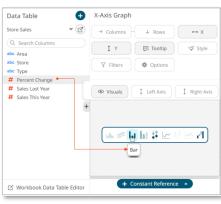


3. Select X-Axis Graph.

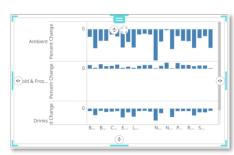
 Drag columns from the Data Table pane to the X-Graph Settings pane to define the hierarchical breakdown and visualization variables (e.g., Columns, Rows, X, Y).



For the *Y-axis* variable, select a column and drop it on the *Bar* graph visualization.

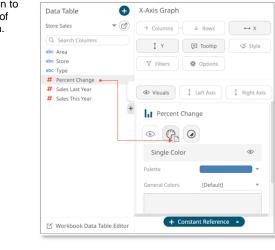


The *X-Axis Graph* displays on the dashboard.



3.1 ENHANCE YOUR VISUALIZATION

1. Drag a column to the *Color* pill of the *Bar* graph.



The color variable is applied to the visualization.

ld & Fr a na s Ea General Sync Options 2. Click and Title add Title Rows. Ŵ Retail Sales Performance with Crosstab Rows by Area Ŵ + Add Title Row

3.2 ADD COLOR LEGEND

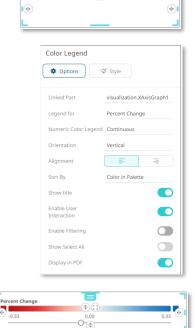
 Draw another rectangle on the dashboard canvas and
 Control

click then the Color Legend

icon.

You will see a skeleton image of the legend.

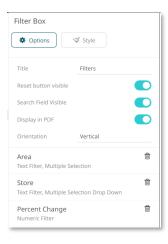
2. On the *Color Legend Settings* pane, define the linked part and other settings.



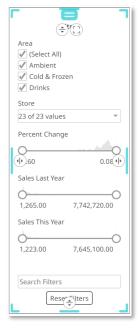
The color legend displays.

3.3 ADD FILTERS

- Click the right part to highlight. The *Filter Box Settings* pane is displayed.
- 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.



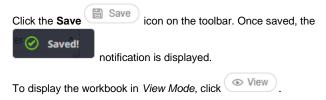
The filter type will automatically adjust, depending on the number of unique values.



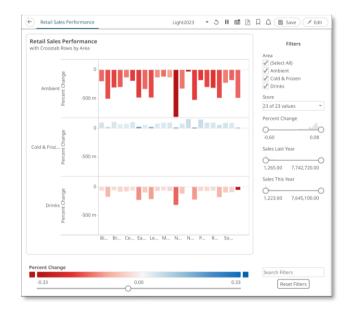
 Click on a filter column to expand and modify the settings as required.

Filter Box		
🏶 Options	🖇 Style	
Title	Filters	
Reset button visible		
Search Field Visible		
Display in PDF		
Orientation	Vertical	
Area Text Filter, Multiple Sele	ection	Ŵ
Title	Area	
Data Table	Store Sales	
Column	Area	Ψ
Mode	Multiple Selection	~
Show Filter Text Box		
Show Select All		
Append Separator		

3.4 SAVE YOUR WORKBOOK



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



LEARN MORE

DATA LIBRARY

The Data Library page allows creation and management of reusable data tables outside workbooks. Data tables from the Data Library can be used by multiple workbooks server wide.

Altair Panopticon [®] W	orkbooks Data	a Library Webhooks Alerts	Parameters Themes			
A Organization	Q Search	Data Table All	- ■ □ → ₽	s 🕯 🤇	+ New Legacy Extract	+ New Joined Data Table + New Data Tab
🔍 My Workspace		Name 个	Connector	Туре	Last Modified	Last Modified By
		BitCoinOrders	Text	Live	Mar 31, 2023 4:37 PM	designer
		StocksStatic	JDBC	Live	Mar 31, 2023 4:41 PM	designer
	×	Store Geography	MS Excel (xlsx)	Live	Mar 31, 2023 4:58 PM	designer
	× .	Store Sales	MS Excel (xlsx)	Live	Mar 31, 2023 4:57 PM	designer

REFINE YOUR DATA TABLE BY ADDING CALCULATED COLUMNS

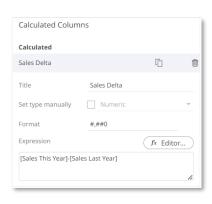
Click the .XLSX data table in the Data Library page to open it in the Data 1. Table Editor.

C)	Store Sales								Import	Data to St	orė	M Save
Dat	a Table Settin	gs		Calcul	ated Columns		Connector Settings	Transfor	m settings	Calumna	Ad	vanced
Conr	rector Name						Load Type	1	sad File	Link To F	11	
MS	Excel (xhx)		Change									_
Desc	ription						Excel File Path	Store_	Sales_2023-0	-31-14-4_	>	Browse
							Sheet	Sales				
			4				Headers On First R	Auto				
Aute	Refresh (s)	900					Columns					
Para	meters						Name		Туре	Date	e l	Enabled
							Store					
							Area				-	1993
							10.04					
							Туре					
	(+ P	arameter			+ New Col	umn •						
0	(+ P.		Column O	rder 50		umn +	Туре				-	
			Column Or	rder <mark>So</mark>	+ New Col		Type Sales This Year				sh Pre	Niew
	Search Column	ns			orted Original		Type Sales This Year				sh Pre	Niew (
1	Search Column	abe Store	abo Type	board	Pricent Change	# Sales Last Year	Type Sales This Year Pater Look Moon # Sales This Year				sh Pri	
#	Search Column nhs Area Ambient	abo Store Bristol	abo Type Store Cupt	board	Percent Change	# Sales Last Year 543,699.00	Type Sales This Year Pole for the Ware S50,697.00				sh Pre	view C
1 2	Search Column elsc Area Ambient Ambient	abo Store Bristol Bristol	abo Type Store Cupt Home Pro	board ducts	Pricent Change 0.01 0.01	# Sales Last Year 543,699.00 326,862.00	Type Sales This Year ************************************				sh Pre	I I I I I I I I I I I I I I I I I I I
1 2 3 4	Search Column nbc Area Ambient Ambient Ambient	abo Store Bristol Bristol Bristol	abu Type Store Cupt Home Prov Savoury	board ducts	Percent Change 0.01 0.01 0.02	# Sales Last Year 543,699.00 326,862.00 66,413.00	Type Sales This Year 550,697.00 323,094.00 67,702.00				sh Pro	
1 2 3 4 5	Search Column alse Area Ambient Ambient Ambient	abo Store Bristol Bristol Bristol Bristol	abo Type Store Cupi Home Pro Savoury Confection	board ducts hany	Original # Percent Change 0.01 0.01 0.02 0.19	# Sales Last Year 543,699.00 326,862.00 66,413.00 40,890.00	Type Sales This Year File Lead Lead S50,077.00 323,094.00 67,702.00 33,219.00				sh Pro	view (
1 2 3 4 5 6	Search Column nht Area Ambient Ambient Ambient Ambient	abo Store Bristol Bristol Bristol Bristol Bristol	abo Type Store Cupl Home Pro Savoury Confection Nuts	board ducts hany	Original Percent Change 0.01 -0.01 0.02 -0.19 0.03	# Sales Last Year 543,699.00 326,862.00 66,413.00 40,890.00 695,196.00	Type Sales This Year 550,697.00 1323,094.00 67,702.00 132,19.00 712,467.00				sh Pro	Niew)
# 1 2 3	Search Column nht Area Ambient Ambient Ambient Ambient Drinks	abo Store Bristol Bristol Bristol Bristol Bristol Bristol	abo Type Store Cupl Home Pro Savoury Confection Nuts Soft Drinke	board ducts hany	Original Percent Change 0.01 0.01 0.02 0.19 0.03 0.05	# Sales Last Year 543,699.00 326,862.00 66,413.00 40,890.00 695,196.00 59,209.00	Type Sales This Year S50,697.00 122,094.00 67,702.00 13,219.00 712,467.00 56,493.00				sh Pro	Niew)



+ New Column 🔺

On the Calculated 3. Columns pane, enter the title and the settings of the calculated column.



Save Click

4.

. The new calculated column is added and displayed in the Data Preview pane.

JOIN DATA TABLES

Create	and clicł	K		ata Table			
The Join Data 7	Workbooks		splaye		Parameters Them	25	
RetailPerformanceJoin Data Table Settings Description		ulated Columns			Join Settings	Transform settings	Advance
Auto Refresh (s) 900 Parameters (+ Parameter		(+ N	iew Column			+ Add Data Table	
Q Search Columns Preview Not Available	Column Order	Sorted Original					tefresh F

3. Click + Add Data Table . Then select the data tables to join.

	Name 个	Connector	Туре	Last Modified	Last Modified By
7637	BitCoinOrders	Text	Live	Mar 31, 2023 4:37 PM	designer
•	StocksStatic	JDBC	Live	Mar 31, 2023 4:41 PM	designer
×	Store Geography	MS Excel (xlsx)	Live	Mar 31, 2023 4:58 PM	designer
×	Store Sales	MS Excel (xlsx)	Live	Mar 31, 2023 4:57 PM	designer
					Close

4. To join the data tables, click the **Join** $\overset{(\ensuremath{\varnothing})}{=}$ icon.

The Join Key will be the text column name that is found in both datasets.

Store Geography MS Excel (xlsx)	۵				
Store Sales MS Excel (xisx)	Û	Left Column		Right Column	
		Store	~	Store	~ 1
+ Add Data Table			+ Jo	in Key	

5. Click Library page.

D

Bave . The joined data table is added in the Data

Q Sea	rch Data Table All	- 11 0 0	-8-51 11	+ New Legacy Extract	+ New Joined Data Tab
	Name 🕆	Connector	Туре	Last Modified	Last Modified By
	BitCoinOrders	Text	Live	Mar 31, 2023 4:37 PM	designer
	RetailPerformanceJoin	Multiple	Joined	Mar 31, 2023 5:38 PM	designer
	StocksStatic	JDBC	Live	Mar 31, 2023 4:41 PM	designer
	Store Geography	MS Excel (xisx)	Live	Mar 31, 2023 4:58 PM	designer
	Store Sales	MS Excel (xisx)	Live	Mar 31, 2023 4:57 PM	designer

ORGANIZE YOUR CONTENT

You can share workbooks and data tables, and restrict access, by making Permissions settings on each folder on the server. Permission settings on a folder apply the same to all workbooks and all data tables placed in that folder.

For Workbooks:

For Data Tables:

Altair Panopticon Workbooks	Altair Panopticon Workbooks	Data Library
# Organization Q s	A Organization	Search Data Table
	My Workspace	_
C Rename	🗹 Rename	Name ↑
E New Folder	+ New Folder	
+ New Workbook	New Data Table	BondStat
Upload Workbook	New Joined Data Ta	
♀ Permissions /ec		BPOilSpil
Export Bundle	Export Bundle	EquityPo
Import Bundle	F Import Bundle	g Lquicyro
Remove	Till Remove	StocksJoi

- 1. Right-click on your personal folder and select **Permissions** in the context menu.
- 2. Click ⁺ beside the *Allowed* section. Select a *Group* that will be granted permission.

Permissions for 'My Workspace'		\times
Allowed +	Read Write Modify	
O designer	©-©-©	Ŵ
Denied +		
Apply permissions to subfolders		
	Update Cancel	\supset

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

Permis Allowed	ssions for	'My Work		Read	Write	Modify)
⊘ d	lesigner			0-	-0-	-0	ť
, ⊂ F	inancials			0-	-0-	-0	ť
Denied	+						
Appl	y permissio	ns to subfo	lders				
				Up	date	Cance	1

NEXT STEPS

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

- Panopticon Web Authoring Guide
- Analyst Guide
- Visualization Guide