

**Altair Panopticon™ v2023.0**  
**ANALYST CLIENT USER GUIDE**

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# [1] ALTAIR PANOPTICON WORKBOOKS

## THE WELCOME PAGE

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.

**Altair Panopticon** Workbooks Webhooks Alerts

### Welcome, viewer

**Recent Workbooks**

**Order Book**  
Viewed a few seconds ago

**How to Drill**  
Viewed 6 months ago

**Getting Started**

**Explore**  
Panopticon lets you organize your workbooks and data in folders. Click to explore all the content available within your organization.  
[Explore Workbooks](#)

**Quick Start**  
Get familiar with concepts and features of the Panopticon web client in just a few minutes.  
[Open Quick Start](#)

**Documentation**  
Find user guides, release notes, fact sheets, and installation instructions here.  
[Open Documentation](#)

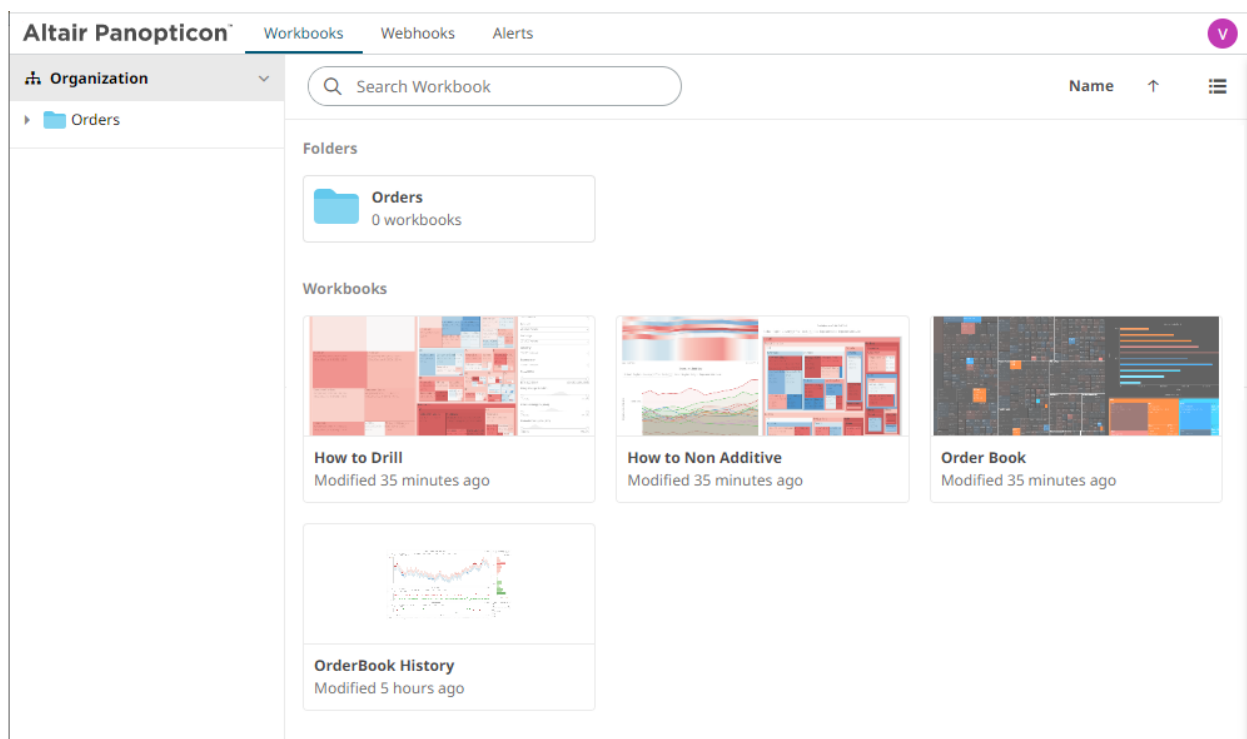
From this page you can:

- ❑ Open recently viewed workbooks (if available)
- ❑ [Explore workbooks available in your organization](#)
- ❑ [Open the Analyst User Guide](#)
- ❑ [View online documentation and help](#)

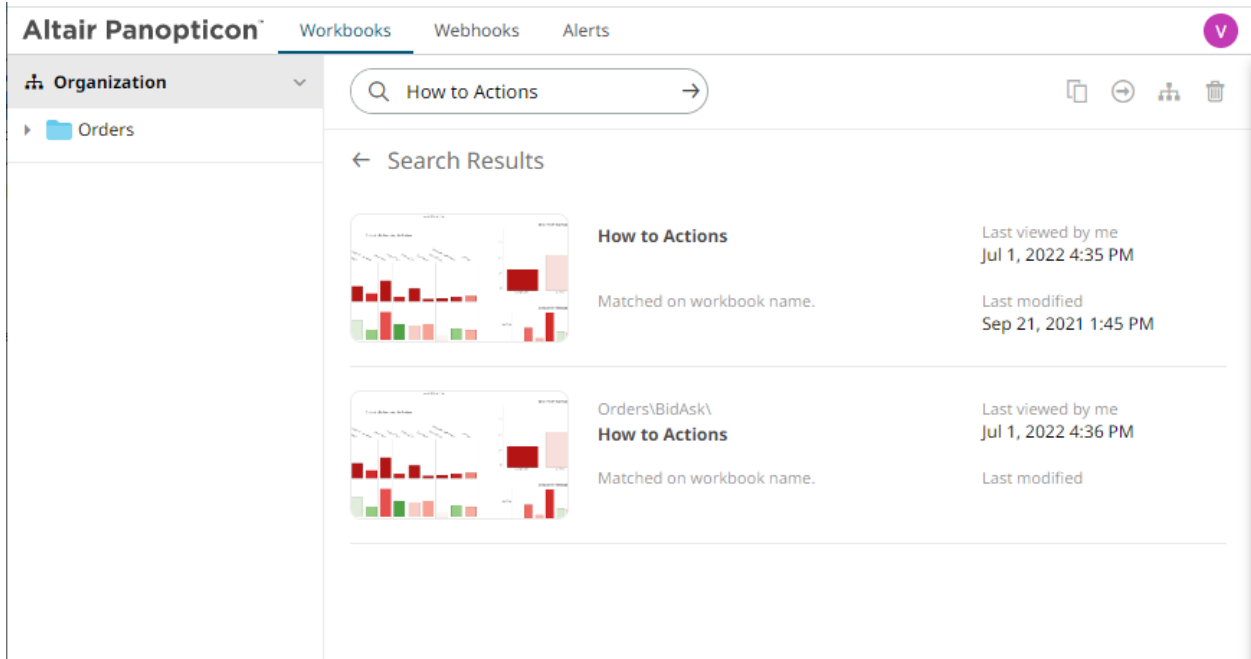
## ACCESSING WORKBOOKS

The **Workbooks** page lists available folders and uploaded or published workbooks in *Grid View*.

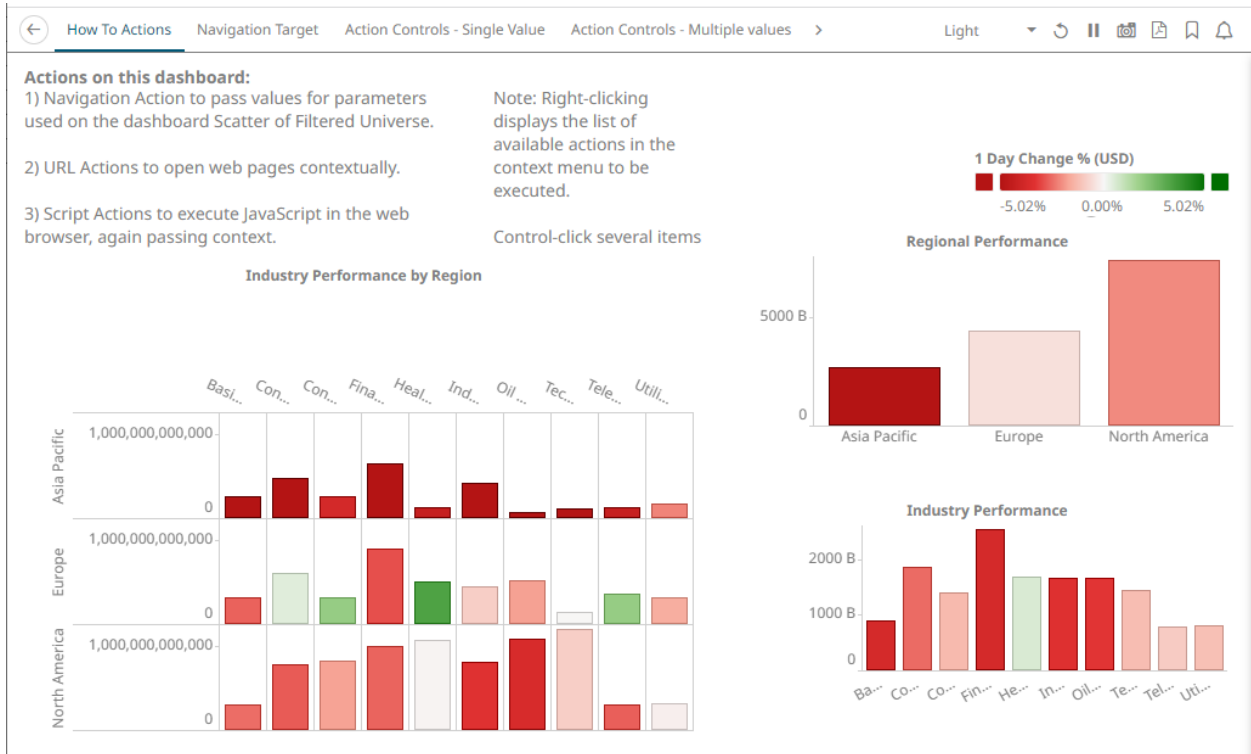
- ❑ The *Folders* include their names and the number of available workbooks.
- ❑ The *Workbooks* include their titles, thumbnail images, and when they were last updated.




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

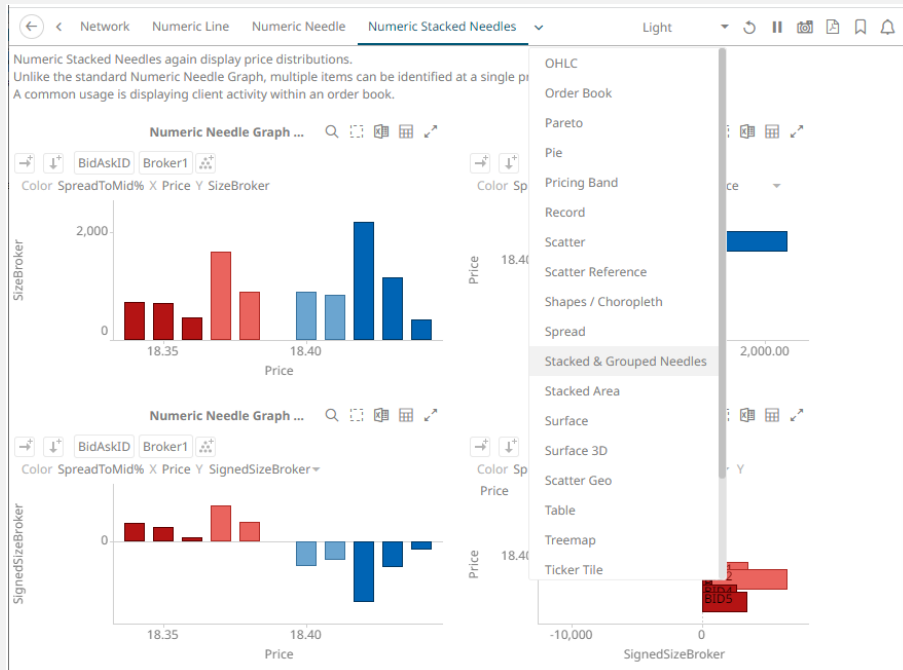


Clicking on the workbook thumbnail opens it on the *Open Workbook in View Mode*:



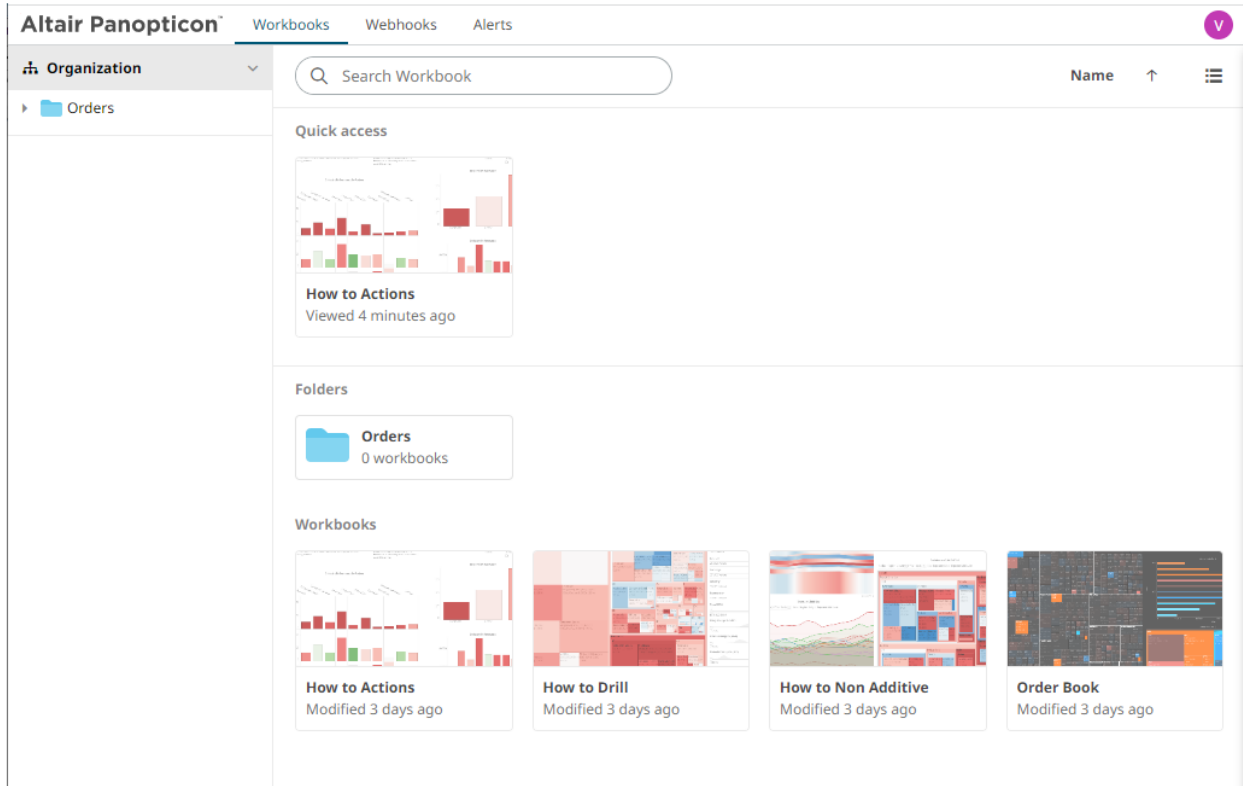
**NOTE**

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* panel.



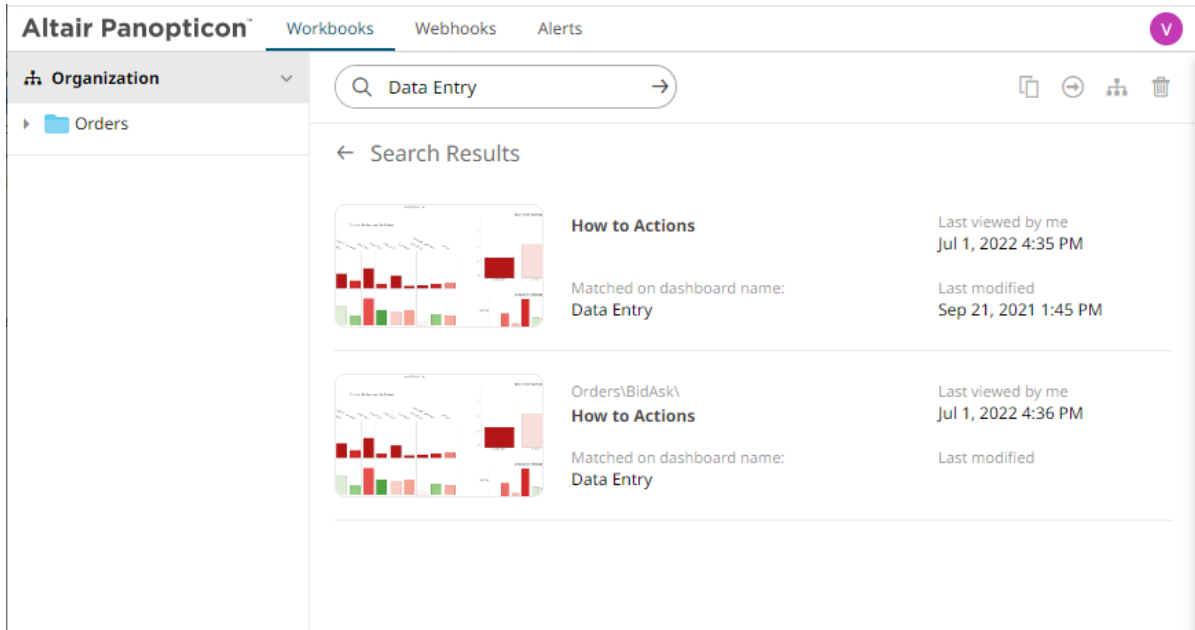


## SEARCHING FOR WORKBOOKS

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

### Steps:

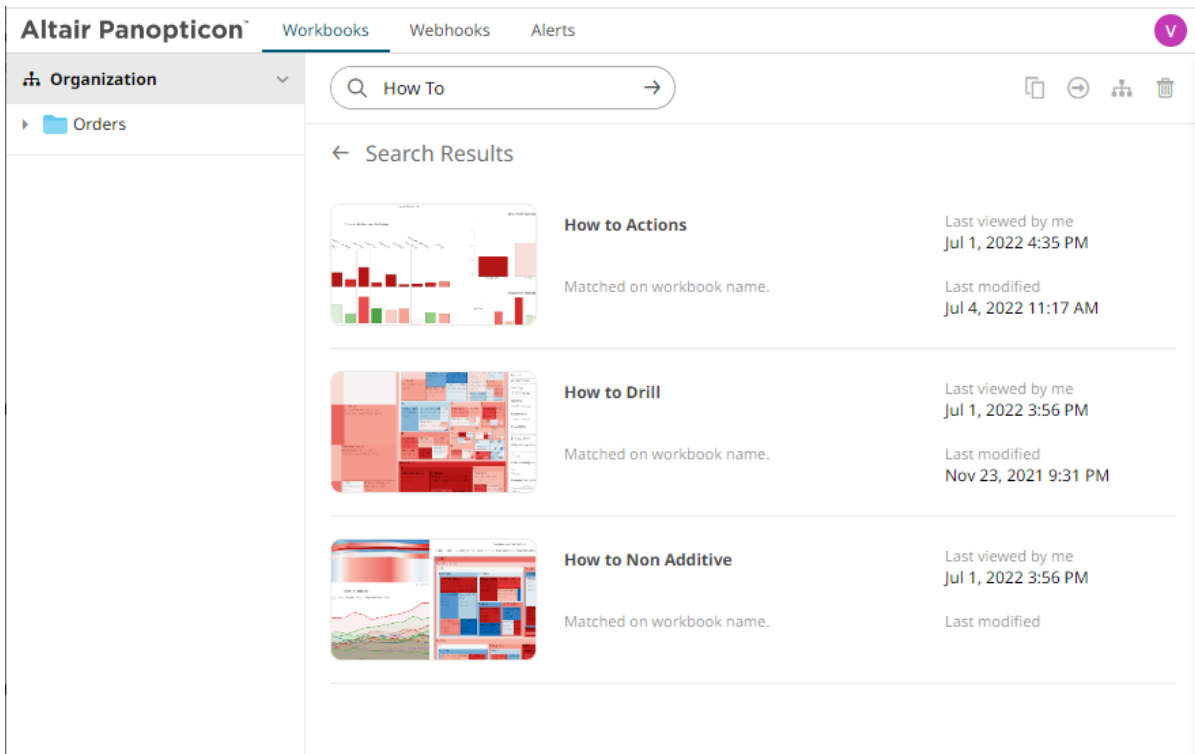
1. On the *Workbooks and Folders Summary* layout, click on a workbook folder then enter a workbook name or dashboard name in the *Search Workbook* box.
2. Click → .



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.




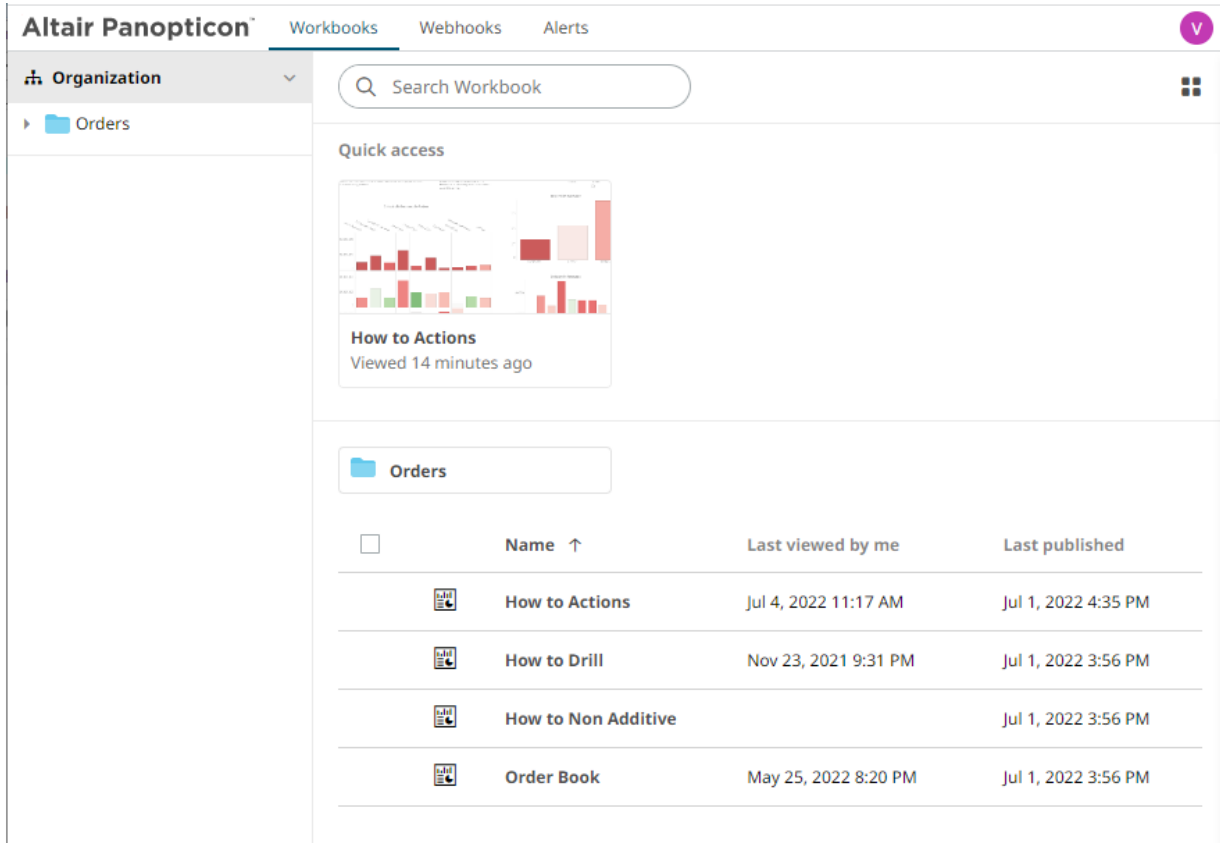
Click on a workbook thumbnail to open and display it on the web browser.

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*.

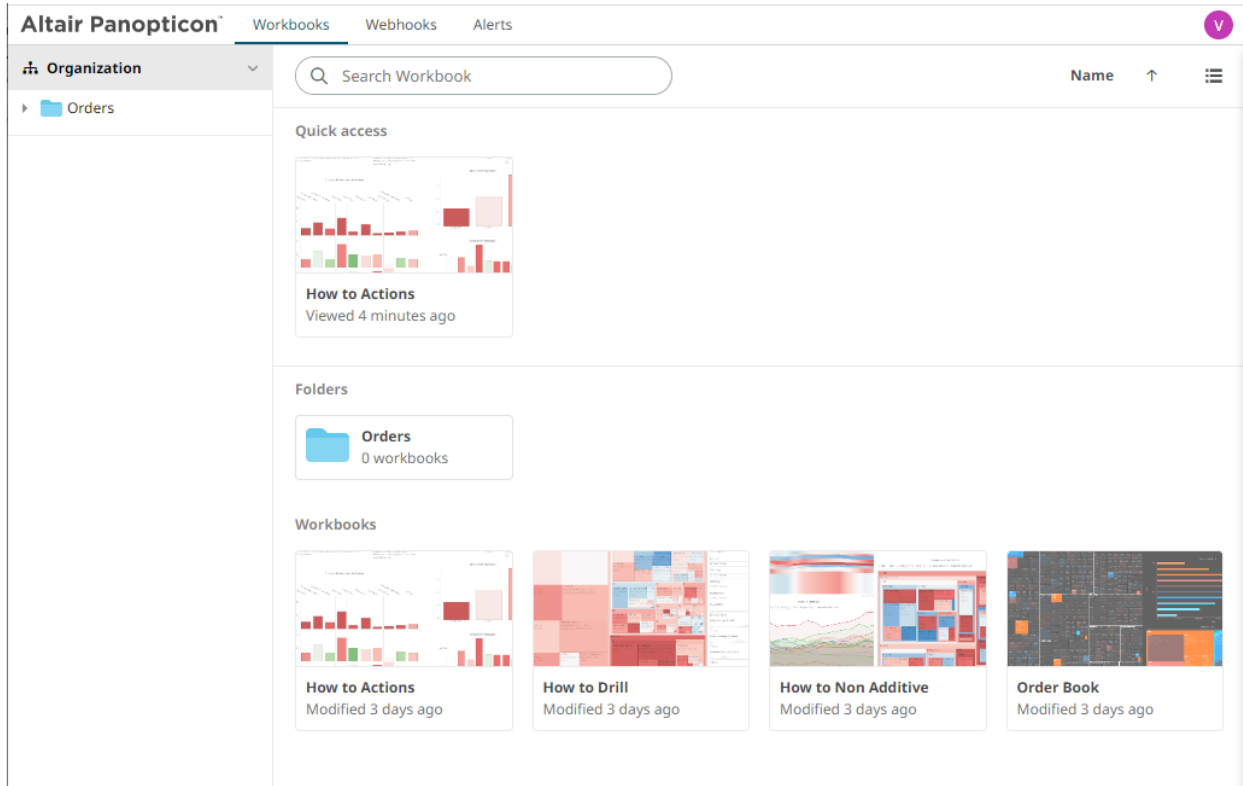
On the *Toolbar*, click **List View**  , the folders and workbooks are displayed in a standard listing.



The screenshot shows the Altair Panopticon interface in the 'Workbooks' view. The top navigation bar includes 'Altair Panopticon', 'Workbooks', 'Webhooks', and 'Alerts'. A search bar labeled 'Search Workbook' is present. The left sidebar shows the 'Organization' and 'Orders' folder. The main content area features a 'Quick access' section with a chart and a 'How to Actions' document. Below this is a table listing workbooks under the 'Orders' folder.

<input type="checkbox"/>	Name ↑	Last viewed by me	Last published
<input type="checkbox"/>	 How to Actions	Jul 4, 2022 11:17 AM	Jul 1, 2022 4:35 PM
<input type="checkbox"/>	 How to Drill	Nov 23, 2021 9:31 PM	Jul 1, 2022 3:56 PM
<input type="checkbox"/>	 How to Non Additive		Jul 1, 2022 3:56 PM
<input type="checkbox"/>	 Order Book	May 25, 2022 8:20 PM	Jul 1, 2022 3:56 PM

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

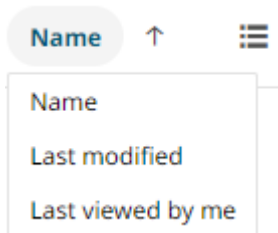
Sorting workbooks can be done by *Name*, *Last Viewed/Last Published*, or *Last Viewed by Me*.

### 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**.

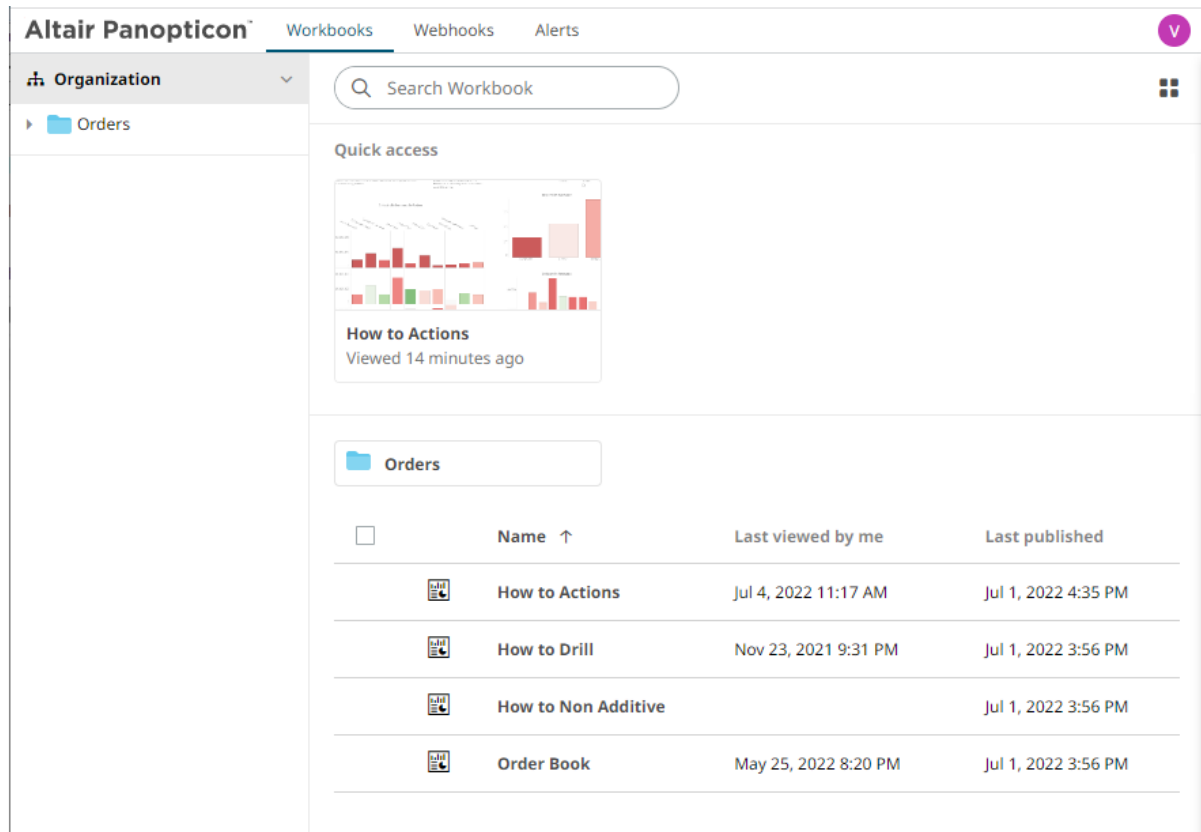


- Name
- Last Modified
- Last Viewed By Me





Then click the *Sort Order*.

-  Ascending
-  Descending



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



The screenshot shows the Altair Panopticon interface. At the top, there are tabs for 'Workbooks', 'Webhooks', and 'Alerts'. Below the navigation bar, there is a search bar labeled 'Search Workbook' and a sidebar showing the 'Organization' structure with a folder named 'Orders'. The main content area features a 'Quick access' section with a chart and a 'How to Actions' card. Below this is a table listing workbooks under the 'Orders' folder. The table has columns for 'Name', 'Last viewed by me', and 'Last published'. The 'Name' column header is highlighted with an upward arrow, indicating ascending sort order.

<input type="checkbox"/>	Name ↑	Last viewed by me	Last published
	How to Actions	Jul 4, 2022 11:17 AM	Jul 1, 2022 4:35 PM
	How to Drill	Nov 23, 2021 9:31 PM	Jul 1, 2022 3:56 PM
	How to Non Additive		Jul 1, 2022 3:56 PM
	Order Book	May 25, 2022 8:20 PM	Jul 1, 2022 3:56 PM

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.

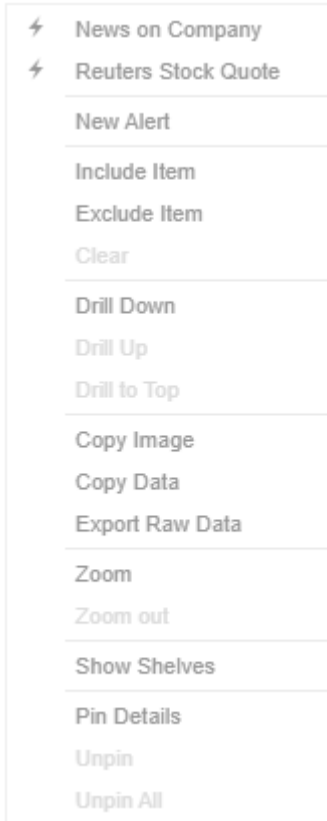
The screenshot illustrates the Altair Panopticon interface with several key components labeled:

- Workbook Tabs:** Located at the top, showing tabs for 'Introduction', 'Layout with panels', and 'Layout without panels'.
- Workbook Theme:** A dropdown menu currently set to 'Light'.
- Toolbar:** Contains icons for refresh, pause, zoom, print, and notifications.
- Back to Workbooks and Folders Page:** A button on the left side.
- Hierarchy Pivot Point (Rows/Columns):** A control for navigating through data hierarchies.
- Visualizations and Parts:** The main area containing:
  - A grid of industry categories (Financials, Health Care, Oil & Gas, Technology, Consumer Goods, Industrial, Consumer Services, Basic Materials, Telecommunications, Utilities).
  - A horizontal bar chart for 'Mcap(USD)'.
  - A donut chart.
  - A scatter plot for '1 Month Change %'.
  - A heatmap for 'Erste Group Bank AG' with a context menu open over it. The menu options include: New Alert, Include Item, Exclude Item, Clear, Drill Down, Drill Up, Drill to Top, Copy Image, Copy Data, Zoom, Zoom out, Show Shelves, Pin Details, Unpin, and Unpin All.
  - A table titled 'Performance by Company' with columns: Symbol, Name, Forex, Close(local), Mcap(local), Mcap(USD), and 1 Day Change.
  - A table with columns: Symbol, Name, Forex, Close(local), Mcap(local), Mcap(USD), 1 Day Change, 1 Week Change % (USD), 1 Month Change % (USD), and 3 Month Change % (USD).
- Filter:** A vertical sidebar on the right with sections for Region (Asia Pacific, Europe, North America), Country, Industry, Supersector, and Mcap(USD) with a slider.
- Show Details:** A button to expand data points.
- Context Menu:** A button to interact with specific data points.

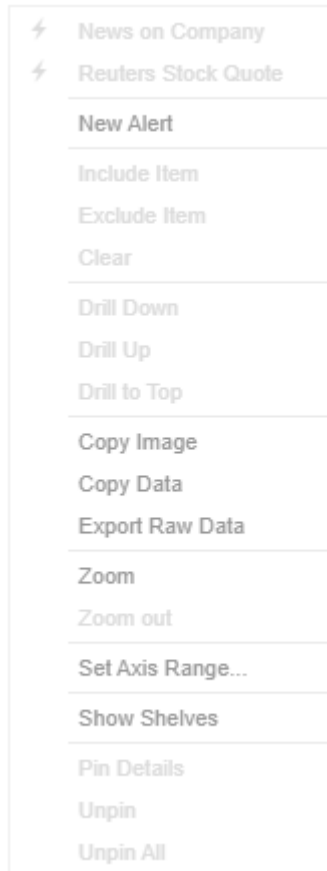
Users can interact with the workbook using the visualization right-click [context menu](#), [header controls](#), shelves, variables and cross tab options.

## Context Menu

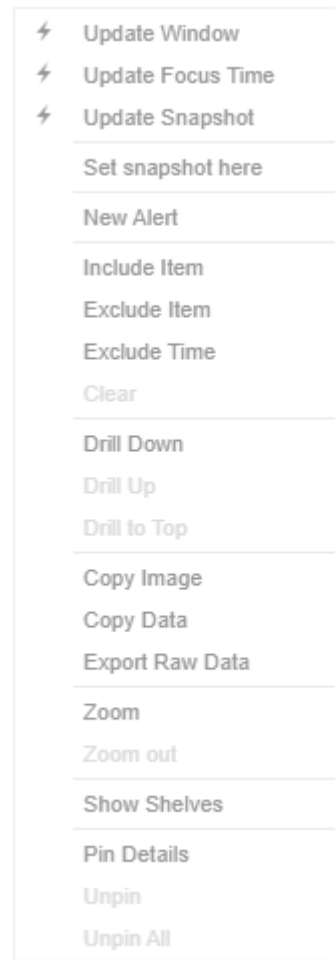
The visualizations in a workbook provide the following right-click menu options:



Visualization Context Menu



Visualization Context Menu of the Numeric Axis



Time Series Visualization Context Menu of the Time Axis

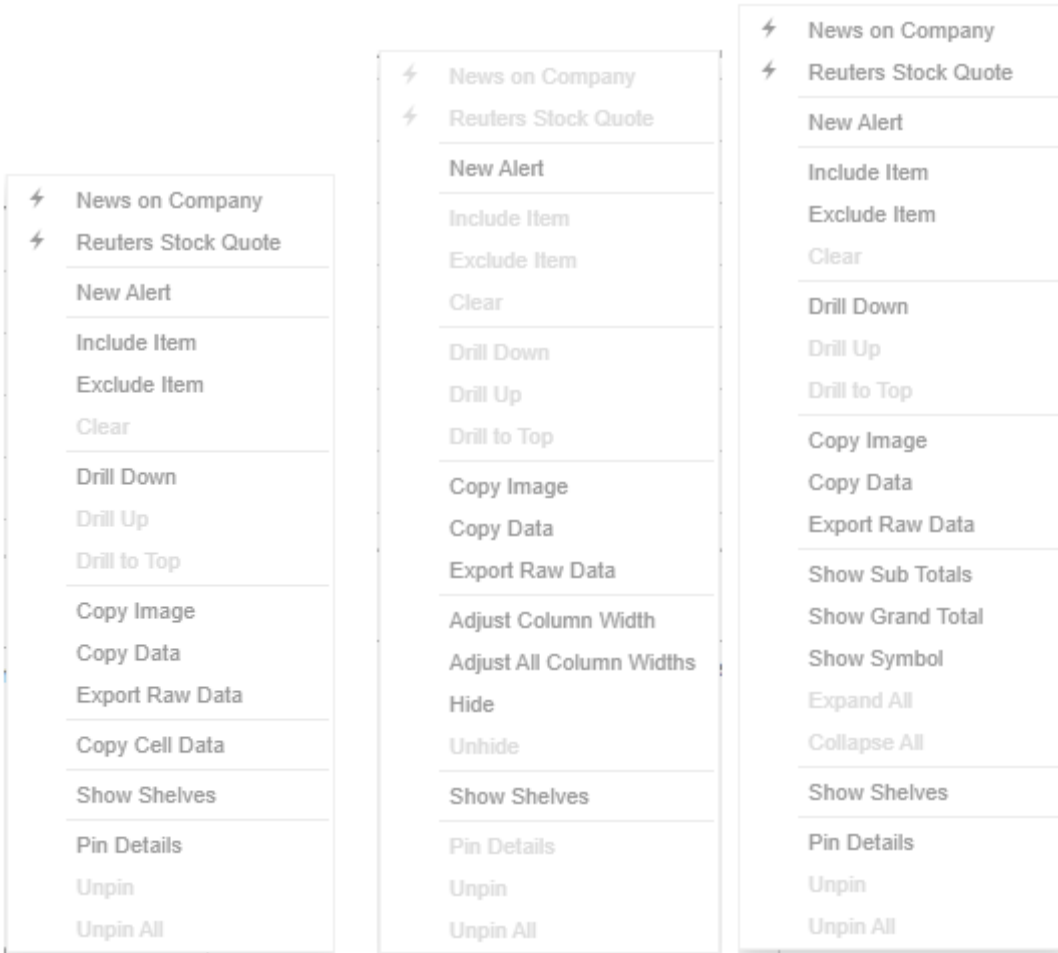


Table visualization context menus depending on where you click on the visualization

Context Menu	Description
<a href="#">Automatic Parameterization</a>	Run an automatic parameterization.
<a href="#">Actions</a>	Run a workbook action on the visualization.
New Alert	Create an <a href="#">alert</a> .
<a href="#">Visualization Filtering</a>	Allows visualization filtering. Options include: <ul style="list-style-type: none"> <li>Filter Include</li> <li>Filter Exclude</li> <li>Filter Clear</li> </ul>
<a href="#">Drilling</a>	Allows drilling into visualizations. Options include: <ul style="list-style-type: none"> <li>Drill Down</li> <li>Drill Up</li> <li>Drill to Top</li> </ul>
<a href="#">Data Export</a>	Allows exporting of data. Options include: <ul style="list-style-type: none"> <li>Copy Image</li> </ul>



	<ul style="list-style-type: none"> <li>• Copy Data</li> <li>• Export Raw Data</li> <li>• Copy Cell Data</li> </ul>
<a href="#">Zooming</a>	Allows zooming in and out of visualization sections.
<a href="#">Show Shelves</a>	Allows cross tab, breakdown, and variable shelves to be displayed.
<a href="#">Pinning</a>	Allows pinning of the <i>Details</i> pop-up. Options include: <ul style="list-style-type: none"> <li>• Pin Details</li> <li>• Unpin</li> <li>• Unpin All</li> </ul>

The additional time series visualization context menu options include:

Setting	Description						
<a href="#">Set Snapshot Here</a>	Available in the time series visualization context menu when the Snapshot Grid Line is rendered or set to <b>Dotted</b> , <b>Dashed</b> , or <b>Solid</b> in the Time Axis variable.						
Set Axis Range	<p>Allows setting of the time axis range:</p> <div data-bbox="565 871 1144 1041" data-label="Form"> <table border="1"> <tr> <td>Min Range</td> <td>minutes</td> <td>0</td> </tr> <tr> <td>Increment Step</td> <td>minutes</td> <td>0</td> </tr> </table> </div> <ul style="list-style-type: none"> <li>• <b>Min Range</b> The minimum time axis range. Supported units are milliseconds, seconds, minutes, hours, days, months, quarters, and years.</li> <li>• <b>Increment Step</b> 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.</li> </ul>	Min Range	minutes	0	Increment Step	minutes	0
Min Range	minutes	0					
Increment Step	minutes	0					

The additional Table visualization context menu options include:

Context Menu	Description
<a href="#">Adjust Columns</a>	Adjust column width in the table visualization.
<a href="#">Hide / Unhide Columns</a>	Hide or display columns in the table visualization.
<a href="#">Show Hierarchy Column</a>	Display the hierarchy column.
<a href="#">Expand / Collapse Hierarchy</a>	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.

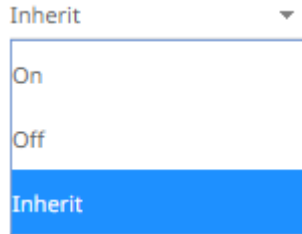
Show <Column>

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.

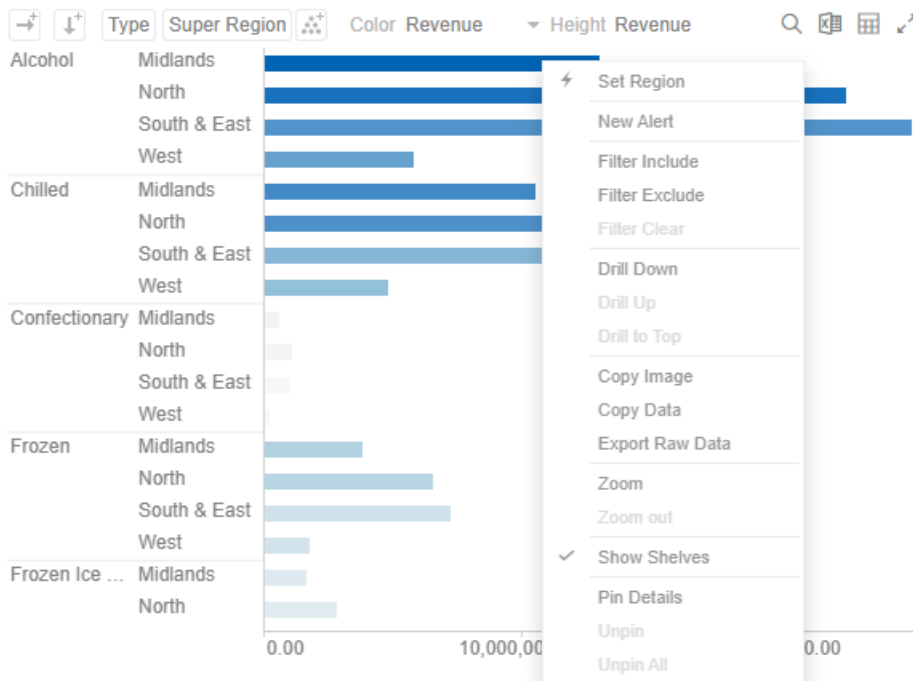


### On

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:

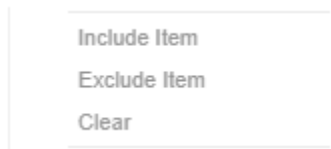
- Default values on the creation of the parameter in the data table
- Values specified as a result of right-clicking on an item and executing an action
- Values specified externally, when a workbook is accessed via the web browser, and the parent web page includes the specified values as inputs
- In 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:

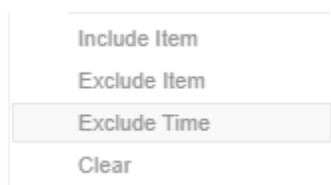


- Include Item** filters the dashboard to include the selected items.
- Exclude Item** filters the dashboard to exclude the selected items.
- Clear** removes any visualization filters.





### 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.

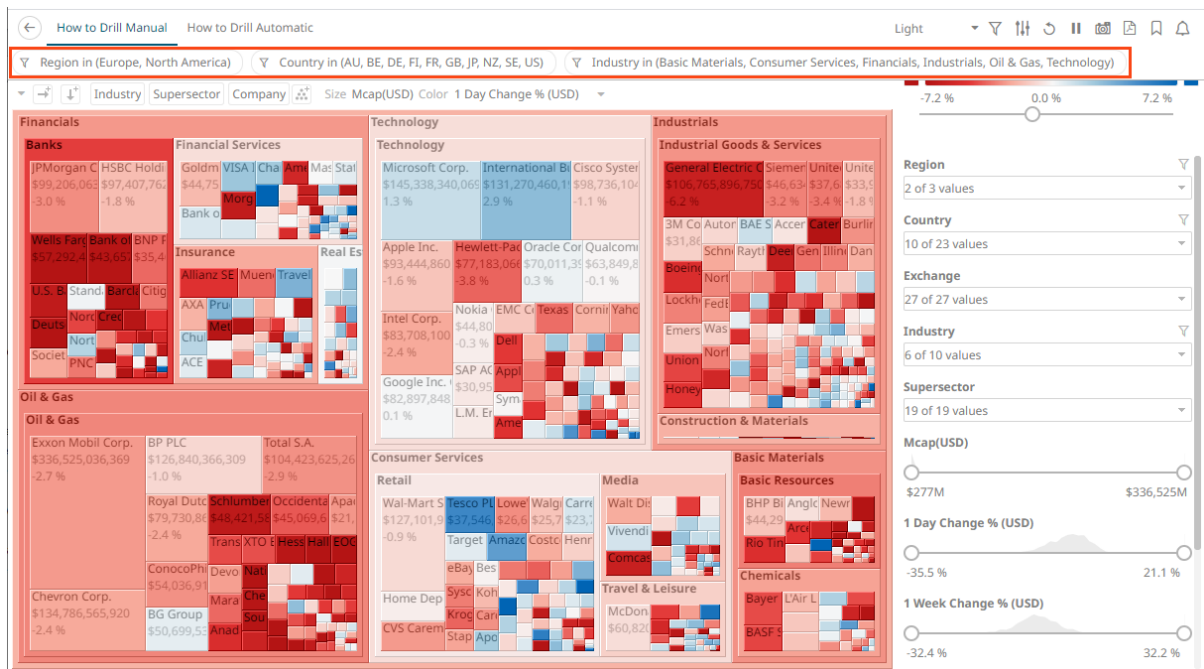
These filters can be done through:

- 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 over any predicate to display its details.

#### Predicate 1:

 Region in (Europe, North America)

Full Predicate: Region in (Europe, North America)  
 Applies to: Portfolio Performance Map  
 Generated by: TextFilter for Region in

#### Predicate 2:

 Country in (AU, BE, DE, FI, FR, GB, JP, NZ, SE, US)


Full Predicate: Country in (AU, BE, DE, FI, FR, GB, JP, NZ, SE, US)  
 Applies to: Portfolio Performance Map  
 Generated by: TextFilter for Country in

### Predicate 3:

Industry in (Basic Materials, Consumer Services, Financials, Industrials, Oil & Gas, Technology)

Full Predicate: Industry in (Basic Materials, Consumer Services, Financials, Industrials, Oil & Gas, Technology)  
Applies to: Portfolio Performance Map  
Generated by: TextFilter for Industry in

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

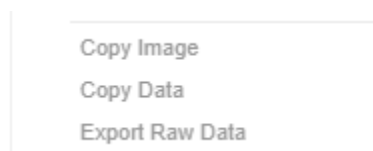
- Drill Up – Enabled when the lower level of the selected item is displayed. Click to drill to the upper level.
- Drill to Top – Drills to the top level of the selected value.

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

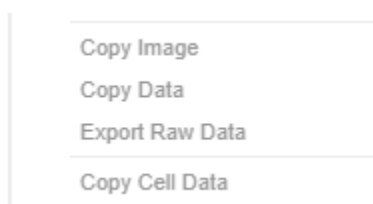
## Data Export

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.



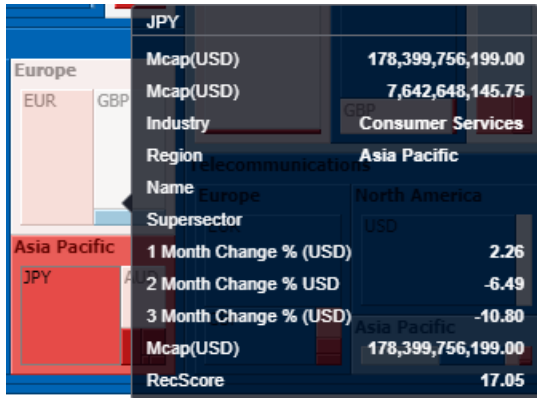
The data exported will be what appears on screen, or in a linked table. Specifically, all the columns that appear in the Detail pop-up, including:

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

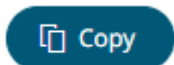
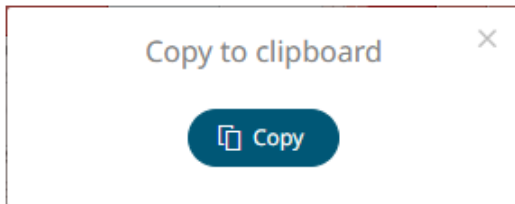
	1 Day Change ...	1 Month Chang...	1 Week Change...	Mcap(USD)	RecScore	Target
<input type="checkbox"/> 3i Group PLC Financials	0.04	0.35	0.01	1,488,911,563.00	0.42	12.00
<input type="checkbox"/> 3M Co. Industrials	-0.01	0.07	0.01	31,869,237,156.00	0.25	12.00
<input type="checkbox"/> 77 Bank Ltd. Financials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

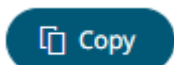
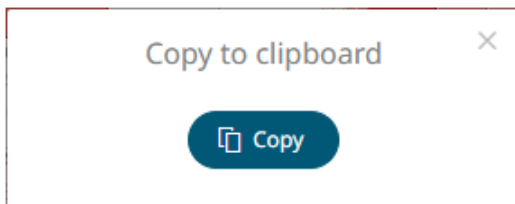


Click **Copy** to copy and paste the data to another application such as MS Excel.

	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.

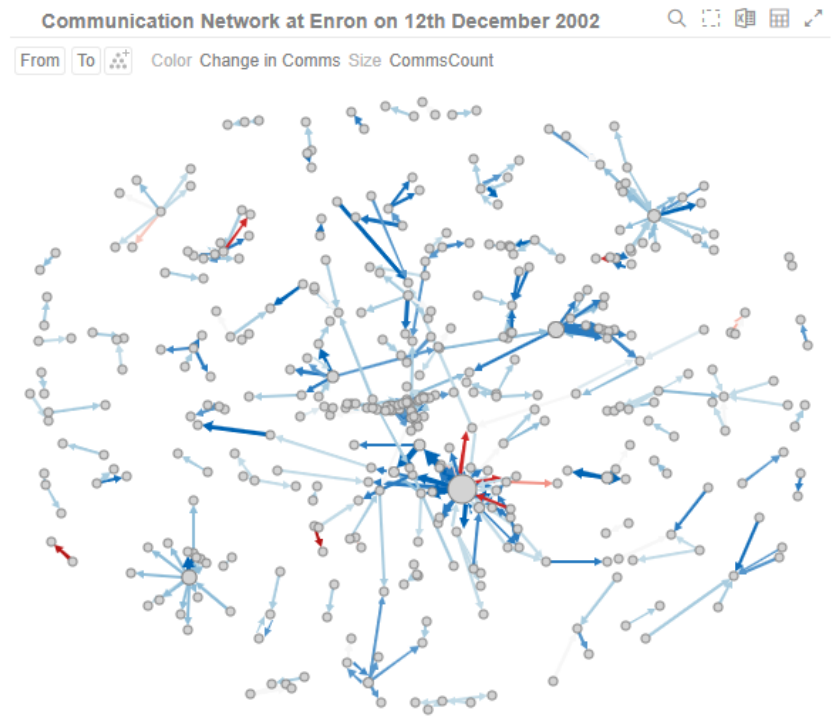


Click **Copy** to copy and paste the whole dashboard image to another application.



### 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**

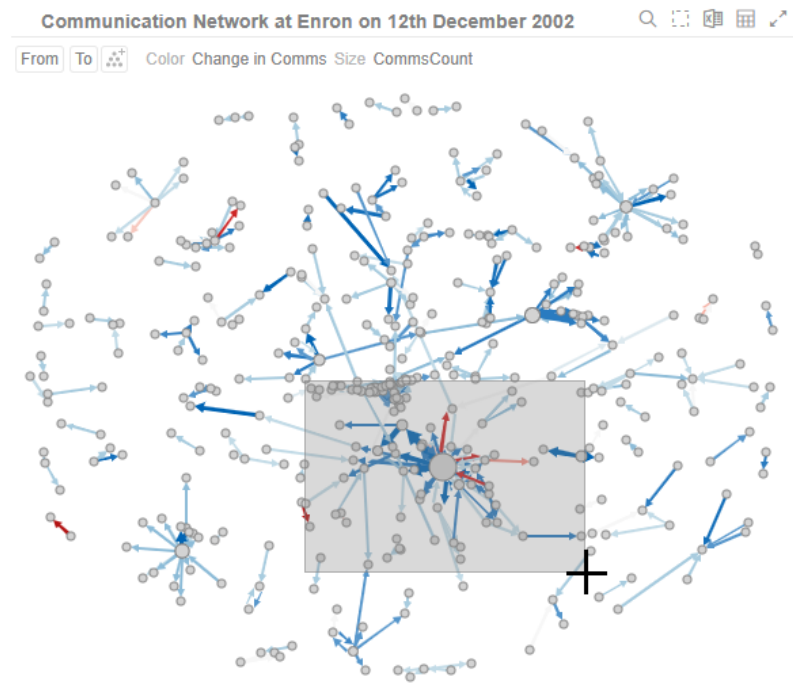


Before selection

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

**During**

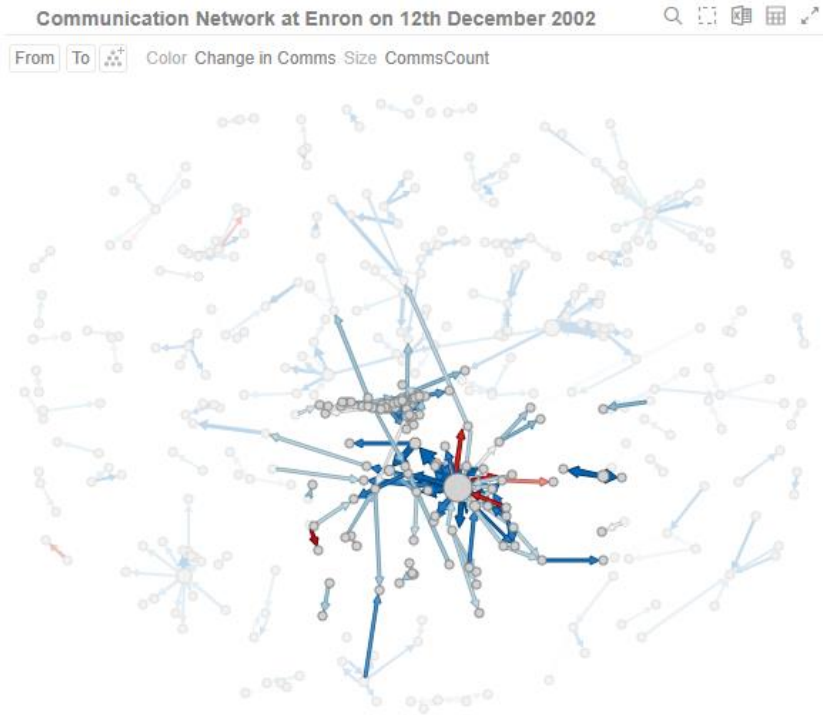
Mouse pointer has been dragged to define an area of interest.



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:

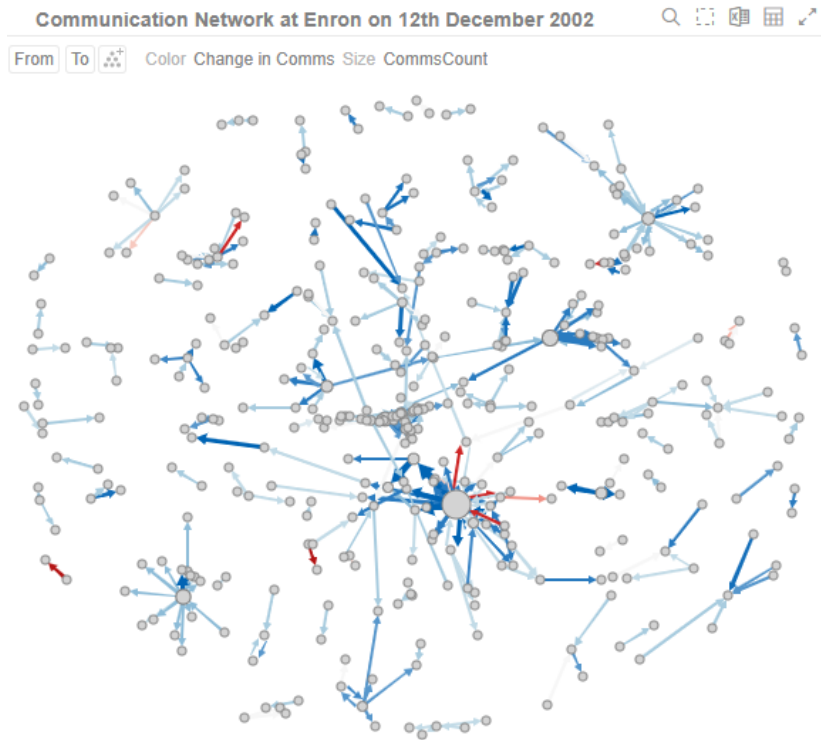
- Numeric X and Y axes
- Date/Time X and Y axes

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.

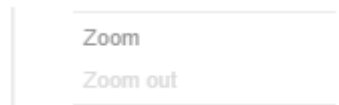
## Before




Before zooming

You can either:

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

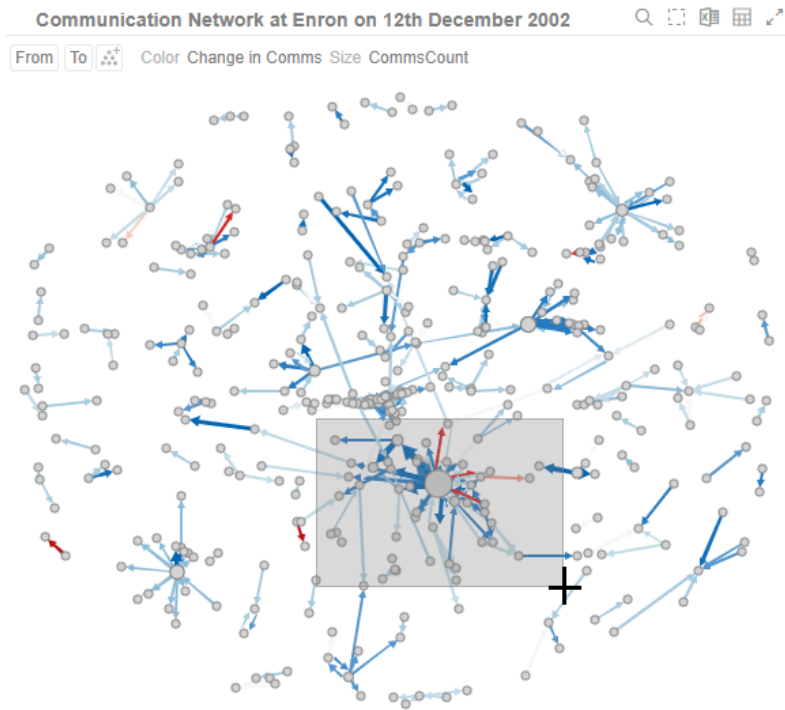


- click the **Rubber Band Zoom**  icon on the header control

The mouse turns into a crosshair .

### During

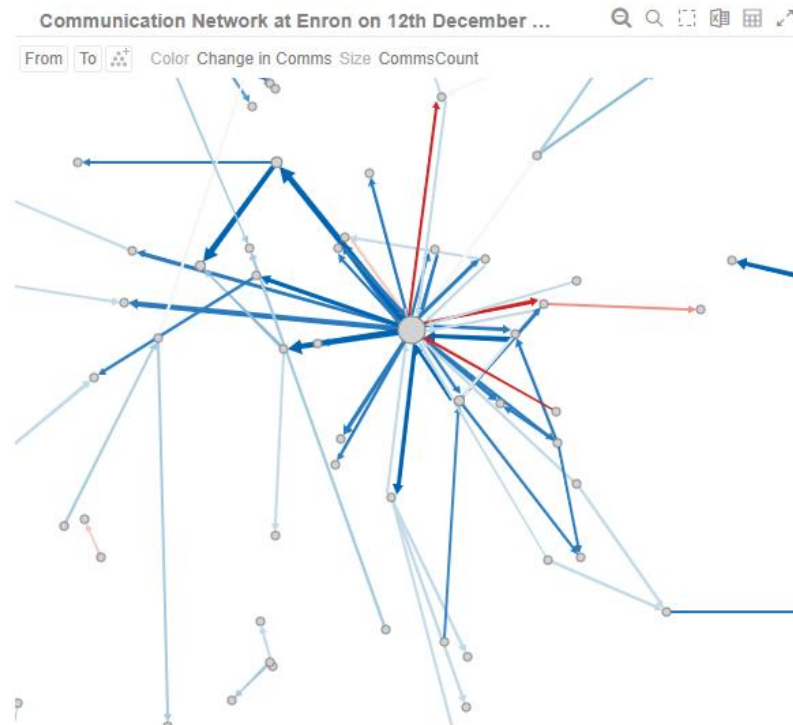
Mouse pointer has been dragged to define an area of interest.



During selection for zooming


### After

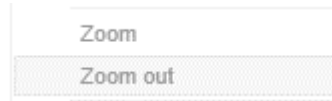
Selected items is zoomed in and the **Zoom Out** icon has is displayed.



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

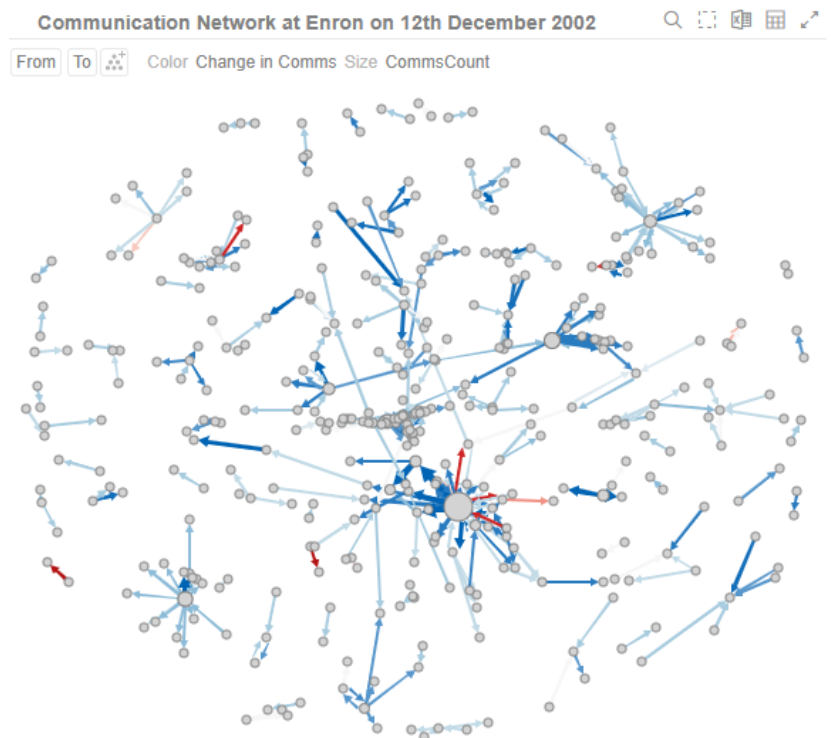


## Zooming In and Out with Mouse Wheel

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

Examples:

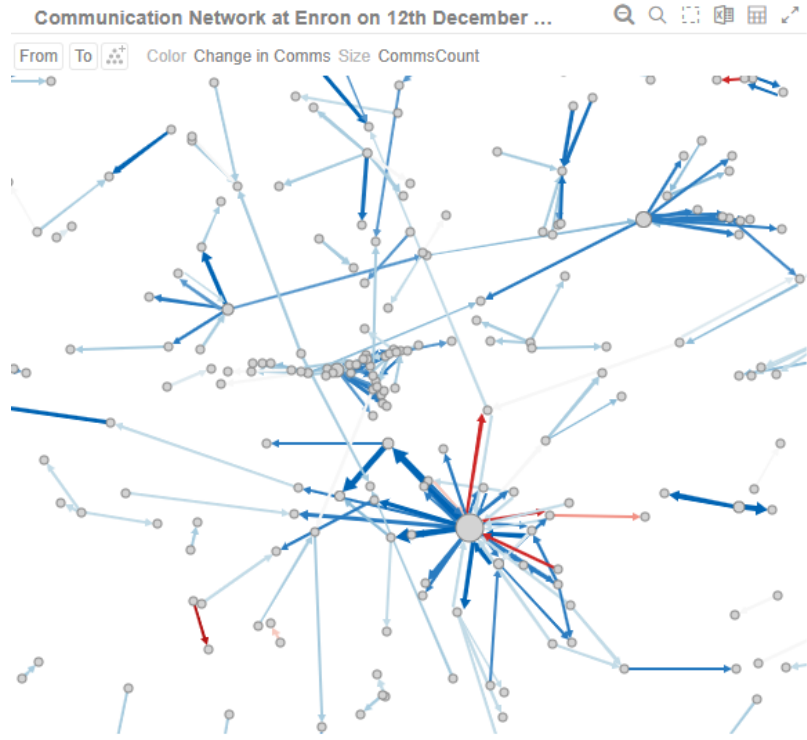
### No Zoom



No zoom

**Slight Zoom**

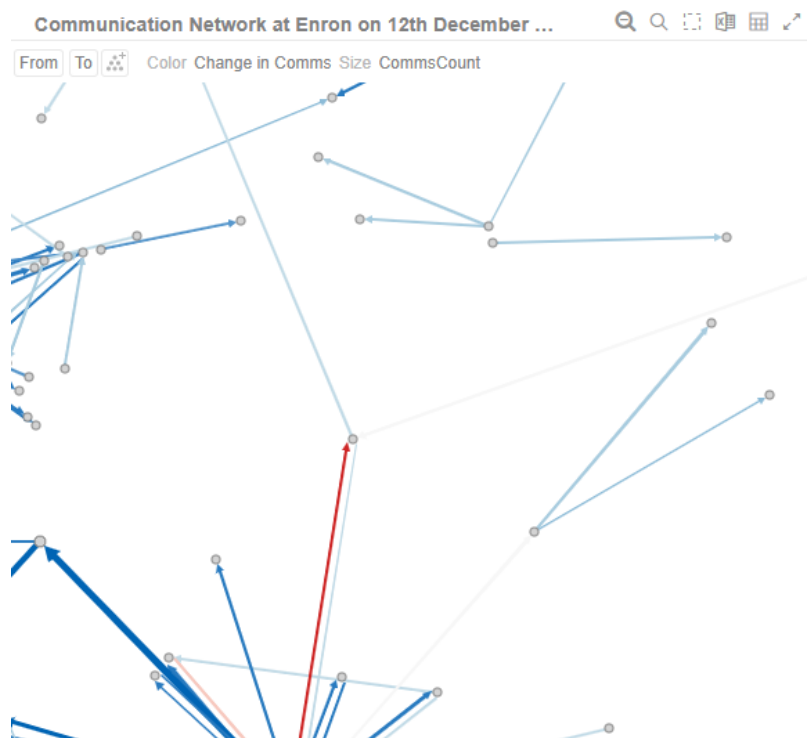
One mouse wheel rotation.



Slight zoom

**Detailed Zoom**

Several mouse wheel rotations.



Detailed zoom

## Panning Around Within the Zoomed Area

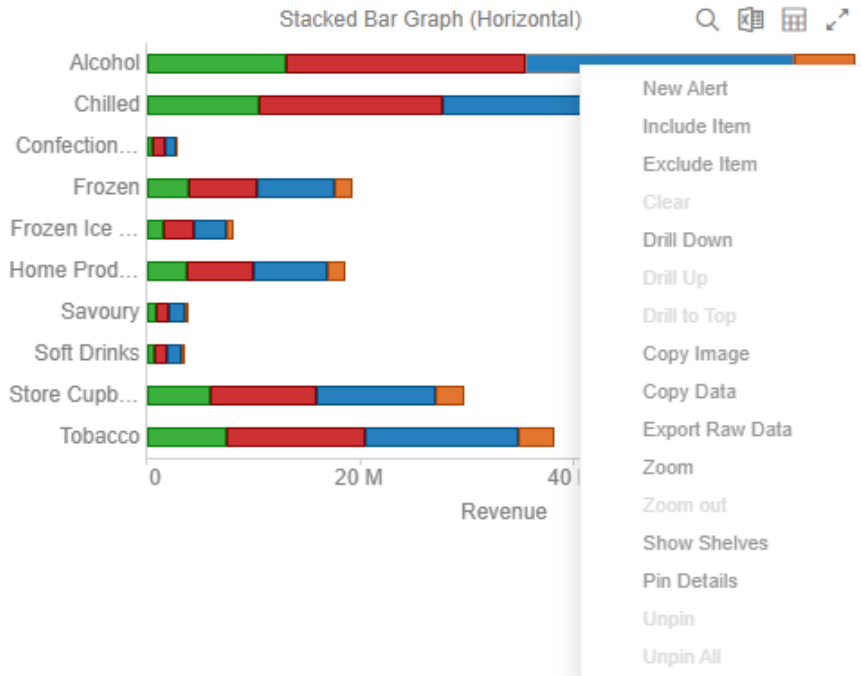
Clicking on the zoomed area turns the mouse pointer into . Drag the mouse to pan around the zoomed area.

## Variable Visibility

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

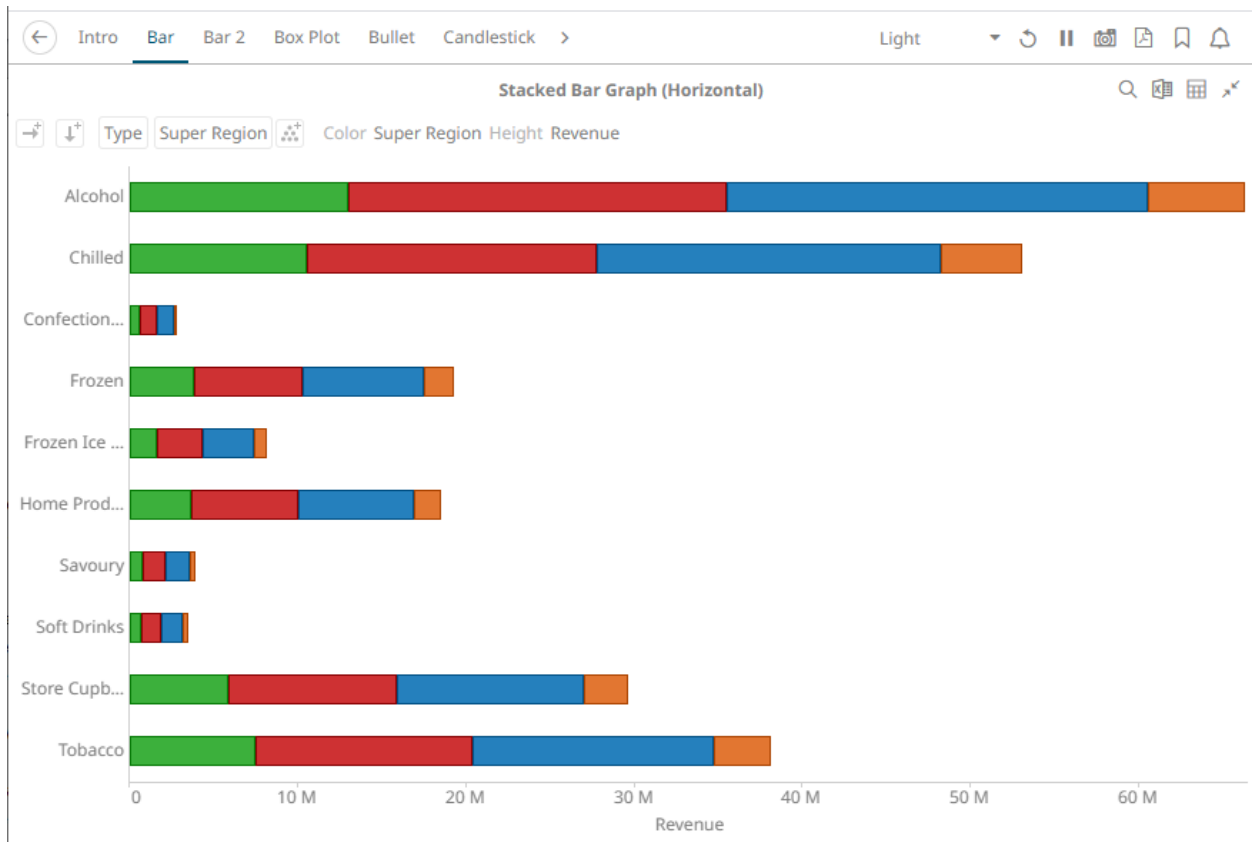
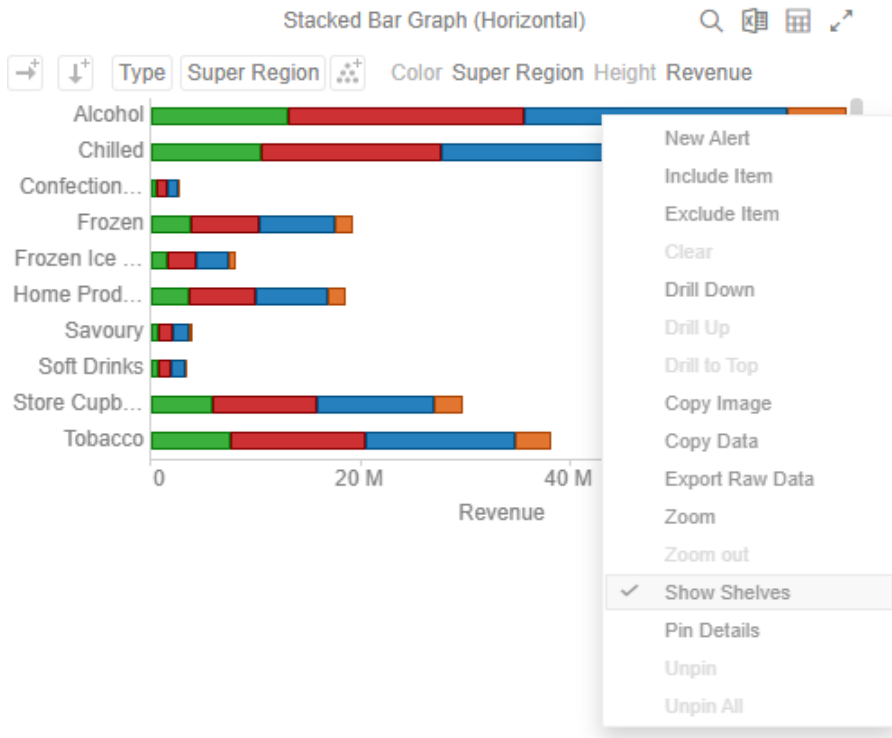
This function is often useful in creating simple views for public websites or executive dashboards.

By default, *Show Shelves* is turned off.



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

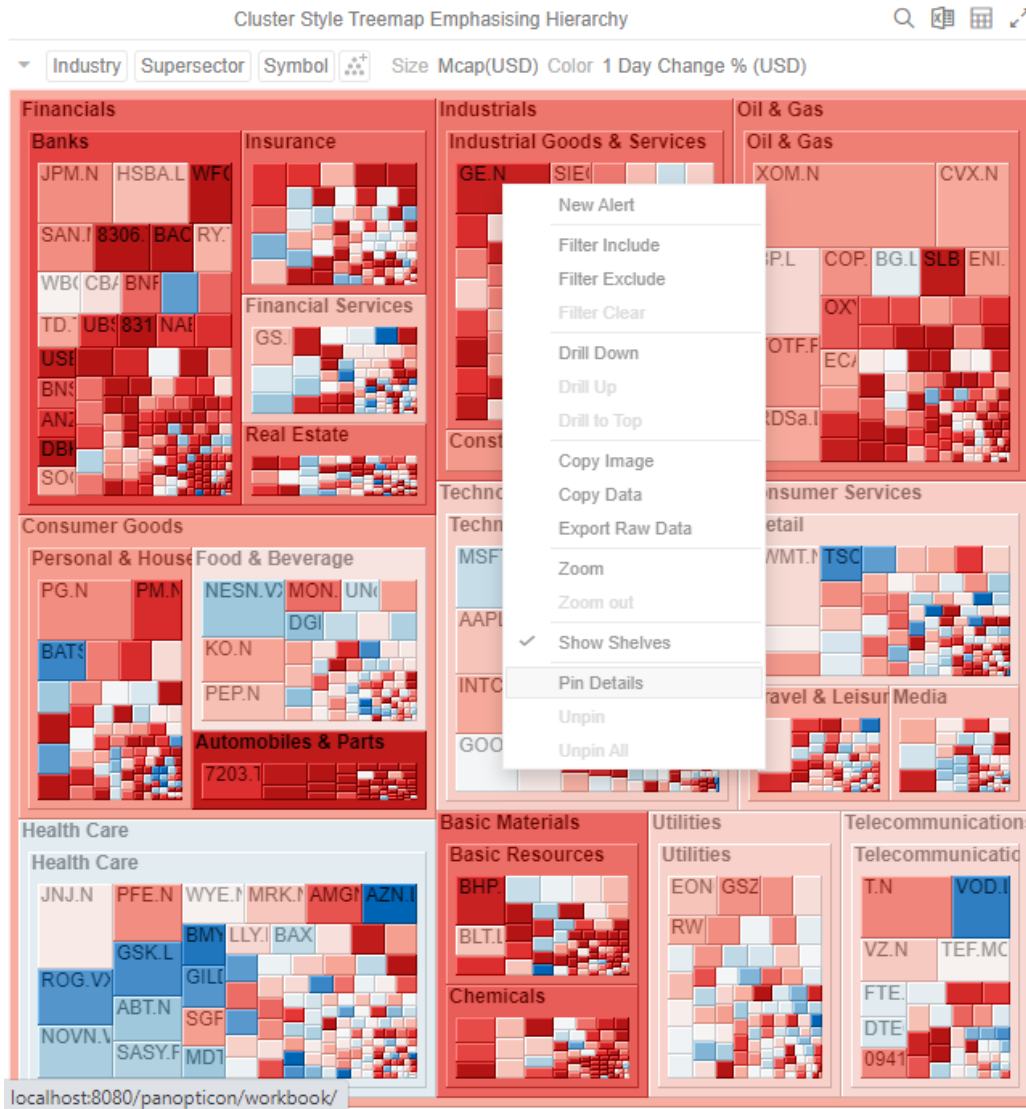




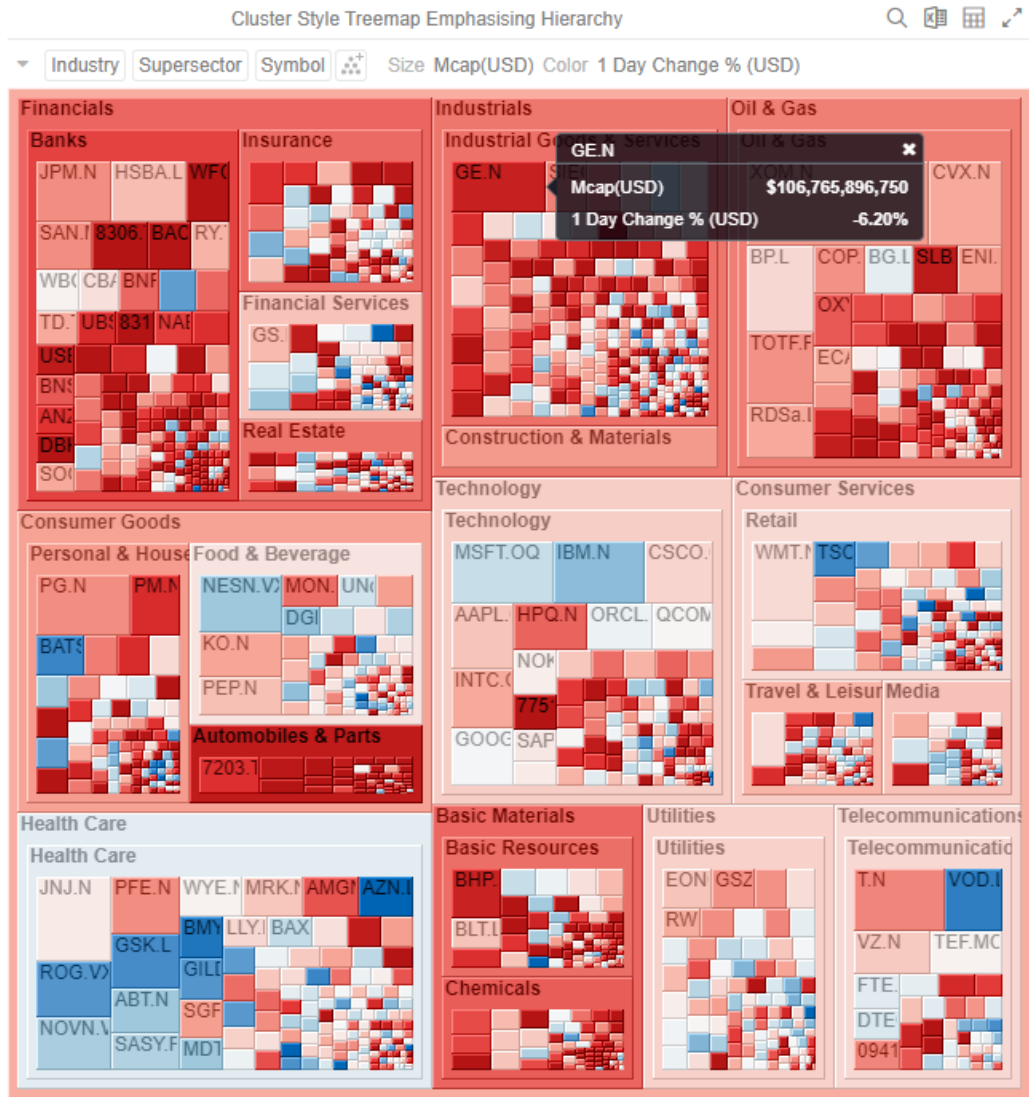
## Pinning Details Pop-up

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.

Pin Details

Unpin

Unpin All

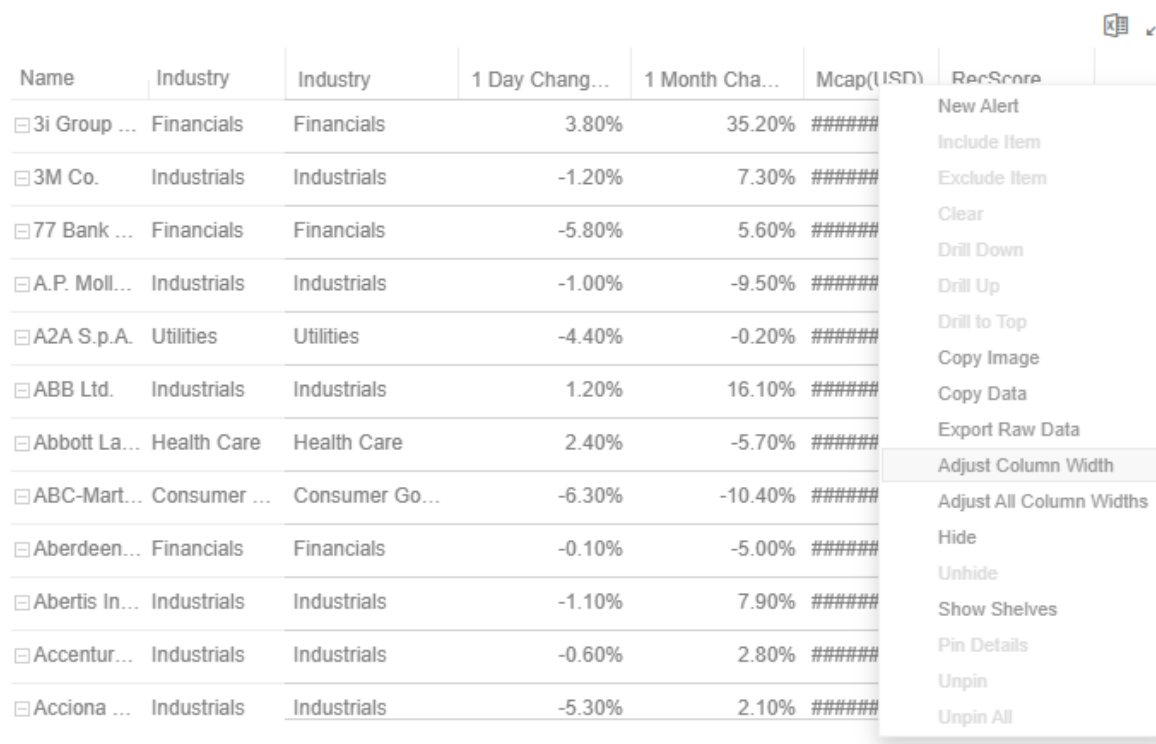
To unpin, you can either click  or right-click on the item and select **Unpin** on the context menu. Select **Unpin All** in the context menu to remove all of the pinned *Details* pop-up.

## 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



Name	Industry	Industry	1 Day Chang...	1 Month Cha...	Mcap(USD)	RecScore
3i Group ...	Financials	Financials	3.80%	35.20%	#####	
3M Co.	Industrials	Industrials	-1.20%	7.30%	#####	
77 Bank ...	Financials	Financials	-5.80%	5.60%	#####	
A.P. Moll...	Industrials	Industrials	-1.00%	-9.50%	#####	
A2A S.p.A.	Utilities	Utilities	-4.40%	-0.20%	#####	
ABB Ltd.	Industrials	Industrials	1.20%	16.10%	#####	
Abbott La...	Health Care	Health Care	2.40%	-5.70%	#####	
ABC-Mart...	Consumer ...	Consumer Go...	-6.30%	-10.40%	#####	
Aberdeen...	Financials	Financials	-0.10%	-5.00%	#####	
Abertis In...	Industrials	Industrials	-1.10%	7.90%	#####	
Accentur...	Industrials	Industrials	-0.60%	2.80%	#####	
Acciona ...	Industrials	Industrials	-5.30%	2.10%	#####	

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. Moll...	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

Name	Industry	Industry	1 Day Chang...	1 Month Cha...	Mcap(USD)	RecScore	Mcap(local)
▢ Verbund ...	Utilities	Utilities	-1.50%	19.10%	#####	0.34	###
▢ Origin En...	Utilities	Utilities	-1.10%	19.30%	#####	0.32	###
▢ AGL Ener...	Utilities	Utilities	3.40%	20.30%	#####	0.51	###
▢ TransAlta...	Utilities	Utilities	-1.20%	-12.70%	#####	0.29	###
▢ Canadian...	Utilities	Utilities	-4.70%	-7.20%	#####	0.32	###
▢ Fortis Inc.	Utilities	Utilities	-1.50%	-0.90%	#####	0.21	###
▢ Alpiq Hol...	Utilities	Utilities	0.50%	-8.10%	#####	0.26	###
▢ BKW FM...	Utilities	Utilities	-0.60%	-1.90%	#####	0.27	###
▢ E.ON AG	Utilities	Utilities	-1.60%	4.80%	#####	0.34	###
▢ RWE AG	Utilities	Utilities	-2.30%	7.20%	#####	0.28	###
▢ Endesa S...	Utilities	Utilities	-4.40%	-35.00%	#####	0.21	###
▢ Enagas S...	Utilities	Utilities	-6.90%	-14.20%	#####	0.17	###

- New Alert
- Include Item
- Exclude Item
- Clear
- Drill Down
- Drill Up
- Drill to Top
- Copy Image
- Copy Data
- Export Raw Data
- Adjust Column Width
- Adjust All Column Widths**
- Hide
- Unhide
- Show Shelves
- Pin Details
- Unpin
- Unpin All

All of the column widths of the table are adjusted.

Name	Industry	1 Day Change % (USD)	1 Month Change %	1 Week Change % (USD)	Mcap(USD)	RecScore	Mcap(local)
▢ 3i Group ...	Financials	0.04	0.36	0.01	1,488,911,563.00	0.42	1,038,763,431.00
▢ 3M Co.	Industrials	-0.01	0.07	0.01	31,869,237,156.00	0.25	31,869,237,156.00
▢ 77 Bank L...	Financials	-0.06	0.07	-0.03	1,855,149,668.00	0.39	183,233,133,458.00
▢ A.P. Molle...	Industrials	-0.01	-0.13	-0.08	4,742,697,140.00	0.32	26,605,819,548.00
▢ A2A S.p.A.	Utilities	-0.04	-0.04	-0.05	1,906,029,009.00	0.28	1,435,587,112.00
▢ ABB Ltd.	Industrials	0.01	0.13	-0.02	32,461,622,181.00	0.36	36,909,178,148.00
▢ Abbott La...	Health Care	0.02	-0.06	-0.02	73,392,451,232.00	0.36	73,392,451,232.00
▢ ABC-Mart...	Consumer ...	-0.06	-0.10	-0.03	556,753,517.00	0.26	54,990,545,128.00
▢ Aberdeen...	Financials	0.00	-0.05	-0.09	1,310,061,051.00	0.34	913,985,455.00
▢ Abertis In...	Industrials	-0.01	0.04	-0.04	4,574,542,373.00	0.28	3,445,463,864.00
▢ Accentur...	Industrials	-0.01	-0.05	-0.13	17,063,968,693.00	0.37	17,063,968,693.00

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.

**Flat Table of Company Performance**

Name	Close(local)	Mcap(USD)	Day Ch...	1 Week Change...	2 Week Change...	2 Week Change...	1 Month Chang...	1 Month Chang...	2 Month Chang...	3 Month Chang...
3i Group PLC	2.71	#####	3.80%	1.40%	29.00%	■	35.23%	●	18.95%	1.98%
3M Co.	49.72	#####	-1.21%	0.81%	4.74%		7.32%	●	-7.57%	-13.03%
77 Bank Ltd.	487.00	#####	-5.78%	-2.86%	7.20%		5.59%	●	-4.09%	-9.07%
A.P. Moller-Mae...	24,600.00	#####	-1.02%	-8.09%	7.04%		-9.46%	●	-9.22%	-17.78%
A2A S.p.A.	1.14	#####	-4.40%	-8.11%	14.14%	■	-0.15%	●	-12.93%	-15.59%
ABB Ltd.	15.89	#####	1.17%	-1.73%	2.31%		16.05%	●	7.15%	-5.61%
Abbott Laboratories	47.70	#####	2.36%	-2.17%	-0.31%		-5.69%	●	-13.96%	-10.27%
ABC-Mart Inc.	1,892.00	#####	-6.35%	-2.90%	0.96%		-10.41%	●	-42.08%	-47.49%
Aberdeen Asset...	1.27	#####	-0.13%	-9.46%	0.76%		-5.04%	●	-1.54%	21.50%
Aberis...	11.77	#####	-1.06%	-4.02%	6.69%		7.89%	●	-3.98%	-12.32%
Accenture Ltd. CI A	27.49	#####	-0.61%	-13.34%	-0.59%		2.84%	●	-5.57%	-8.10%
Acciona S.A.	77.45	#####	-5.29%	-11.98%	-2.86%		2.09%	●	-9.33%	-18.31%
Accor S.A.	26.22	#####	1.21%	-10.59%	-18.10%	■	-19.79%	●	-24.82%	-39.71%
ACE Ltd.	40.40	#####	0.62%	0.00%	10.78%		4.91%	●	-7.47%	-22.74%

Drag the arrow to the desired width.

**Flat Table of Company Performance**

Name	Close(local)	Mcap(USD)	1 Day Ch...	1 Week Change...	2 Week Change...	2 Week Change...	1 Month Chang...	1 Month Chang...	2 Month Chang...	3 Month Chang...
3i Group PLC	2.71	\$1,488,911,563	3.80%	1.40%	29.00%	■	35.23%	●	18.95%	1.98%
3M Co.	49.72	\$31,869,237,156	-1.21%	0.81%	4.74%		7.32%	●	-7.57%	-13.03%
77 Bank Ltd.	487.00	\$1,855,149,668	-5.78%	-2.86%	7.20%		5.59%	●	-4.09%	-9.07%
A.P. Moller-Mae...	24,600.00	\$4,742,697,140	-1.02%	-8.09%	7.04%		-9.46%	●	-9.22%	-17.78%
A2A S.p.A.	1.14	\$1,906,029,009	-4.40%	-8.11%	14.14%	■	-0.15%	●	-12.93%	-15.59%
ABB Ltd.	15.89	\$32,461,622,181	1.17%	-1.73%	2.31%		16.05%	●	7.15%	-5.61%
Abbott Laboratories	47.70	\$73,392,451,232	2.36%	-2.17%	-0.31%		-5.69%	●	-13.96%	-10.27%
ABC-Mart Inc.	1,892.00	\$556,753,517	-6.35%	-2.90%	0.96%		-10.41%	●	-42.08%	-47.49%
Aberdeen Asset...	1.27	\$1,310,061,051	-0.13%	-9.46%	0.76%		-5.04%	●	-1.54%	21.50%
Aberis...	11.77	\$4,574,542,373	-1.06%	-4.02%	6.69%		7.89%	●	-3.98%	-12.32%
Accenture Ltd. CI A	27.49	\$17,063,968,693	-0.61%	-13.34%	-0.59%		2.84%	●	-5.57%	-8.10%
Acciona S.A.	77.45	\$2,628,978,079	-5.29%	-11.98%	-2.86%		2.09%	●	-9.33%	-18.31%
Accor S.A.	26.22	\$4,696,232,401	1.21%	-10.59%	-18.10%	■	-19.79%	●	-24.82%	-39.71%
ACE Ltd.	40.40	\$13,449,428,418	0.62%	0.00%	10.78%		4.91%	●	-7.47%	-22.74%

## 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**.

**Hierarchical Table of Company Performance**

Price & Value			Changes (in % USD)							
Industry	Supersector	Name	Close(local)	1 Day	Mcap(USD)	1 Week	1 Month	1 Month	2 Month	3 Month
Grand Total				-2.23%	\$14,776,798,934,247	-2	6.89%	●	-1.52%	-8.40%
Basic Materials Total				-3.73%	\$889,465,969,106	-3	13.23%	●	8.88%	2.08%
Basic Resources Total				-3.58%	\$512,851,697,625	-3	17.22%	●	13.80%	7.76%
Acerinox S.A.			8.75	-1.20%	\$1,488,375,565	-1	0.20%	●	-11.50%	-27.80%
Agnico-Eagle...			72.47	2.20%	\$8,914,475,285	2	25.50%	●	17.90%	24.60%
Alcoa Inc.			7.34	14.40%	\$7,140,479,481	20	37.10%	●	14.50%	-16.50%
Allegheny...			21.93	-6.80%	\$2,011,309,511	-3	11.00%	●	0.30%	-8.20%
Alumina Ltd.			1.28	3.30%	\$1,310,698,840	1	14.00%	●	22.70%	0.50%
Anglo Ameri...			11.86	-0.70%	\$22,812,823,982	-14	15.40%	●	-6.90%	-24.20%
Antofagasta PLC			5.04	-2.20%	\$2,805,252,436	-1	8.90%	●	19.40%	18.80%
Arceormittal			15.28	-4.80%	\$15,023,575,434	1	-1.30%	●	-10.60%	-17.10%
Arch Coal Inc.			13.37	-7.00%	\$1,914,166,642	-13	-3.80%	●	-12.00%	-16.00%
Barrick Gold...			40.81	1.30%	\$28,238,225,116	-1	2.40%	●	-12.80%	-9.90%

- New Alert
- Filter Include
- Filter Exclude
- Filter Clear
- Drill Down
- Drill Up
- Drill to Top
- Copy Image
- Copy Data
- Export Raw Data
- Adjust Column Width
- Adjust All Column Widths
- Hide
- Unhide
- ✓ Show Shelves
- Pin Details
- Unpin
- Unpin All

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

Hierarchical Table of Company Performance 🔍 ↗

Industry Supersector Name

Industry	Supersector	Name	Price & Value		Changes (in % USD)					
			Close(local)	1 Day	Mcap(USD)	1 Week	1 Month	2 Month	3 Month	
Grand Total				-2.23%	\$14,776,798,					
Basic Materials Total				-3.73%	\$889,465,					
	Basic Resources Total			-3.58%	\$512,851,					
	Acerinox S.A.		8.75	-1.20%	\$1,488,					
	Agnico-Eagle...		72.47	2.20%	\$8,914,					
	Alcoa Inc.		7.34	14.40%	\$7,140,					
	Allegheny...		21.93	-6.80%	\$2,011,					
	Alumina Ltd.		1.28	3.30%	\$1,310,					
	Anglo Ameri...		11.86	-0.70%	\$22,812,					
	Antofagasta PLC		5.04	-2.20%	\$2,805,					
	ArcelorMittal		15.28	-4.80%	\$15,023,					
	Arch Coal Inc.		13.37	-7.00%	\$1,914,					
	Barrick Gold...		40.81	1.30%	\$28,238,					

Price & Value

Changes (in % USD)

1 Week

1 Month

2 Month

3 Month

New Alert 39%

Filter Include 23%

Filter Exclude 22%

Filter Clear 20%

Drill Down 50%

Drill Up 10%

Drill to Top 00%

Copy Image 00%

Copy Data 40%

Export Raw Data 30%

Adjust Column Width 30%

Adjust All Column Widths 40%

Hide

Unhide

✓ Show Shelves

Pin Details

Unpin

Unpin All

### 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%
<input checked="" type="checkbox"/>	Basic Materials Total		\$889,465,969,106	-611.30%	-516.20%	1726.50%
<input type="checkbox"/>	Consumer Goods Total		\$1,860,384,194,222	-642.00%	-334.80%	1518.80%
	<input type="checkbox"/>	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**

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 T			\$60,384,194,222	-642.00%	-334.80%	1518.80%
[-] Auto			\$328,426,116,057	-307.10%	-157.50%	445.00%
[-] Foo			\$765,925,707,172	-95.00%	-48.90%	292.80%
			\$3,020,799,974	-1.10%	2.90%	17.30%
			\$4,301,263,792	1.90%	4.40%	3.90%
			\$1,133,884,270	2.20%	6.90%	3.60%
			\$1,086,602,372	0.80%	-7.30%	8.30%
			\$2,369,831,966	-4.70%	-1.00%	6.90%

- New Alert
- Include Item
- Exclude Item
- Clear
- Drill Down
- Drill Up
- Drill to Top
- Copy Image
- Copy Data
- Export Raw Data
- ✓ Show Sub Totals
- ✓ Show Grand Total
- Show Supersector
- Expand All
- Collapse All
- Show Shelves
- Pin Details
- Unpin
- Unpin 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	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.

**Hierarchical Table of Company Performance**

Industry Supersector Name

Price & Value

Changes (in % USD)

Industry	Supersector	Name	Close(local)	Mcap(USD)	1 Day	1 Week	2 Week	2 Week	1 Month	1 Month	2 Month	3 Month
Grand Total				\$14,776,798,934,247	-2.24%	-2.66%	5.94%		6.89%		-1.52%	-8.40%
Basic Materials Total				\$889,465,969,106	-3.74%	-3.74%	7.13%		13.23%		8.88%	2.08%
		Basic Resources Total		\$512,851,697,625	-3.60%	-3.60%	10.14%		17.22%		13.80%	7.76%
		Acerinox S.A.	8.75	\$1,488,375,565	-1.23%	-11.55%	3.70%		0.23%		-11.47%	-27.76%
		Agnico-Eagle...	72.47	\$8,914,475,285	2.21%	2.47%	28.09%		25.48%		17.90%	24.57%
		Alcoa Inc.	7.34	\$7,140,479,481	14.39%	20.57%	45.79%		37.05%		14.53%	-16.54%
		Allegheny...	21.93	\$2,011,309,511	-6.84%	-3.14%	5.62%		11.02%		0.31%	-8.17%
		Alumina Ltd.	1.28	\$1,310,698,840	3.28%	5.10%	34.54%		13.99%		22.68%	0.48%
		Anglo American...	11.86	\$22,812,823,982	-0.68%	-14.15%	4.66%		15.36%		-6.86%	-24.23%
		Antofagasta PLC	5.04	\$2,805,252,436	-2.16%	-11.08%	-1.57%		8.92%		19.42%	18.83%
		ArcelorMittal	15.28	\$15,023,575,434	-4.83%	1.54%	8.74%		-1.33%		-10.61%	-17.12%
		Arch Coal Inc.	13.37	\$1,914,166,642	-6.96%	-13.57%	-2.48%		-3.81%		-11.98%	-15.96%

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

**Hierarchical Table of Company Performance**

Industry Supersector Name

Price & Value

Changes (in % USD)

Industry	Supersector	Name	Close(local)	Mcap(USD)	1 Day	1 Week	2 Week	2 Week	1 Month	1 Month	2 Month	3 Month
Grand Total				\$14,776,798,934,247	-2.24%	-2.66%	5.94%		6.89%		-1.52%	-8.40%
Basic Materials Total				\$889,465,969,106	-3.74%	-3.74%	7.13%		13.23%		8.88%	2.08%
		Basic Resources Total		\$512,851,697,625	-3.60%	-3.60%	10.14%		17.22%		13.80%	7.76%
		Acerinox S.A.	8.75	\$1,488,375,565	-1.23%	-11.55%	3.70%		0.23%		-11.47%	-27.76%
		Agnico-Eagle Mines Ltd.	72.47	\$8,914,475,285	2.21%	2.47%	28.09%		25.48%		17.90%	24.57%
		Alcoa Inc.	7.34	\$7,140,479,481	14.39%	20.57%	45.79%		37.05%		14.53%	-16.54%
		Allegheny Technologies Inc.	21.93	\$2,011,309,511	-6.84%	-3.14%	5.62%		11.02%		0.31%	-8.17%
		Alumina Ltd.	1.28	\$1,310,698,840	3.28%	5.10%	34.54%		13.99%		22.68%	0.48%
		Anglo American PLC	11.86	\$22,812,823,982	-0.68%	-14.15%	4.66%		15.36%		-6.86%	-24.23%
		Antofagasta PLC	5.04	\$2,805,252,436	-2.16%	-11.08%	-1.57%		8.92%		19.42%	18.83%
		ArcelorMittal	15.28	\$15,023,575,434	-4.83%	1.54%	8.74%		-1.33%		-10.61%	-17.12%
		Arch Coal Inc.	13.37	\$1,914,166,642	-6.96%	-13.57%	-2.48%		-3.81%		-11.98%	-15.96%

### 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 ...	1 Week Change...	2 Week Change...	2 Week Change...	1 Month Chang...	1 Month Chang...	2 Month Chang...	3 Month Chang...
A.P. Moller-Mae...	24,600.00	\$4,742,697,140	-1.02%	-8.09%	7.04%		-9.46%		-9.22%	-17.78%
A2A S.p.A.	1.14	\$1,906,029,009	-4.40%	5.11%	14.14%		-0.15%		-12.93%	-15.59%
ABB Ltd.	15.89	\$32,461,622,181	1.17%	-1.73%	2.31%		16.05%		7.15%	-5.61%
Abbott Laboratories	47.70	\$73,392,451,232	2.36%	-2.17%	-0.31%		-5.69%		-13.96%	-10.27%
ABC-Mart Inc.	1,892.00	\$556,753,517	-6.35%	-2.90%	0.96%		-10.41%		-42.08%	-47.49%
Aberdeen Asset...	1.27	\$1,310,061,051	-0.13%	-9.46%	0.76%		-5.04%		-1.54%	21.50%
Abertis...	11.77	\$4,574,542,373	-1.06%	-4.02%	6.69%		7.89%		-3.98%	-12.32%
Accenture Ltd. CI A	27.49	\$17,063,968,693	-0.61%	-13.34%	-0.59%		2.84%		-5.57%	-8.10%
Acciona S.A.	77.45	\$2,628,978,079	-5.29%	-11.98%	-2.86%		2.09%		-9.33%	-18.31%
Accor S.A.	26.22	\$4,696,232,401	1.21%	-10.59%	-18.10%		-19.79%		-24.82%	-39.71%
ACE Ltd.	40.40	\$13,449,428,418	0.62%	0.00%	10.78%		4.91%		-7.47%	-22.74%
Acergy S.A.	42.10	\$1,138,612,378	-6.62%	-12.02%	6.15%		16.19%		12.51%	11.93%
Acerinox S.A.	8.75	\$1,488,375,565	-1.23%	-11.55%	3.70%		0.23%		-11.47%	-27.76%
Arkerms & Van	36.18	\$1,078,072,552	-1.01%	1.10%	2.67%		5.94%		9.44%	-5.66%

**Flat Table of Company Performance**

Name	Close(local)	Mcap(USD)	1 Day Change ...	1 Week Change...	2 Week Change...	2 Week Change...	1 Month Chang...	1 Month Chang...	2 Month Chang...	3 Month Chang...
A.P. Moller-Mae...	24,600.00	\$4,742,697,140	-1.02%	-8.09%	7.04%		-9.46%		-9.22%	-17.78%
A2A S.p.A.	1.14	\$1,906,029,009	-4.40%	5.11%	14.14%		-0.15%		-12.93%	-15.59%
ABB Ltd.	15.89	\$32,461,622,181	1.17%	-1.73%	2.31%		16.05%		7.15%	-5.61%
Abbott Laboratories	47.70	\$73,392,451,232	2.36%	-2.17%	-0.31%		-5.69%		-13.96%	-10.27%
ABC-Mart Inc.	1,892.00	\$556,753,517	-6.35%	-2.90%	0.96%		-10.41%		-42.08%	-47.49%
Aberdeen Asset...	1.27	\$1,310,061,051	-0.13%	-9.46%	0.76%		-5.04%		-1.54%	21.50%
Abertis...	11.77	\$4,574,542,373	-1.06%	-4.02%	6.69%		7.89%		-3.98%	-12.32%
Accenture Ltd. CI A	27.49	\$17,063,968,693	-0.61%	-13.34%	-0.59%		2.84%		-5.57%	-8.10%
Acciona S.A.	77.45	\$2,628,978,079	-5.29%	-11.98%	-2.86%		2.09%		-9.33%	-18.31%
Accor S.A.	26.22	\$4,696,232,401	1.21%	-10.59%	-18.10%		-19.79%		-24.82%	-39.71%
ACE Ltd.	40.40	\$13,449,428,418	0.62%	0.00%	10.78%		4.91%		-7.47%	-22.74%
Acergy S.A.	42.10	\$1,138,612,378	-6.62%	-12.02%	6.15%		16.19%		12.51%	11.93%
Acerinox S.A.	8.75	\$1,488,375,565	-1.23%	-11.55%	3.70%		0.23%		-11.47%	-27.76%
Arkerms & Van	36.18	\$1,078,072,552	-1.01%	1.10%	2.67%		5.94%		9.44%	-5.66%

**Fiat 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%	-5.01%	●	-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%
Aceryg 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%
Arkermans & Van	36.18	€1,078,072,552	-1.01%	2.67%		5.94%	-5.01%	●	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	Aceryg S.A.	NOK	42.10	7,688,024,637	\$1,138,612,378	-6.6%	-12.0%	6.1%	16.2%

**Performance by Company**

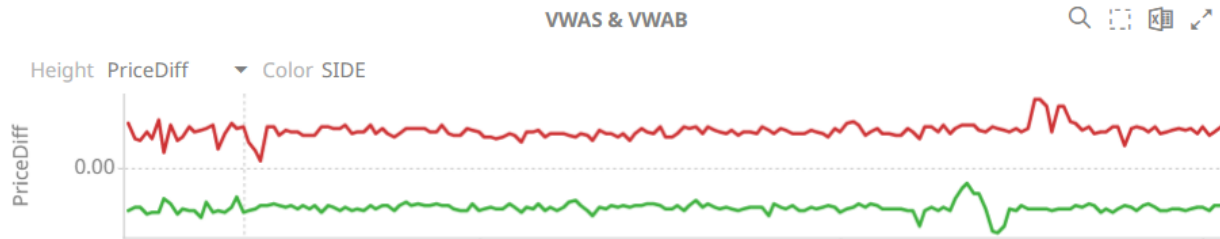
▼ Symbol

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-Servicios 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	4.4%	2.1%	6.6%	7.4%
YUM.N	Yum! Brands Inc.	USD	27.48	12,711,093,703	\$12,711,093,703	-4.5%	-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	-1.7%	-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**

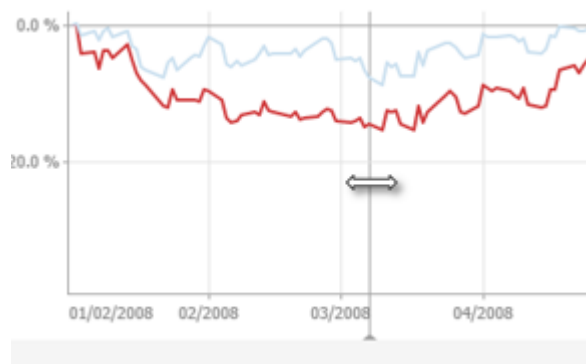


The snapshot will be set for the selected time.

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.

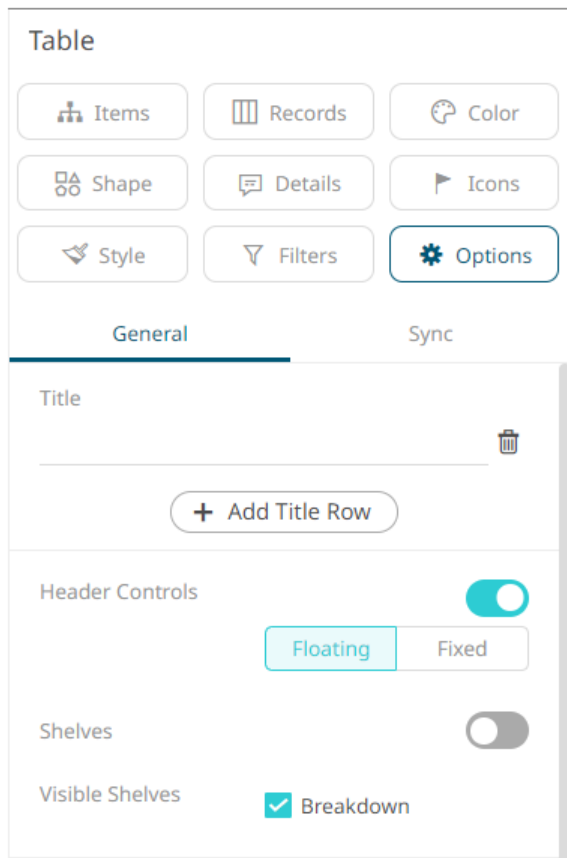
The screenshot shows the 'Line Graph' configuration panel. At the top, there are several control buttons: 'Columns', 'Rows', 'Items', 'Y', 'Time Axis', 'Color', 'Alpha', 'Ref Lines', 'Details', 'Filters', and 'Options'. Below these buttons is a list of settings:

- Axis Bar Thickness: 25
- Preferred Tick Space: 100
- Style: One Row
- End Points: Automatic
- Tick Points: Automatic
- Align to Time Window:
- Zero Grid Line: None
- Snapshot Grid Line: None (dropdown menu is open)
- Minor Grid Line: None
- Visible Periods: Dotted
- Min Range: Dashed
- Increment Step: Solid

The 'Snapshot Grid Line' dropdown menu is open, showing the following options: None (highlighted in blue), Dotted, Dashed, and Solid.

## 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
<a href="#">Rubber Band Zoom</a> 	Allows zooming in on multiple items of interest in a visualization.
<a href="#">Rubber Band Selection</a> 	Allows multiple items in a visualization to be selected or lassoed.
<a href="#">Export Excel</a> 	Exports static visualizations to a CSV-format file.
<a href="#">Toggle Display Mode</a> 	Displays a visualization as a table and vice versa.
<a href="#">Maximize</a> 	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.

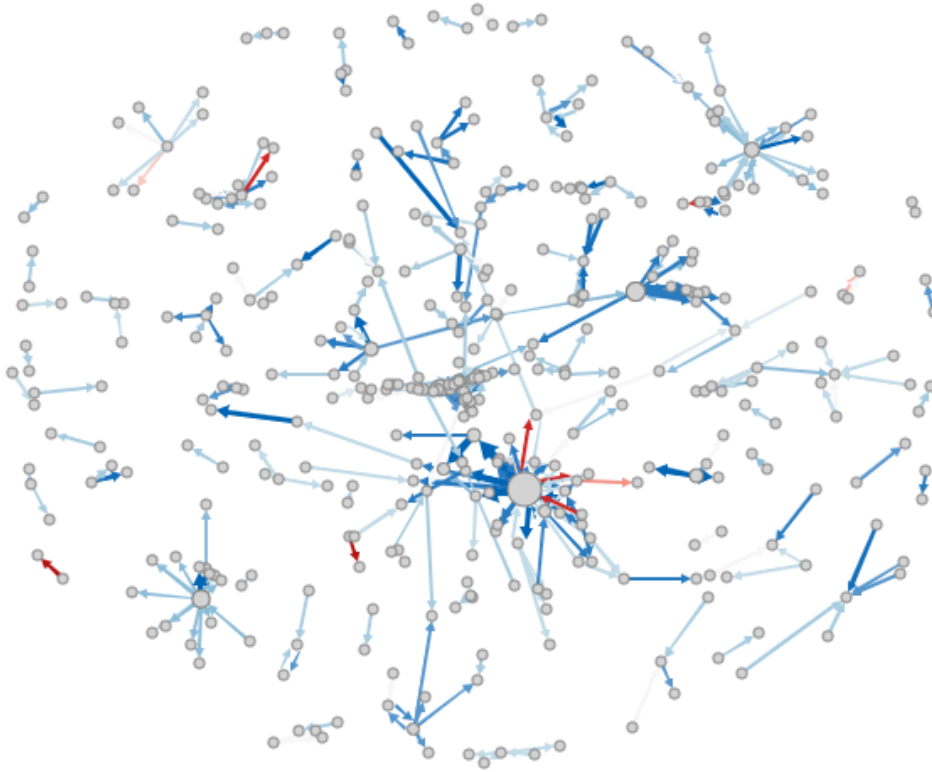
### Toggling Between a Visualization and a Table

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

Communication Network at Enron on 12th December 2002



From To Color Change in Comms Size CommsCount



It will be replaced with a Table visualization.



Communication Network at Enron on 12th December 2002



From To Color Change in Comms Size CommsCount

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

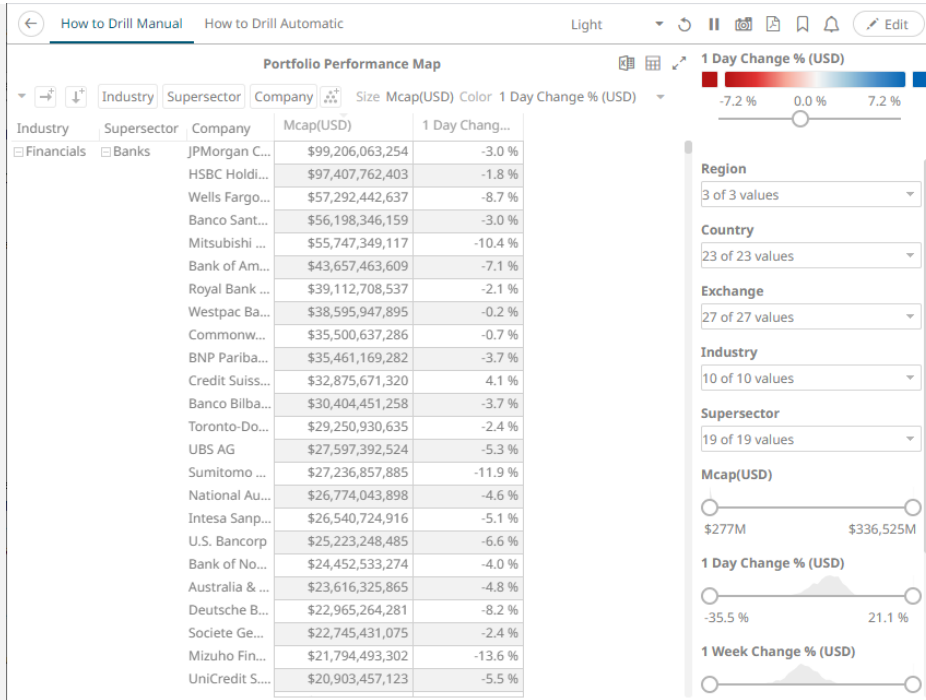
**NOTE**

The Table will default to displaying zebra stripes.

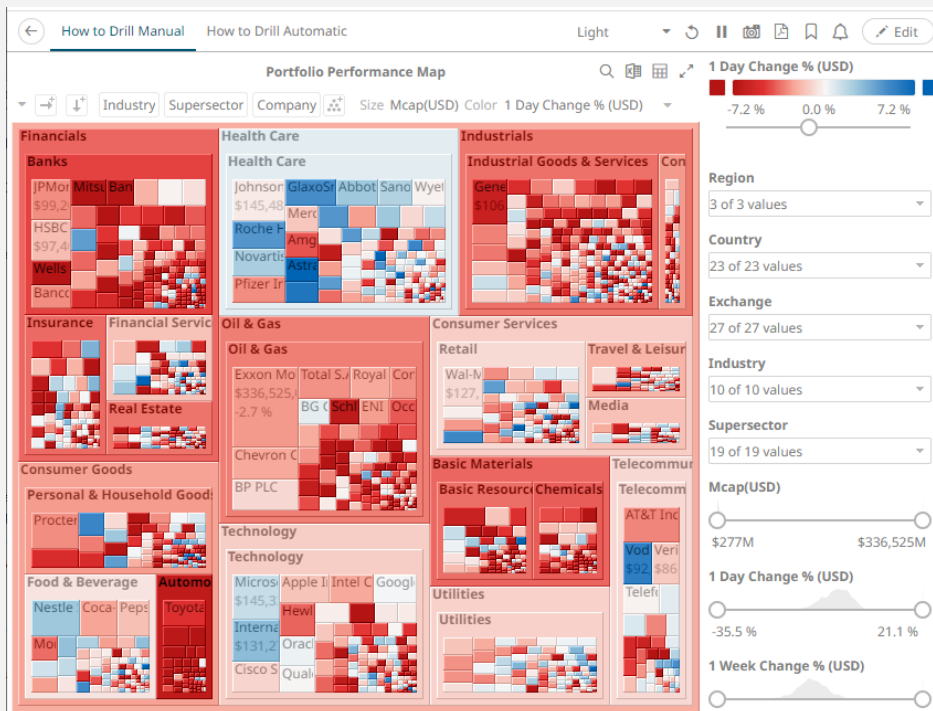
When the **Toggle Display Mode** icon is clicked again, the Table will toggle back to the original visualization.

**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

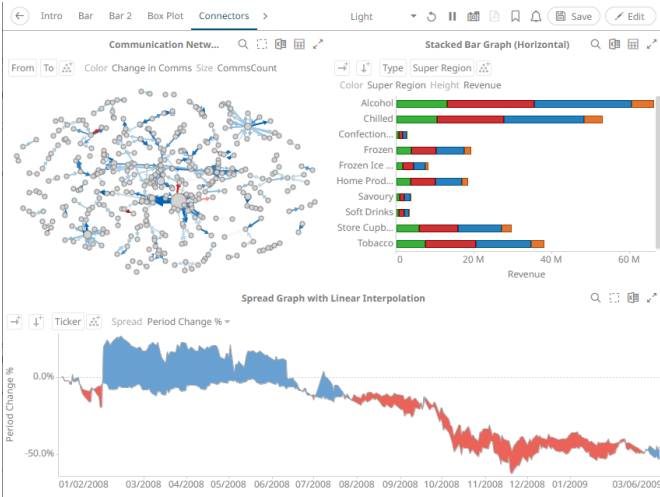


Consequently, toggling back will then display the filtered view of the visualization. The example below will only display Basic Materials and Telecommunications.

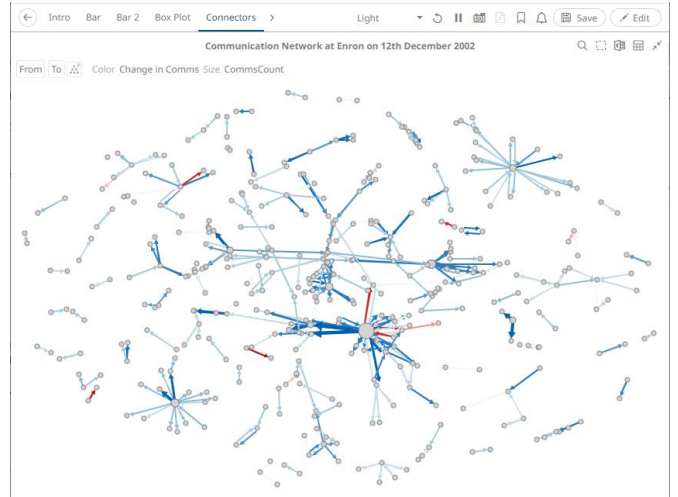


## Maximize

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

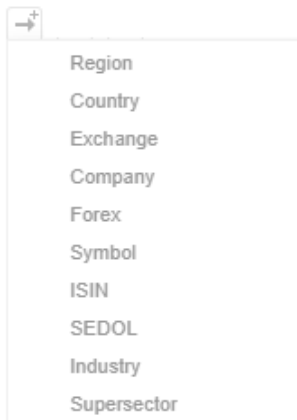


After clicking Maximize

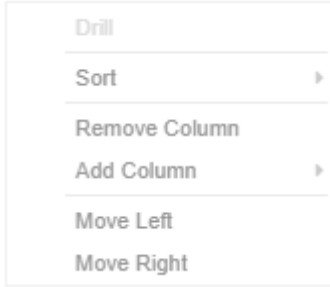
## Drilling Into, Sorting, Removing, Adding, and Swapping Columns in a Breakdown and Cross Tab Points

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.

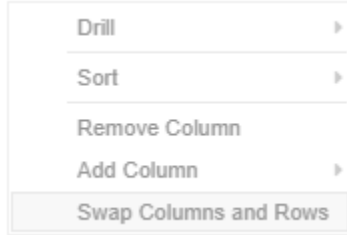
For example:



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



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

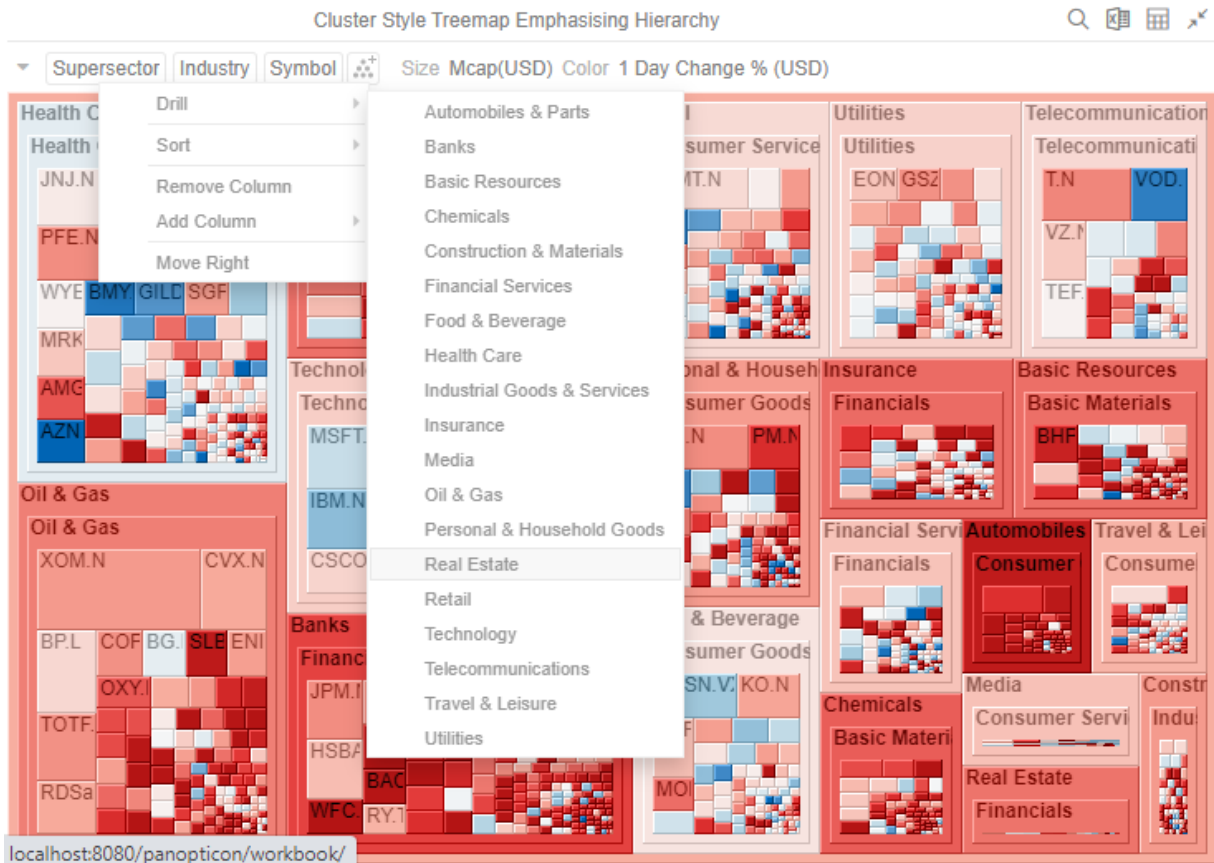


### Drilling into Hierarchy Displays

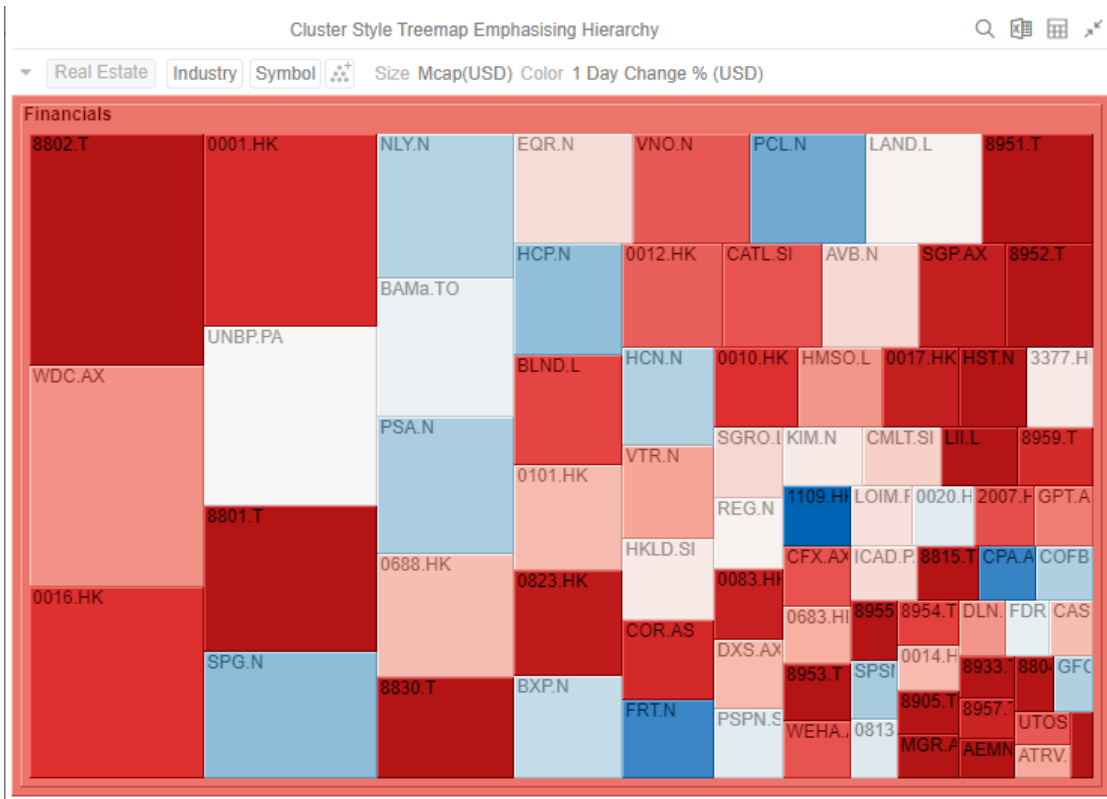
You can drill into cross tab columns, cross tab rows, and breakdown columns.

#### Steps:

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



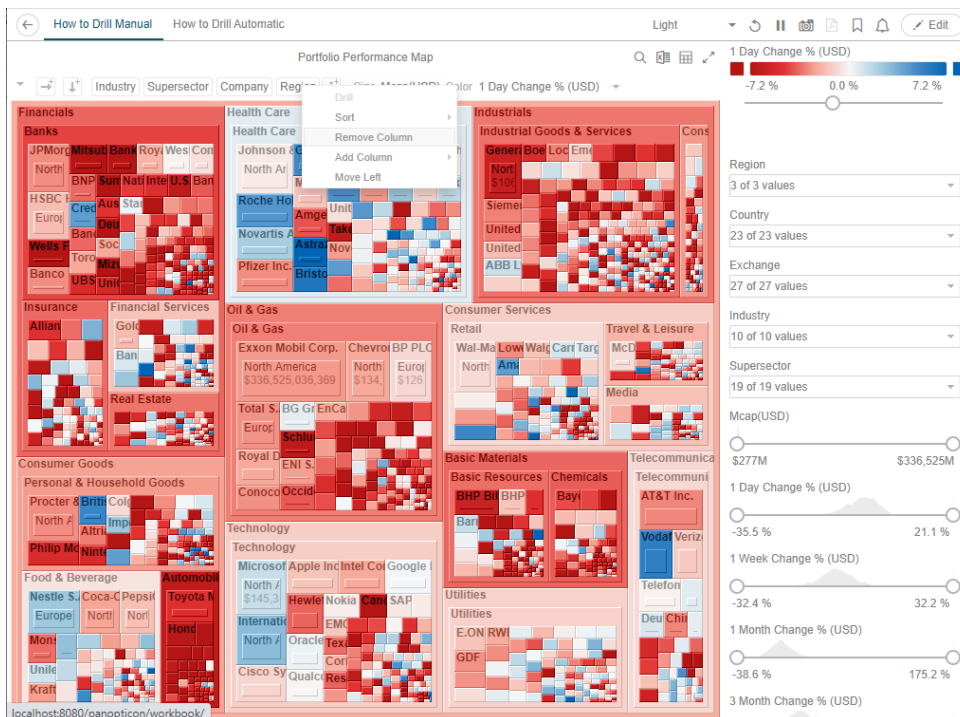
The selected level will appear gray.



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

## Removing Breakdown or Cross Tab Columns

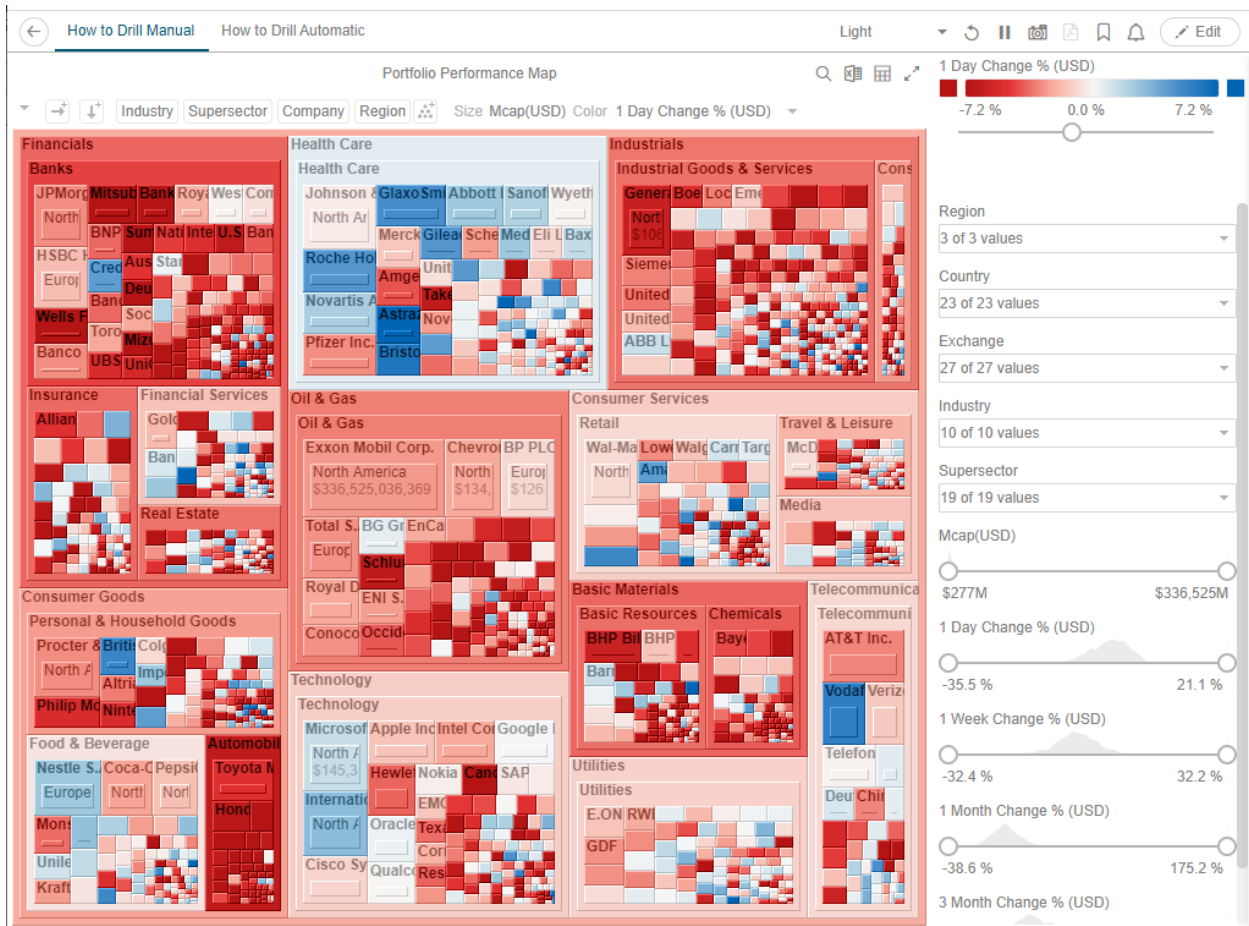
Right-click on a column and select **Remove Column** on the context menu.



## 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*.

The screenshot displays the Altair Panopticon software interface. At the top, there's a navigation bar with "How to Drill Manual" and "How to Drill Automatic" tabs, and a "Light" theme selector. The main area is titled "Portfolio Performance Map" and shows a heatmap of various sectors. A context menu is open over a column, with the "Add Column" option selected. The menu includes options like "Drill", "Sort", "Remove Column", "Add Column", and "Move Left". The "Add Column" option is highlighted, and a search box labeled "Search Columns" is visible. The background shows a heatmap of various sectors like Financials, Insurance, Oil & Gas, Retail, and Technology. On the right, there are filters for Region, Country, Exchange, Industry, Supersector, and Mcap(USD), along with performance metrics for 1 Day, 1 Week, 1 Month, and 3 Month changes.



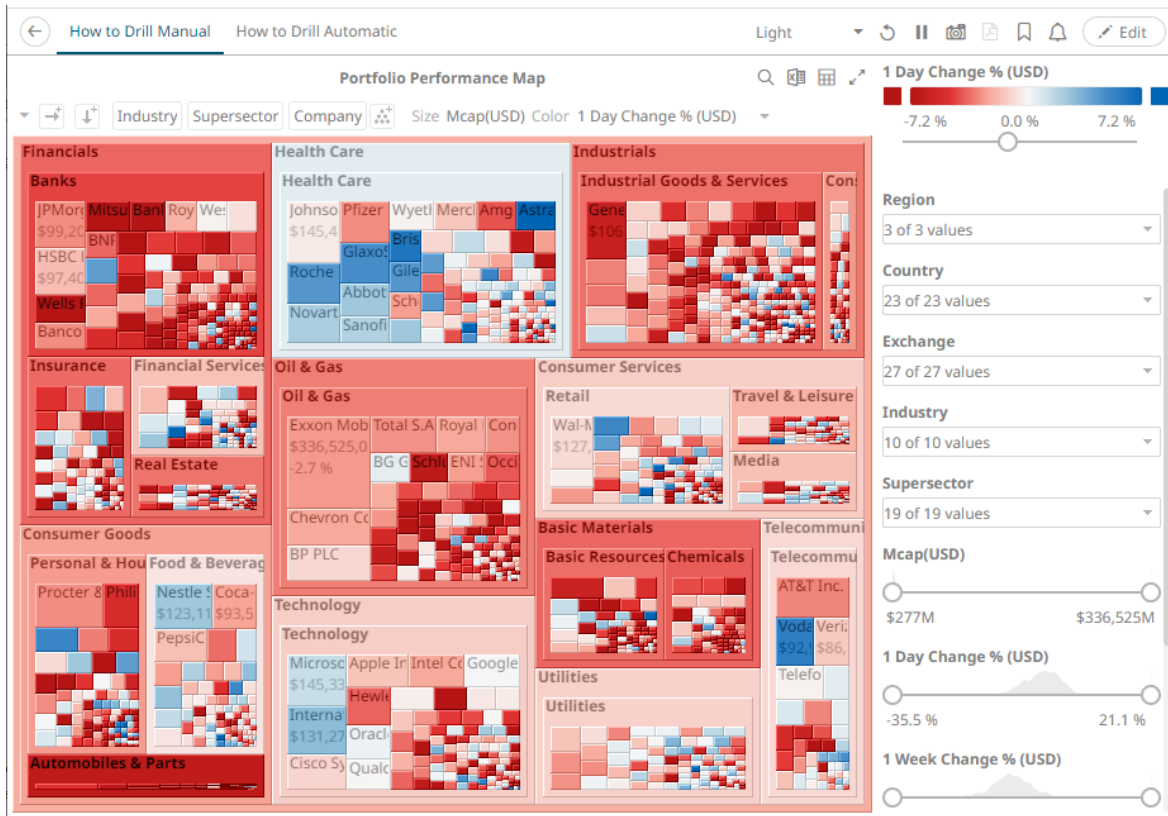
## Moving Breakdown Columns

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

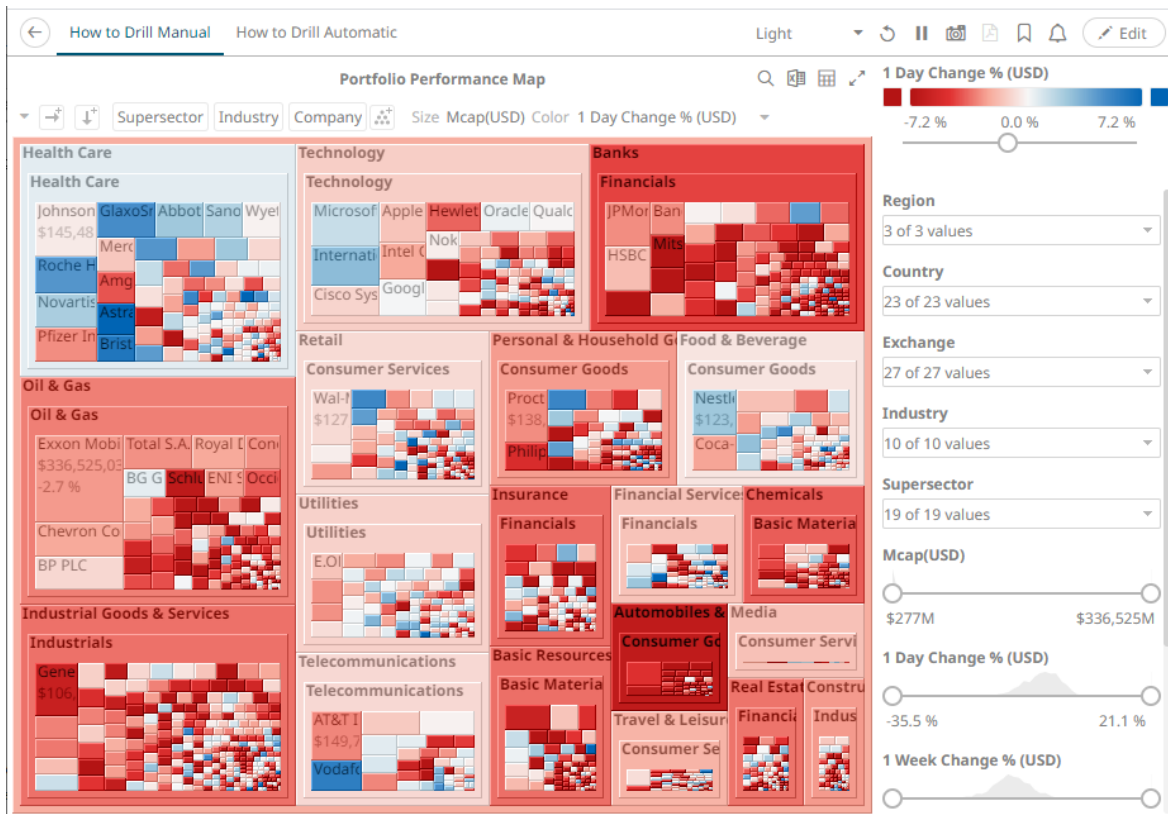
Right-click on a breakdown column and select **Move Right** or **Move Left** on the context menu.

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.

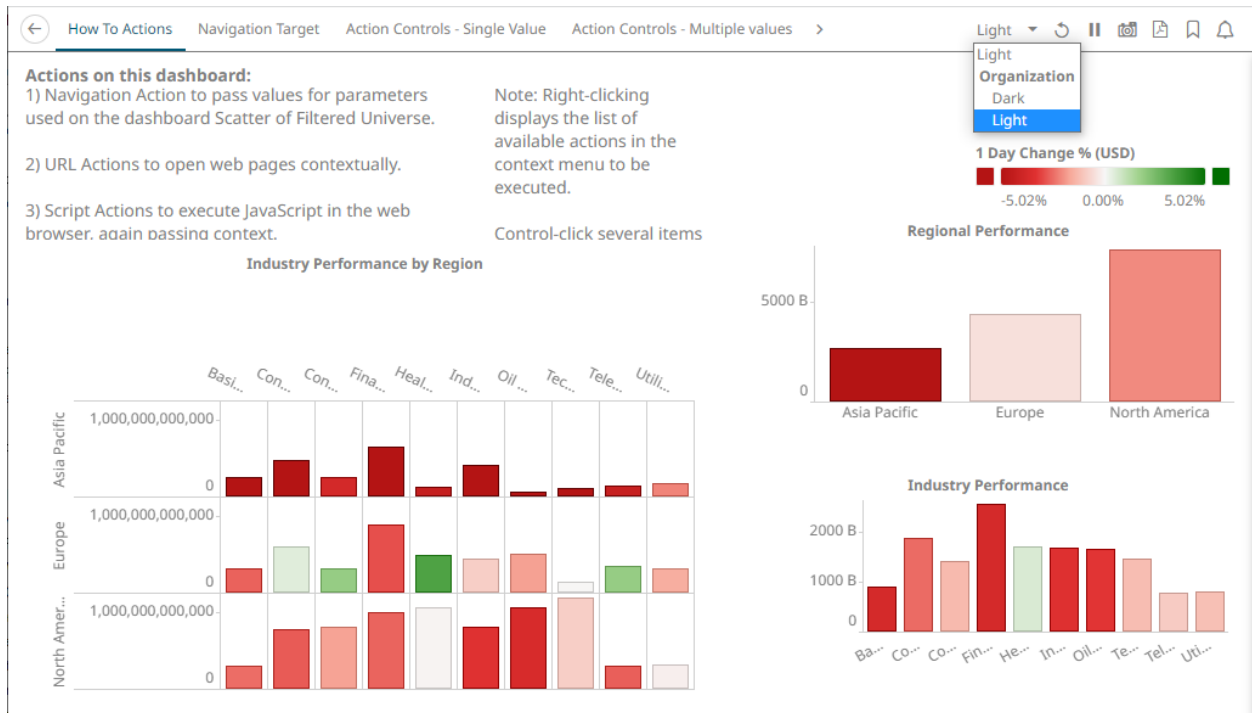
In a visualization that is cross tabbed, right-click on row or column and select **Swap Columns and Rows** on the context menu.

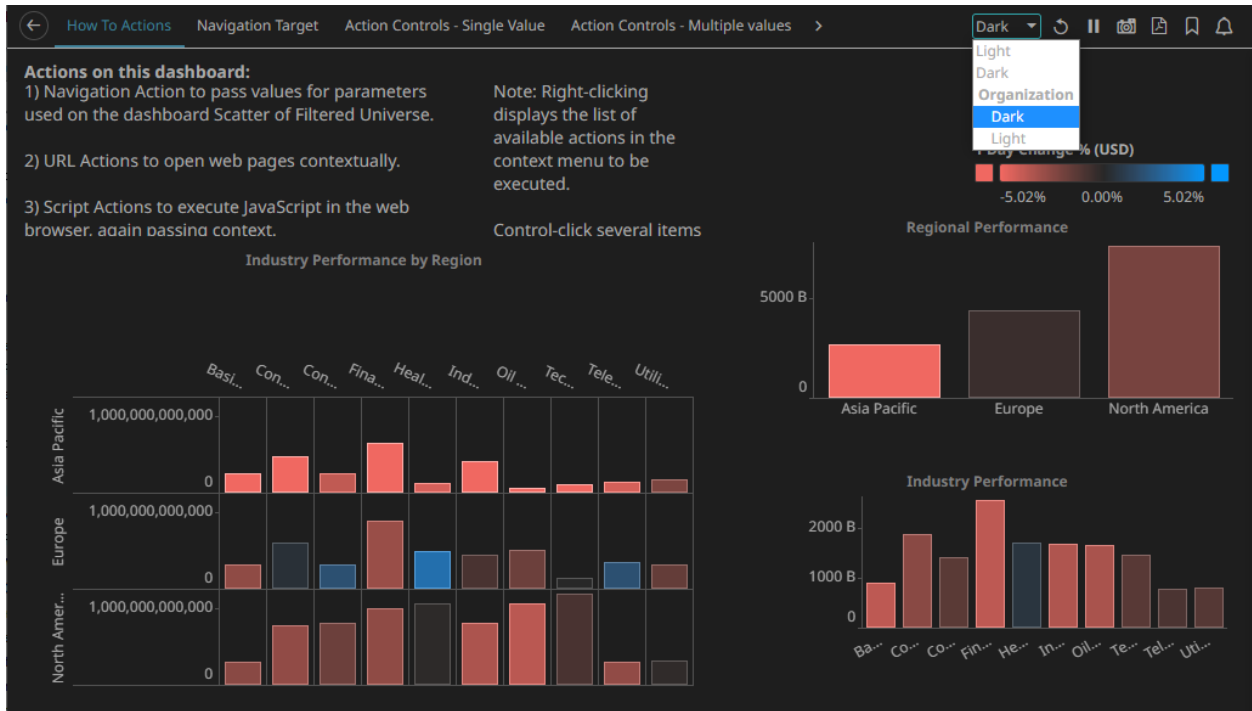
The rows and columns will be swapped in the *Columns* or *Rows* section of the visualization.

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:

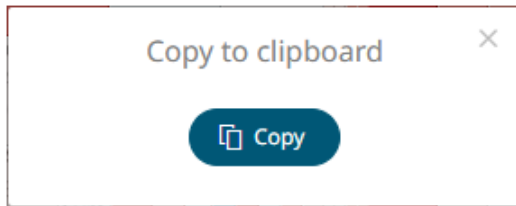


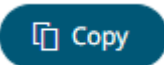
Toolbar Option	Description
Data Refresh 	Manually refreshes the data.
Pause Real-Time 	Clicking the icon changes it to  and pauses the streaming data sources.
<a href="#">Copy Image</a> 	Exports the whole dashboard image to the clipboard.
<a href="#">Create PDF Report</a> 	Set the dashboards that will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

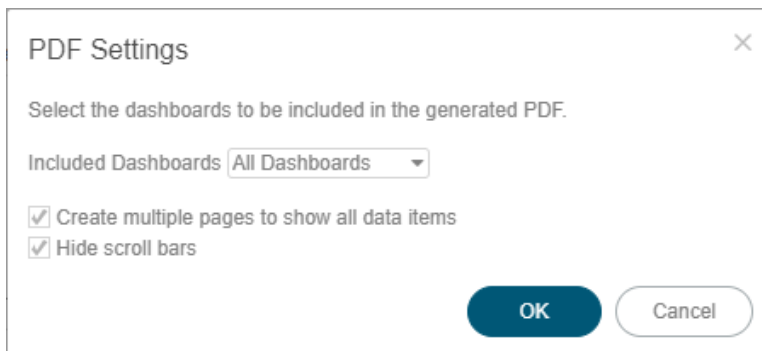
localhost:8080 says

There are unsaved changes, please save the workbook to ensure accurate export to PDF.

**OK**

### Steps:

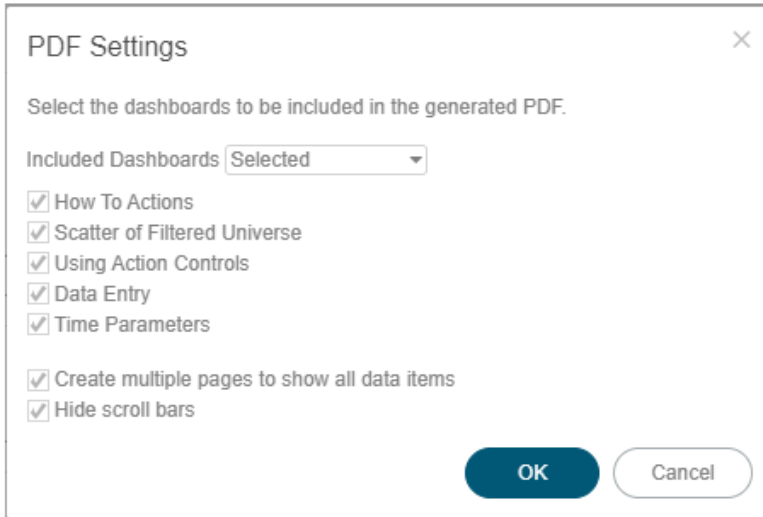
1. Click the **Bookmarks**  icon on the toolbar.  
The *PDF Settings* dialog displays.



2. Select the dashboards to be included:

- All dashboards
- Current dashboard
- Selected

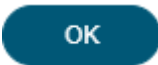
The check boxes are enabled and all the dashboards are checked by default.

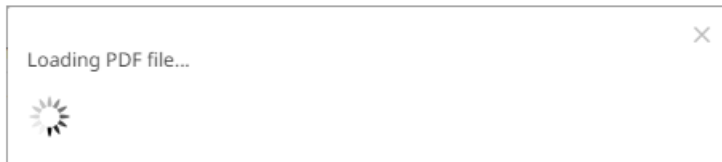


Check only those that will be included in the generated PDF.

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 Real Time to read all the datasets necessary to output the dashboard and produce the PDF file.


#### NOTE

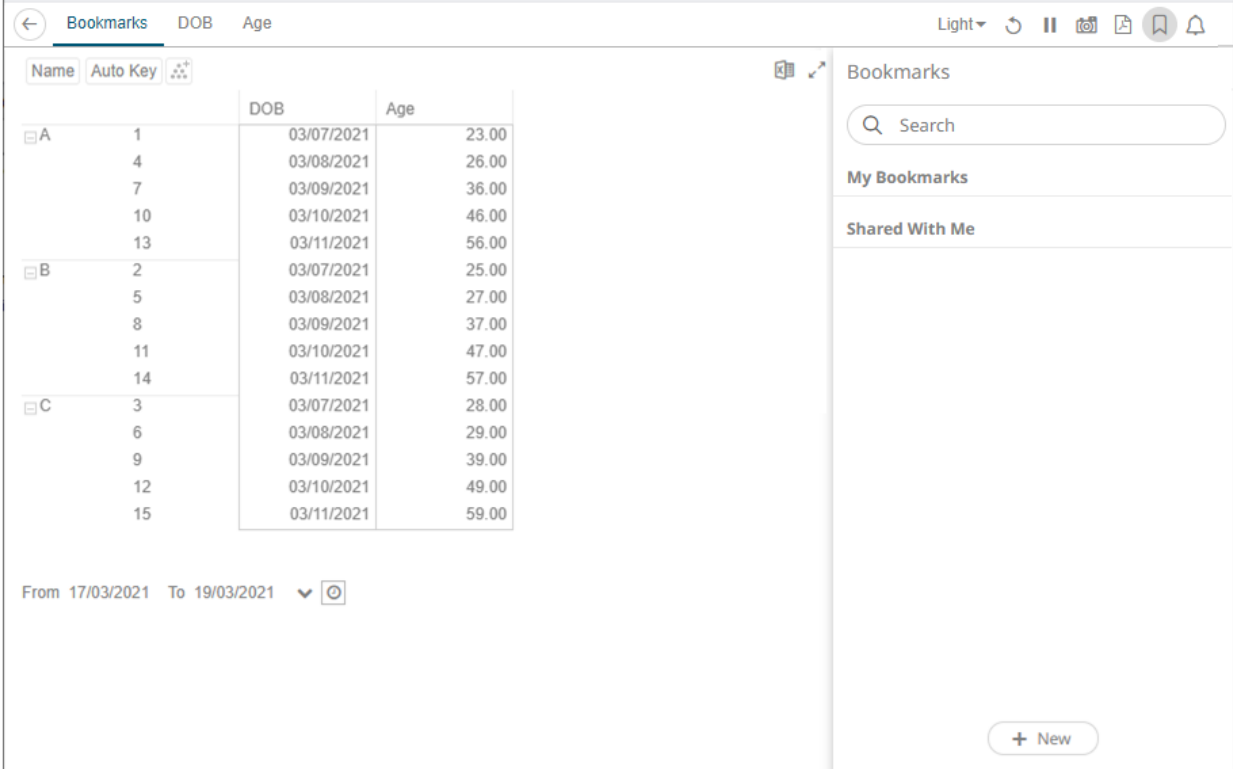
Ad hoc PDF generation in the Web client using Google Chrome (or other browsers) may be hindered by the AdBlock Extension.

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.



The screenshot shows a web application interface with a main data table and a right-hand sidebar. The main table has columns for 'Name', 'Auto Key', 'DOB', and 'Age'. It is divided into three sections: 'A', 'B', and 'C'. Section A contains rows 1-13, B contains 2-14, and C contains 3-15. The sidebar on the right is titled 'Bookmarks' and includes a search bar, sections for 'My Bookmarks' and 'Shared With Me', and a '+ New' button at the bottom.

Name	Auto Key	DOB	Age
A	1	03/07/2021	23.00
	4	03/08/2021	26.00
	7	03/09/2021	36.00
	10	03/10/2021	46.00
	13	03/11/2021	56.00
B	2	03/07/2021	25.00
	5	03/08/2021	27.00
	8	03/09/2021	37.00
	11	03/10/2021	47.00
C	14	03/11/2021	57.00
	3	03/07/2021	28.00
	6	03/08/2021	29.00
	9	03/09/2021	39.00
	12	03/10/2021	49.00
	15	03/11/2021	59.00

From 17/03/2021 To 19/03/2021

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>**.

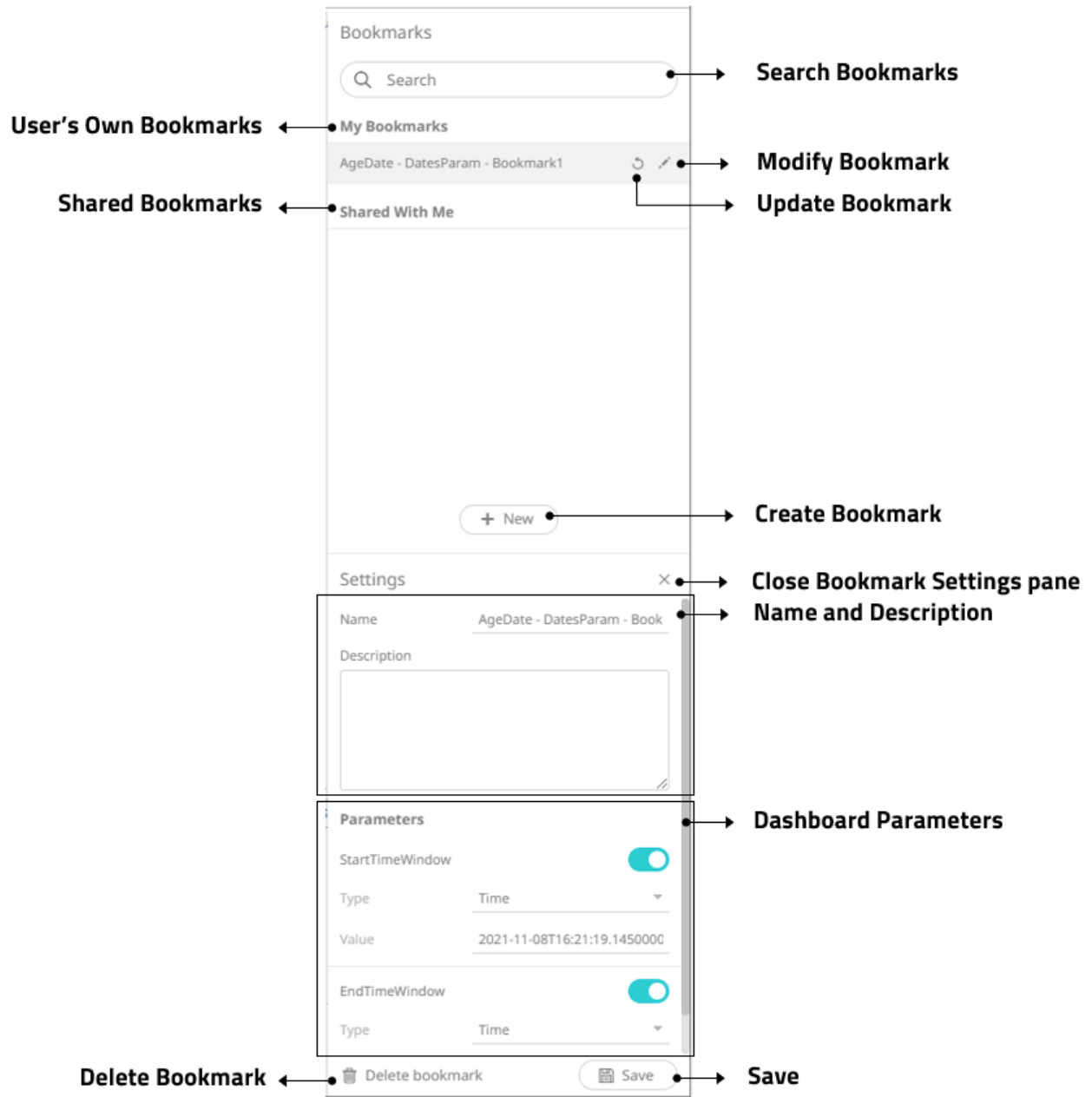
The screenshot displays the 'Bookmarks' application interface. At the top, there is a navigation bar with a back arrow, the title 'Bookmarks', and filters for 'DOB' and 'Age'. On the right side of the navigation bar, there are icons for 'Light' theme, refresh, pause, camera, print, and a notification bell.

The main content area features a table with columns for 'Name', 'Auto Key', 'DOB', and 'Age'. The data is organized into three groups: 'A', 'B', and 'C'. Below the table, there is a date range filter: 'From 17/03/2021 To 19/03/2021' with a dropdown arrow and a search icon.

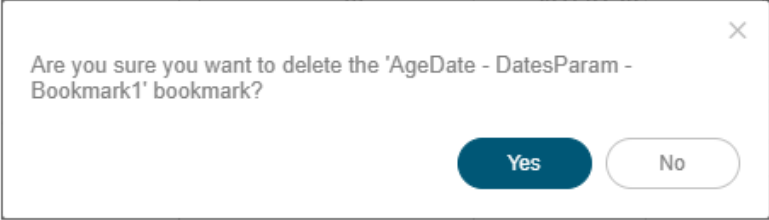
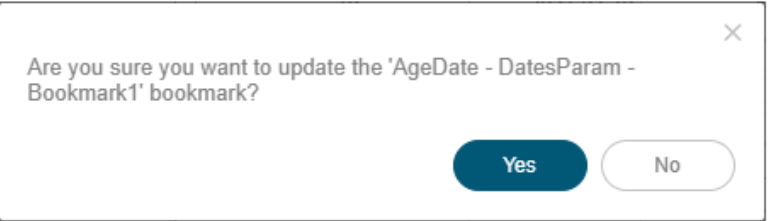
On the right side, there is a 'Bookmarks' sidebar. It includes a search bar, a section for 'My Bookmarks' with a single entry 'BookMarked - Bookmarks - Bookmark1' and a refresh icon, and a section for 'Shared With Me'. At the bottom of the sidebar is a '+ New' button.

Name	Auto Key	DOB	Age
A	1	03/07/2021	23.00
	4	03/08/2021	26.00
	7	03/09/2021	36.00
	10	03/10/2021	46.00
	13	03/11/2021	56.00
B	2	03/07/2021	25.00
	5	03/08/2021	27.00
	8	03/09/2021	37.00
	11	03/10/2021	47.00
	14	03/11/2021	57.00
C	3	03/07/2021	28.00
	6	03/08/2021	29.00
	9	03/09/2021	39.00
	12	03/10/2021	49.00
	15	03/11/2021	59.00

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.

	 <p>Click <b>Yes</b> on the notification message to delete the bookmark.</p>
Search Bookmark	To search for a particular bookmark, enter it in the <i>Search</i> box. You can also enter one or more characters into the <i>Search</i> box and the suggested list of bookmarks that matched the entries will be displayed.
Modify Bookmark	Display the <i>Bookmark Settings</i> pane for the modification of the bookmark settings.
Update Bookmark	Update the bookmark settings.  <p>Click <b>Yes</b> on the notification message to update.</p>
Create Bookmark	Allows the creation of a new bookmark.
Close	Close the <i>Bookmark Settings</i> pane.
Name	Name of the bookmark.
Description	Description of the bookmark.
Dashboard Parameters	Available dashboard parameters.  <b>NOTES:</b> <ul style="list-style-type: none"> <li>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 <b>now</b>, 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.</li> <li>Directly modifying the parameter value in the bookmark (such as entering <b>now</b>, <b>today</b>, or <b>yesterday</b>) is not supported.</li> </ul>
Save	Enabled when a change is made in the bookmark settings. Click to save.



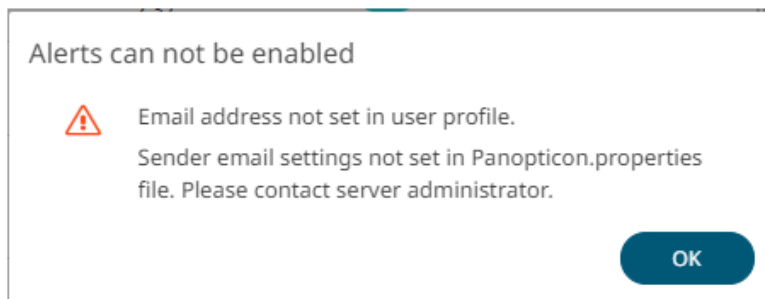
## [2] ALERTING

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.

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

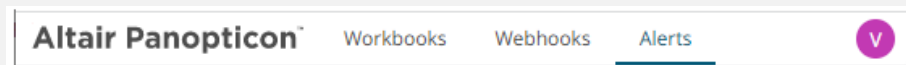
Alert definition can be done by right-clicking on a streaming numeric data in a visualization in the Web client and setting the limits, duration, what will be included, how many and when an email will be sent.

### NOTE

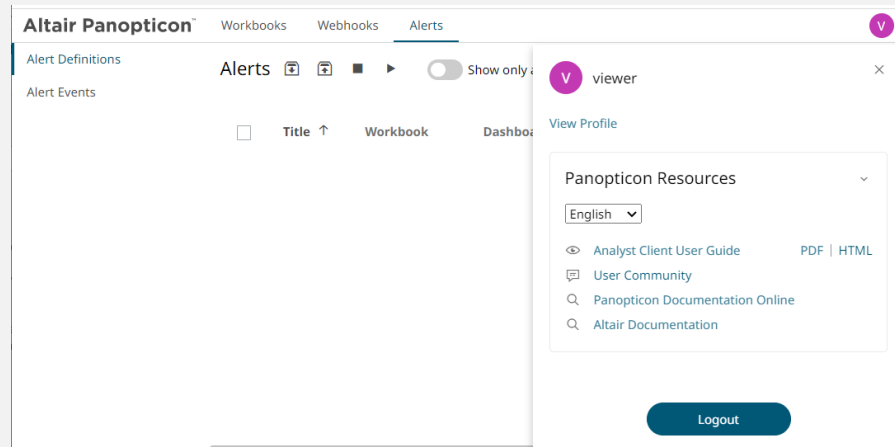
Before setting up the visualization alert, enter the email of the user or group who will receive the alert on the *User Profile*:

#### Steps:

1. On the toolbar, click .

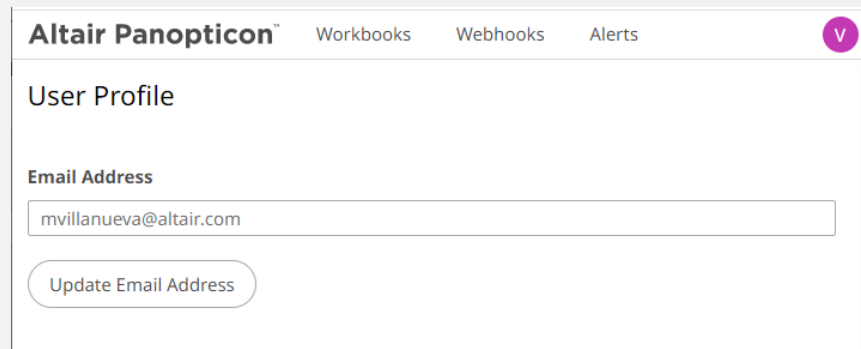


The drop-down menu displays.

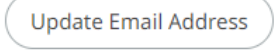


2. Click *View Profile*.

The *User Profile* page displays.

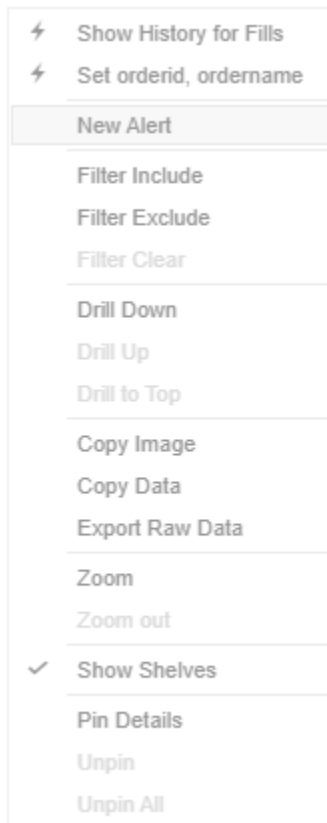


3. Enter the *Email Address*.

4. Click .

**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.

Alert for Visual > Order Map Activated

Name

Description

Variable	Condition		Limit
<input type="text" value="arrivaltoorderwap"/>	<input type="text" value="WeightedMean(arrivaltoorderwap,usdunfilledvalue)"/>	<input "="" type="text" value="&lt;="/>	<input type="text" value=""/>
<input type="text" value="usdunfilledvalue"/>	<input type="text" value="Sum(usdunfilledvalue)"/>	<input "="" type="text" value="&lt;="/>	<input type="text" value=""/>
<input type="text" value="orderdurationminutes"/>	<input type="text" value="Sum(orderdurationminutes)"/>	<input "="" type="text" value="&lt;="/>	<input type="text" value=""/>
<input type="text" value="fills"/>	<input type="text" value="Sum(fills)"/>	<input "="" type="text" value="&lt;="/>	<input type="text" value=""/>
<input type="text" value="algotype"/>	<input type="text" value="TextUnique(algotype)"/>	<input type="text" value="Equals"/>	<input type="text" value="Oppo"/>
<input type="text" value="algoname"/>	<input type="text" value="TextUnique(algoname)"/>	<input type="text" value="Equals"/>	<input type="text" value="Pairs"/>

For the last

Breakdown

Parameters

Action Limit

Send E-mail   Include    Use current drill path

CC

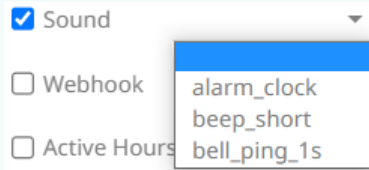
Sound

Webhook

Active Hours

2. Enter or select the following properties:

Property	Description
Name	Name of the alert.
Description	Description of the alert.
Variable	Available variable columns in the visualization where the alert is set.
Condition	Allows setting the following <i>Limit</i> of all the available numeric variables in the visualization: <ul style="list-style-type: none"> <li>Upper or Equal To (&lt;=)</li> <li>Lower or Equal To (&gt;=)</li> </ul>

	<ul style="list-style-type: none"> <li>• Upper values (&lt;)</li> <li>• Lower values (&gt;)</li> <li>• Between – values between the <i>Lower</i> and <i>Upper</i> values</li> </ul> <p>For text variables, there are four types of conditions:</p> <ul style="list-style-type: none"> <li>• Equals - The string is equal to another string, e.g., Country=Sweden</li> <li>• Not Equals – The string is not equal to another string</li> <li>• Wildcard: The string matches a wildcard expression, e.g., Country=Norwa* would match Country=Norway</li> <li>• Regex: The string matches a regex expression, e.g., Country= [a-zA-Z]+a would match Country=India and Country=Indonesia</li> </ul>
For the Last	<p>Checks if a value has reached the limit on the set Date/Time unit:</p> <ul style="list-style-type: none"> <li>• second(s)</li> <li>• minute(s)</li> <li>• hour(s)</li> <li>• day(s)</li> </ul>
Breakdown	Current breakdown of the visualization.
Parameters	Available parameters in the visualization.
Action Limit	<p>The maximum number of times an alert will be sent on the set Date/Time unit:</p> <ul style="list-style-type: none"> <li>• second(s)</li> <li>• minute(s)</li> <li>• hour(s)</li> <li>• day(s)</li> </ul>
Send E-mail	<p>Determines when an alert email will be sent:</p> <ul style="list-style-type: none"> <li>• on enter</li> <li>• on leave</li> <li>• on enter/leave</li> </ul> <p>If unchecked, the notification will only be displayed on the Web client.</p>
Include	<p>Determines whether the image of the visualization or dashboard will be included in the alert email.</p> <p>For the included image of the visualization, check the <b>Use current drill path</b> box to generate a drilled image in the email.</p>
CC	CC mailing groups that will receive the alerts, separated by a comma
Sound	<p>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).</p>  <p>Default is <b>None</b>.</p>

<a href="#">Webhook</a>	Webhooks that will be 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:

Alert for Visual > Order Map Activated

Name

Description

Variable	Condition	Limit
<input type="text" value="arrivaltoorderwap"/>	<input type="text" value="WeightedMean(arrivaltoorderwap,usdunfilledvalue)"/>	<input type="text" value="&lt;="/> <input type="text" value=""/>
<input type="text" value="usdunfilledvalue"/>	<input type="text" value="Sum(usdunfilledvalue)"/>	<input type="text" value="&lt;="/> <input type="text" value=""/>
<input type="text" value="orderdurationminutes"/>	<input type="text" value="Sum(orderdurationminutes)"/>	<input type="text" value="&lt;="/> <input type="text" value=""/>
<input type="text" value="fills"/>	<input type="text" value="Sum(fills)"/>	<input type="text" value="&lt;="/> <input type="text" value="50"/>
<input type="text" value="algotype"/>	<input type="text" value="TextUnique(algotype)"/>	<input type="text" value="Equals"/> <input type="text" value="Oppo"/>
<input type="text" value="algoname"/>	<input type="text" value="TextUnique(algoname)"/>	<input type="text" value="Equals"/> <input type="text" value="Liquic"/>
<input type="text" value="sym"/>	<input type="text" value="TextUnique(sym)"/>	<input type="text" value="Equals"/> <input type="text" value="O129i"/>

For the last

Breakdown

Parameters

Action Limit  per

Send E-mail   Include    Use current drill path

CC

Sound

Webhook

Active Hours

from  to

MONDAY
  TUESDAY
  WEDNESDAY
  THURSDAY
  FRIDAY
  SATURDAY
  SUNDAY

Show in Timezone

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

- To modify the *Active Hours*, click  .

The *Clock* settings display.

09	00	AM
10	01	PM
11	02	
12	03	
01	04	
02	05	
03	06	

- Select the *Hour*, *Minutes*, and *AM/PM* settings.
- To modify the *Active Days*, check the boxes of the desired days.
- 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.



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

- Click  . The new alert is added on the *Alerts* page.

#### NOTE

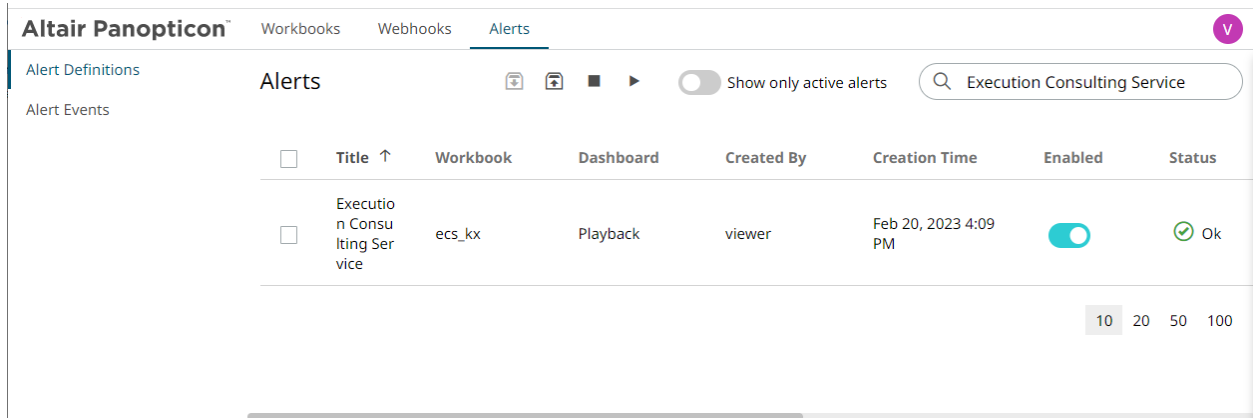
When creating alerts for grand total, ensure that no breakdown is set.

## 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

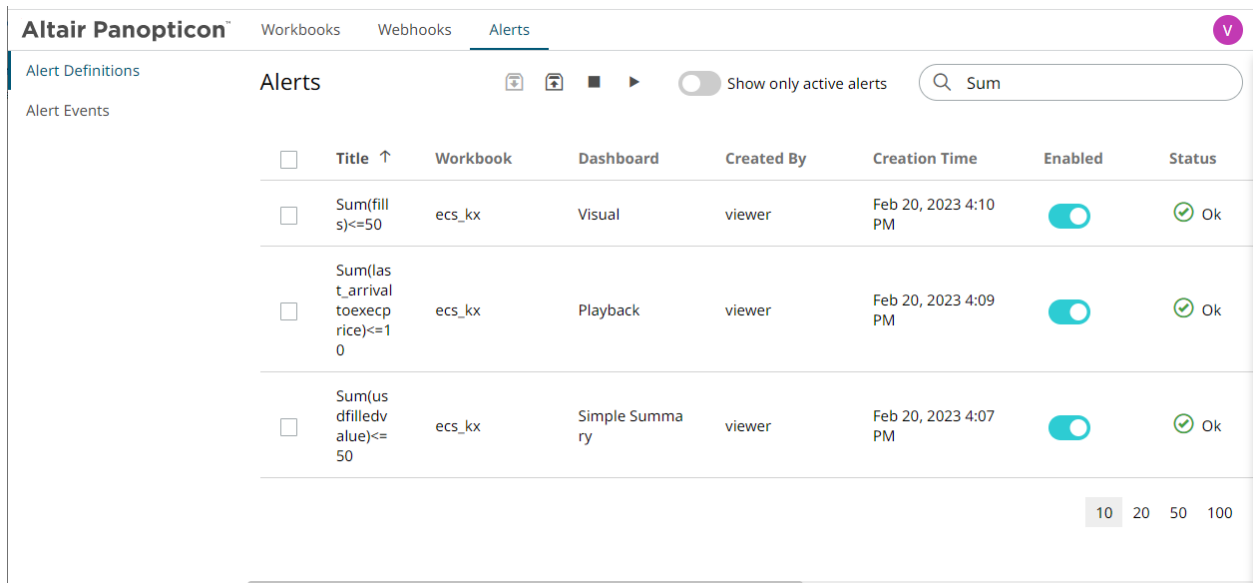
To search for a particular alert, enter it in the *Search* box.



The screenshot shows the Altair Panopticon Alerts page. The search bar contains the text "Execution Consulting Service". The table below shows one alert:

<input type="checkbox"/>	Title ↑	Workbook	Dashboard	Created By	Creation Time	Enabled	Status
<input type="checkbox"/>	Execution Consulting Service	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>	Ok

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



The screenshot shows the Altair Panopticon Alerts page with the search bar containing "Sum". The table below shows three alerts:

<input type="checkbox"/>	Title ↑	Workbook	Dashboard	Created By	Creation Time	Enabled	Status
<input type="checkbox"/>	Sum(fill s)<=50	ecs_kx	Visual	viewer	Feb 20, 2023 4:10 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(last_arrival toexecption)<=10	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(used value)<=50	ecs_kx	Simple Summary	viewer	Feb 20, 2023 4:07 PM	<input checked="" type="checkbox"/>	Ok

## Enabling Alerts on the Alerts Page

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



Altair Panopticon™ Workbooks Webhooks Alerts V

Alert Definitions Alert Events

Alerts 🔍 Search alerts Show only active alerts

<input type="checkbox"/>	Title ↑	Workbook	Dashboard	Created By	Creation Time	Enabled	Status
<input type="checkbox"/>	Execution Consulting Service	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(fill s)<=50	ecs_kx	Visual	viewer	Feb 20, 2023 4:10 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(last_arrival toexecption)<=10	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(usedfilledvalue)<=50	ecs_kx	Simple Summary	viewer	Feb 20, 2023 4:07 PM	<input type="checkbox"/>	Unknown

10 20 50 100

Altair Panopticon™ Workbooks Webhooks Alerts V

Alert Definitions Alert Events

Alerts 🔍 Search alerts Show only active alerts

<input type="checkbox"/>	Title ↑	Workbook	Dashboard	Created By	Creation Time	Enabled	Status
<input type="checkbox"/>	Execution Consulting Service	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(fill s)<=50	ecs_kx	Visual	viewer	Feb 20, 2023 4:10 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(last_arrival toexecption)<=10	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>	Ok
<input type="checkbox"/>	Sum(usedfilledvalue)<=50	ecs_kx	Simple Summary	viewer	Feb 20, 2023 4:07 PM	<input checked="" type="checkbox"/>	Unknown

10 20 50 100

## Displaying Active Alerts

Tap the **Show only active alerts** slider to turn it on.

The screenshot shows the Altair Panopticon interface with the 'Alerts' tab selected. The 'Show only active alerts' slider is turned off. The table displays five alerts:

<input type="checkbox"/>	Title ↑	Workbook	Dashboard	Created By	Creation Time	Enabled
<input type="checkbox"/>	Execution Consulting Service	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sum(fill_s)<=50	ecs_kx	Visual	viewer	Feb 20, 2023 4:10 PM	<input type="checkbox"/>
<input type="checkbox"/>	Sum(last_arrival_to_exception)<=10	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sum(usedfilledvalue)<=50	ecs_kx	Simple Summary	viewer	Feb 20, 2023 4:07 PM	<input type="checkbox"/>

Only the active or enabled alerts are displayed on the *Alerts* tab.

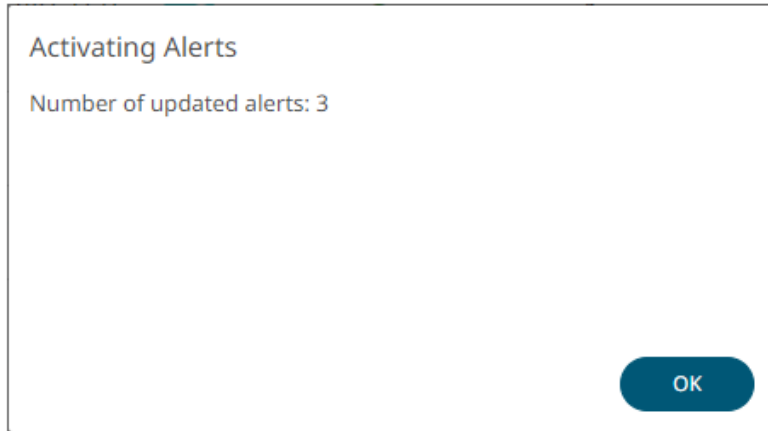
The screenshot shows the Altair Panopticon interface with the 'Alerts' tab selected. The 'Show only active alerts' slider is turned on. The table displays only two alerts:

<input type="checkbox"/>	Title ↑	Workbook	Dashboard	Created By	Creation Time	Enabled
<input type="checkbox"/>	Execution Consulting Service	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sum(last_arrival_to_exception)<=10	ecs_kx	Playback	viewer	Feb 20, 2023 4:09 PM	<input checked="" type="checkbox"/>

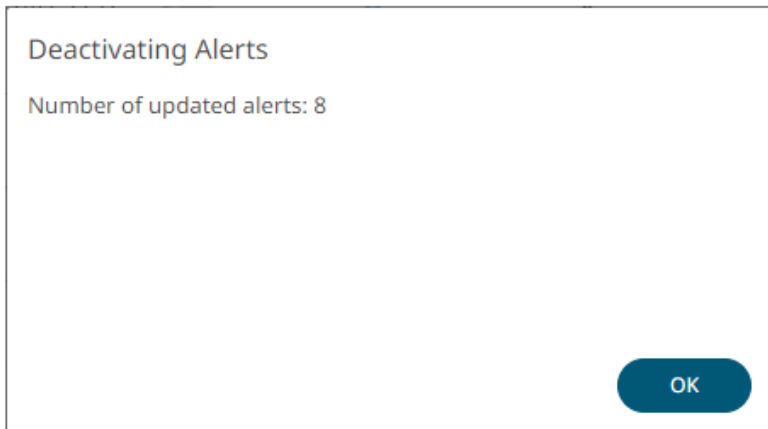
## Activating or Deactivating All Alerts

Alerts can be activated or deactivated in one click.

To activate all deactivated alerts, click **Activate All** . All of the deactivated alerts are activated.



To deactivate all activated alerts, click **Deactivate All** . All of the activated alerts are deactivated.




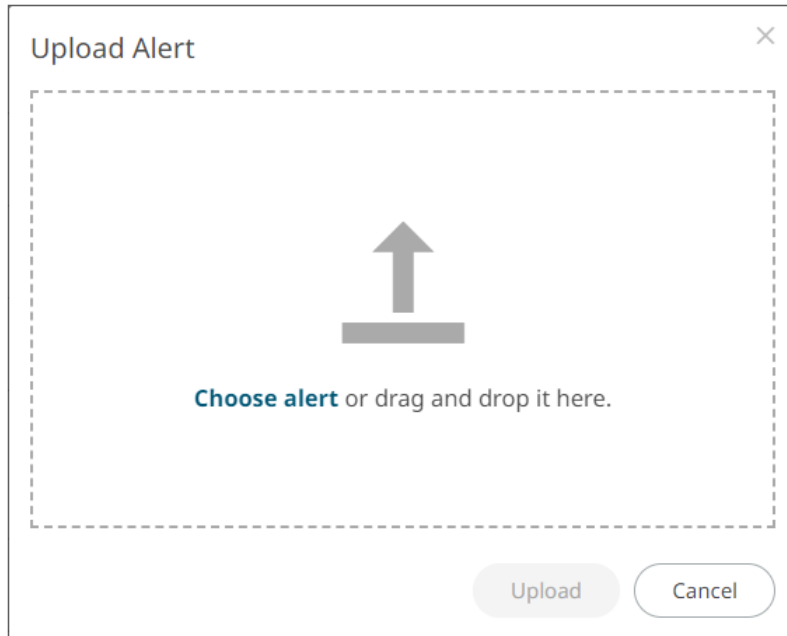
Click  to close the dialog.

## Importing Alerts


Allows you to import alerts shared by other others.

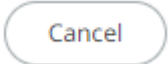
### Steps:

1. On the **Alert Definitions** tab, click the **Import Alerts**  icon.  
The *Upload Alert* dialog displays.



1. To upload an alert, do one of the following:
  - Drag the file from your desktop and drop on the dialog, or
  - Click **Choose alert** and then browse and select one on the *Open* dialog that displays.


2. Click  .  
A notification displays once the color palettes file is uploaded.

Click  to close the dialog. The uploaded color palette is added in the list.

## Exporting Alerts


You can download a copy of any of the alerts.

### Steps:

1. On the *Alerts* list, select the checkbox of the alerts you want to export.
2. Click **Export Alerts**  icon.  
The selected alerts are downloaded.

## 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.


- Click an alert to modify.  
The *Alerts* dialog displays with the status.
- Make the necessary changes then click **OK** to save them.

## Deleting Alerts

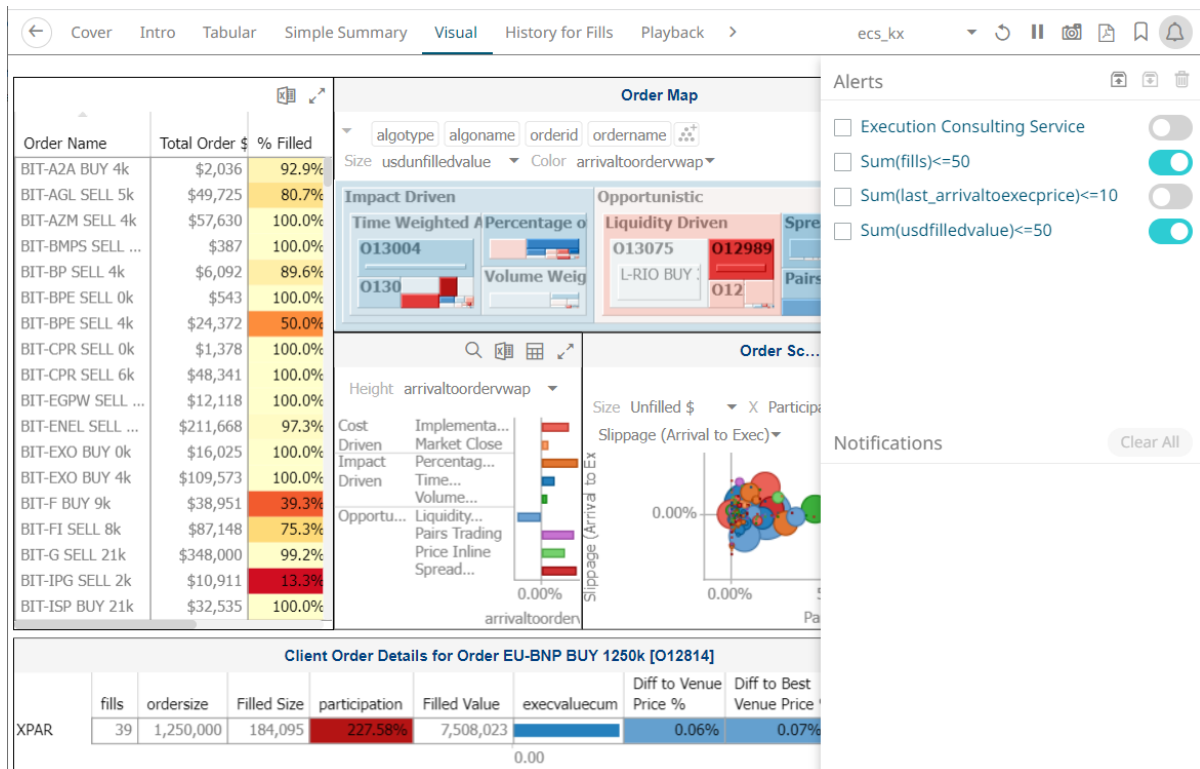
Alerts can be deleted on:

- The Alerts panel
- An Alerts dialog
- The Alerts tab

### Deleting Alerts on the Alerts Panel:

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

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




The screenshot shows the Altair Panopticon interface. The top navigation bar includes tabs like Cover, Intro, Tabular, Simple Summary, Visual, History for Fills, and Playback. The main workspace is divided into several panels:

- Order Map:** Displays a list of orders with columns for Order Name, Total Order \$, and % Filled. The list includes orders like BIT-A2A BUY 4k, BIT-AGL SELL 5k, etc.
- Order Summary:** Shows a bar chart for 'Slippage (Arrival to Exec)' and a table for 'Client Order Details for Order EU-BNP BUY 1250k [O12814]'. The table has columns for fills, ordersize, Filled Size, participation, Filled Value, execvaluecum, Diff to Venue Price %, and Diff to Best Venue Price %.
- Alerts Panel (Right):** A panel titled 'Alerts' with a list of alerts and checkboxes. The alerts include:
  - Execution Consulting Service (toggle off)
  - Sum(fills)<=50 (toggle on)
  - Sum(last\_arrivaltoexecprice)<=10 (toggle off)
  - Sum(usdfilledvalue)<=50 (toggle on)
- Notifications:** A section at the bottom right with a 'Clear All' button.

- 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:

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

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

The screenshot shows the Altair Panopticon interface with the 'Visual' tab selected. The main window displays a table of orders and their fill percentages, an 'Order Map' section with various filters and charts, and an 'Alerts' dialog on the right. The 'Alerts' dialog has four items: 'Execution Consulting Service' (disabled), 'Sum(fills)<=50' (enabled), 'Sum(last\_arrivaltoexecprice)<=10' (disabled), and 'Sum(usdfilledvalue)<=50' (enabled). Below the alerts is a 'Notifications' section with a 'Clear All' button.

Order Name	Total Order \$	% Filled
BIT-A2A BUY 4k	\$2,036	92.9%
BIT-AGL SELL 5k	\$49,725	80.7%
BIT-AZM SELL 4k	\$57,630	100.0%
BIT-BMPS SELL ...	\$387	100.0%
BIT-BP SELL 4k	\$6,092	89.6%
BIT-BPE SELL 0k	\$543	100.0%
BIT-BPE SELL 4k	\$24,372	50.0%
BIT-CPR SELL 0k	\$1,378	100.0%
BIT-CPR SELL 6k	\$48,341	100.0%
BIT-EGPW SELL ...	\$12,118	100.0%
BIT-ENEL SELL ...	\$211,668	97.3%
BIT-EXO BUY 0k	\$16,025	100.0%
BIT-EXO BUY 4k	\$109,573	100.0%
BIT-F BUY 9k	\$38,951	39.3%
BIT-FI SELL 8k	\$87,148	75.3%
BIT-G SELL 21k	\$348,000	99.2%
BIT-IPG SELL 2k	\$10,911	13.3%
BIT-ISP BUY 21k	\$32,535	100.0%

Client Order Details for Order EU-BNP BUY 1250k [O12814]								
	fills	ordersize	Filled Size	participation	Filled Value	execvaluecum	Diff to Venue Price %	Diff to Best Venue Price
XPAR	39	1,250,000	184,095	227.58%	7,508,023		0.06%	0.07%
						0.00		

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.

Altair Panopticon™ Workbooks Webhooks Alerts V

Alert Definitions

Alert Events

Status	Times Triggered	Sent Emails	Notifications	Triggered Webhooks	
✔ Ok	0 0 today	0 0 today	0 0 today	0 0 today	
✔ Ok	2 2 today	0 0 today	0 0 today	0 0 today	
✔ Ok	2 2 today	0 0 today	0 0 today	0 0 today	
✔ Ok	0 0 today	0 0 today	0 0 today	0 0 today	

- Click the  of an alert to delete.  
A confirmation message displays.

Are you sure you want to delete this alert?

Yes
No


- Click **Yes**.

## Enabling Alerts

Alerts can be enabled either on:

- the Alerts panel
- an Alerts dialog

### Enabling Alerts on the Alerts Panel:

- Open a workbook with an alert and click on the **Alerts**  icon.  
The *Alerts* panel displays with the list of alerts.

The screenshot displays the Altair Panopticon interface with the following components:


- Navigation Bar:** Cover, Intro, Tabular, Simple Summary, **Visual**, History for Fills, Playback.
- Order List Table:**

Order Name	Total Order \$	% Filled
BIT-A2A BUY 4k	\$2,036	92.9%
BIT-AGL SELL 5k	\$49,725	80.7%
BIT-AZM SELL 4k	\$57,630	100.0%
BIT-BMPS SELL ...	\$387	100.0%
BIT-BP SELL 4k	\$6,092	89.6%
BIT-BPE SELL 0k	\$543	100.0%
BIT-BPE SELL 4k	\$24,372	50.0%
BIT-CPR SELL 0k	\$1,378	100.0%
BIT-CPR SELL 6k	\$48,341	100.0%
BIT-EGPW SELL ...	\$12,118	100.0%
BIT-ENEL SELL ...	\$211,668	97.3%
BIT-EXO BUY 0k	\$16,025	100.0%
BIT-EXO BUY 4k	\$109,573	100.0%
BIT-F BUY 9k	\$38,951	39.3%
BIT-FI SELL 8k	\$87,148	75.3%
BIT-G SELL 21k	\$348,000	99.2%
BIT-IPG SELL 2k	\$10,911	13.3%
BIT-ISP BUY 21k	\$32,535	100.0%
- Order Map:**
  - Filters: algotype, algoname, orderid, ordername
  - Size: usdunfilledvalue, Color: arrivaltoorderwarp
  - Impact Driven: Time Weighted A Percentage of (O13004, O130), Volume Weig
  - Opportunistic: Liquidity Driven (O13075, O12989, L-RIO BUY, O12)
- Order Sc...:**
  - Height: arrivaltoorderwarp
  - Size: Unfilled \$, X Participa
  - Slippage (Arrival to Exec): 0.00%
- Client Order Details for Order EU-BNP BUY 1250k [O12814]:**

	fills	ordersize	Filled Size	participation	Filled Value	execvaluecum	Diff to Venue Price %	Diff to Best Venue Price
XPAR	39	1,250,000	184,095	227.58%	7,508,023		0.06%	0.07%
- Alerts Panel:**
  - Execution Consulting Service:
  - Sum(fills)<=50:
  - Sum(last\_arrivaltoexecprice)<=10:
  - Sum(usdfilledvalue)<=50:
- Notifications:** Clear All

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.



The screenshot displays the Altair Panopticon interface. At the top, a navigation bar includes tabs for Cover, Intro, Tabular, Simple Summary, Visual (selected), History for Fills, and Playback. The main area is divided into several sections:

- Order Map:** A table listing orders with columns for Order Name, Total Order \$, and % Filled. Orders include BIT-A2A BUY 4k (92.9% filled), BIT-AGL SELL 5k (80.7%), BIT-AZM SELL 4k (100.0%), BIT-BMPS SELL ... (\$387, 100.0%), BIT-BP SELL 4k (\$6,092, 89.6%), BIT-BPE SELL 0k (\$543, 100.0%), BIT-BPE SELL 4k (\$24,372, 50.0%), BIT-CPR SELL 0k (\$1,378, 100.0%), BIT-CPR SELL 6k (\$48,341, 100.0%), BIT-EGPW SELL ... (\$12,118, 100.0%), BIT-ENEL SELL ... (\$211,668, 97.3%), BIT-EXO BUY 0k (\$16,025, 100.0%), BIT-EXO BUY 4k (\$109,573, 100.0%), BIT-F BUY 9k (\$38,951, 39.3%), BIT-FI SELL 8k (\$87,148, 75.3%), BIT-G SELL 21k (\$348,000, 99.2%), BIT-IPG SELL 2k (\$10,911, 13.3%), and BIT-ISP BUY 21k (\$32,535, 100.0%).
- Order Map Visualizations:** Includes an 'Order Map' section with filters for algotype, algoname,orderid, and ordername. It features two charts: 'Impact Driven' (Time Weighted % Percentage of Volume Weig) and 'Opportunistic' (Liquidity Driven). Below these are 'Order Sc...' and 'Client Order Details for Order EU-BNP BUY 1250k [O12814]'.
- Client Order Details:** A table with columns: fills, ordersize, Filled Size, participation, Filled Value, execvaluecum, Diff to Venue Price %, and Diff to Best Venue Price. The row for XPAR shows 39 fills, 1,250,000 ordersize, 184,095 Filled Size, 227.58% participation, 7,508,023 Filled Value, 0.00 execvaluecum, 0.06% Diff to Venue Price %, and 0.07% Diff to Best Venue Price.
- Alerts Dialog:** Located on the right, it lists several alert conditions with toggle switches:
  - Execution Consulting Service: Off
  - Sum(fills)<=50: On
  - Sum(last\_arrivaltoexecprice)<=10: Off
  - Sum(usdfilledvalue)<=50: On
- Notifications:** A section with a 'Clear All' button.

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.

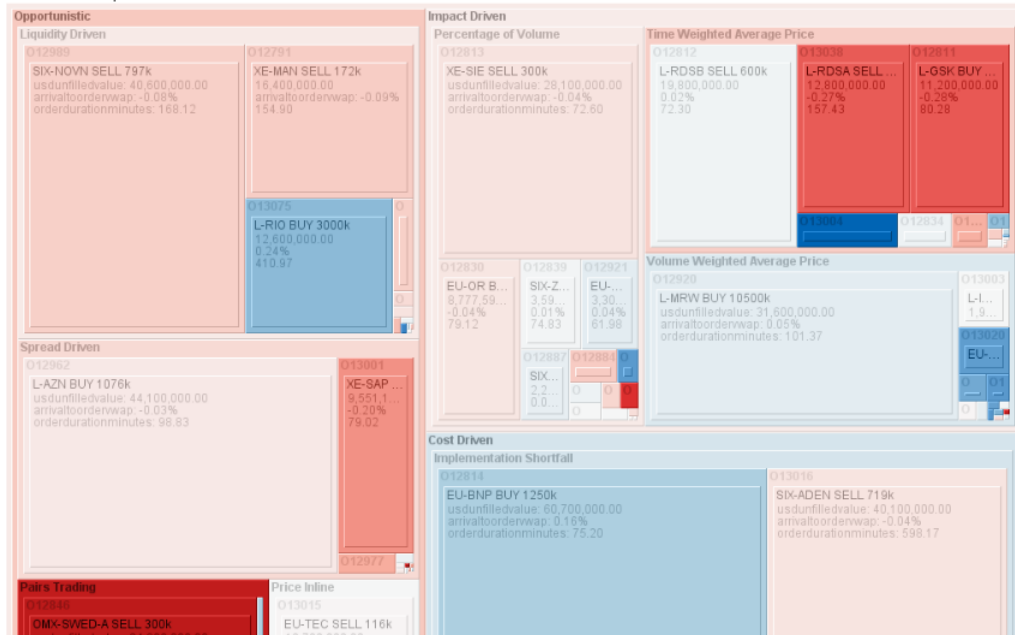
Dashboard: [http://localhost:8080/panopticon/workbook/#/ecs\\_kx/Visual](http://localhost:8080/panopticon/workbook/#/ecs_kx/Visual)

Condition: Sum(fills) >= 10.0

The alert was triggered by the following items:

algotype:Opportunistic, algoname:Liquidity Driven, sym:O12989, ordername:SIX-NOVN SELL 797k

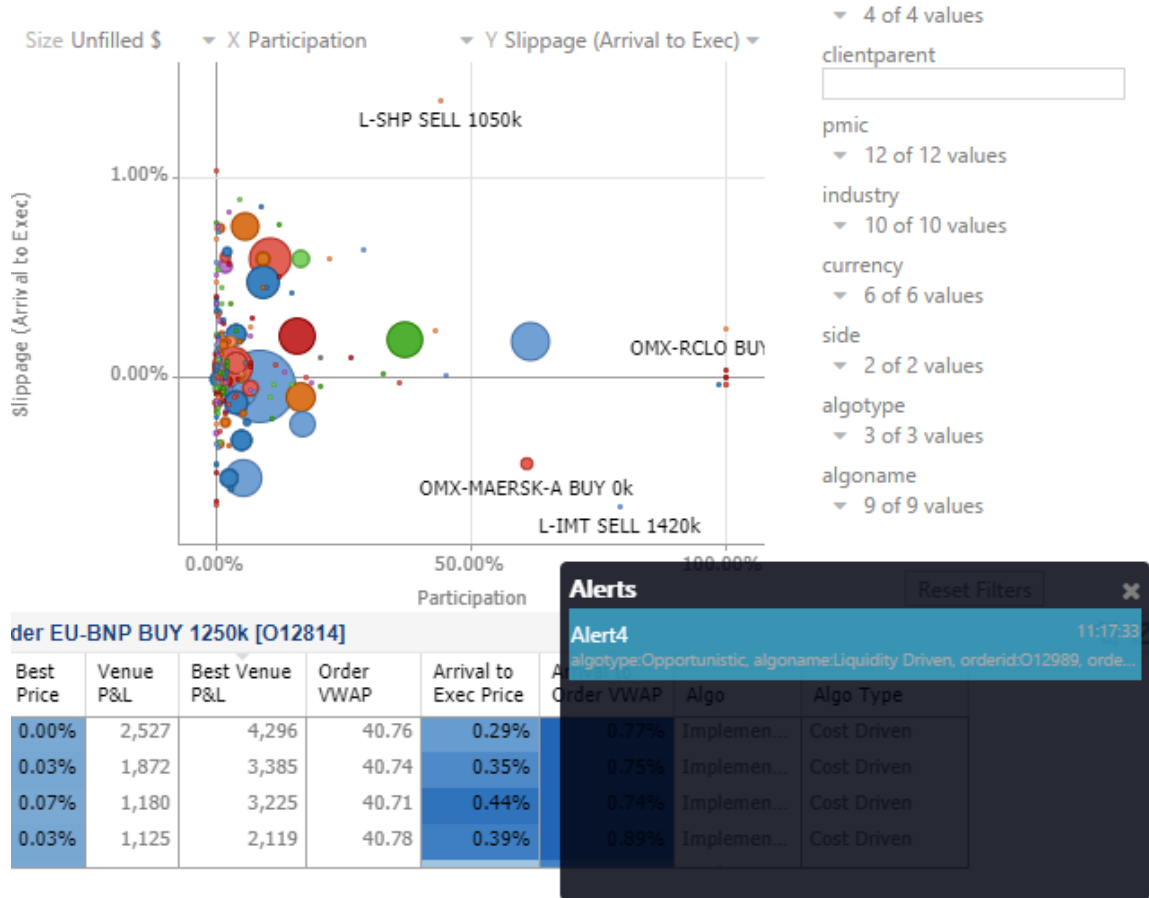
Visual > Order Map



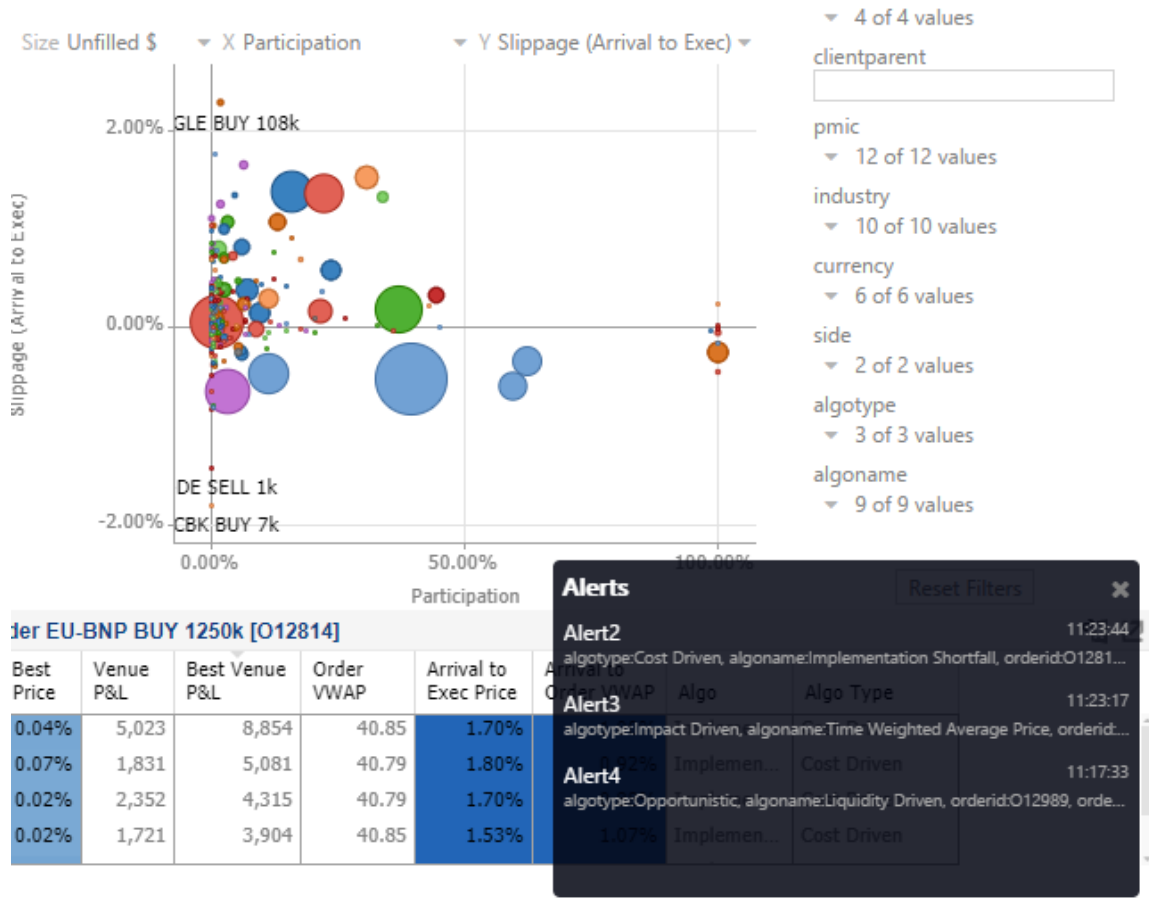
## Sample Web Client Alerts

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:

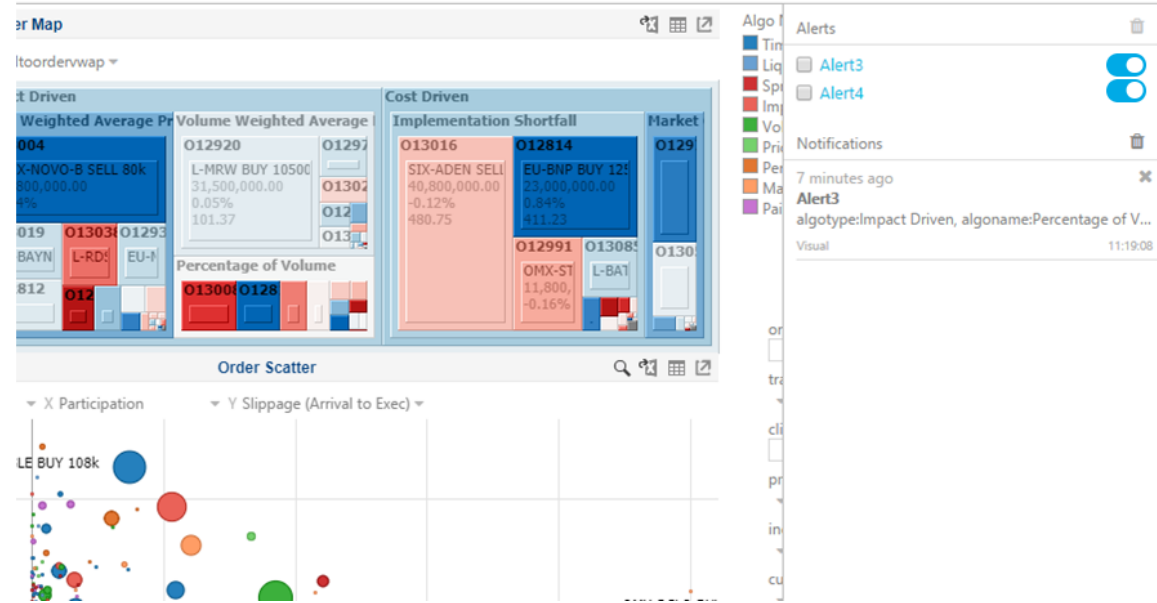


The alert eventually fades away and the pop-up screen fills up with the four latest triggered alerts.

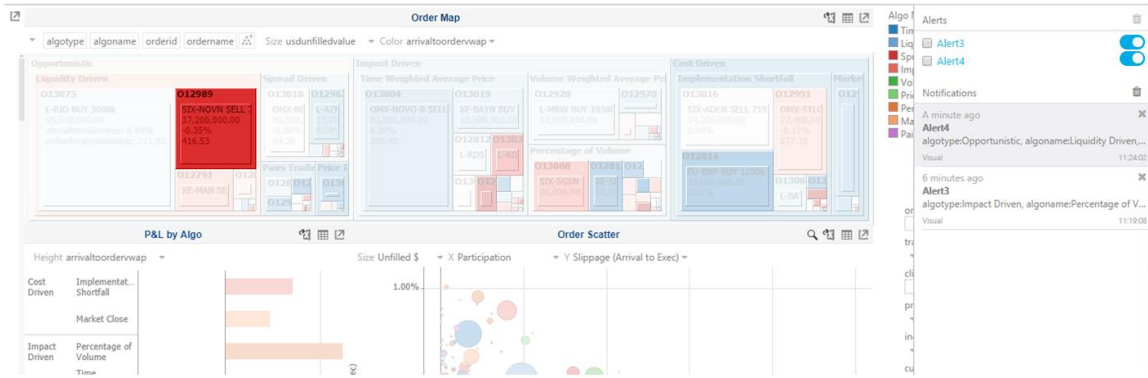




The pop-up stays on screen until it is closed by clicking the button.

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.

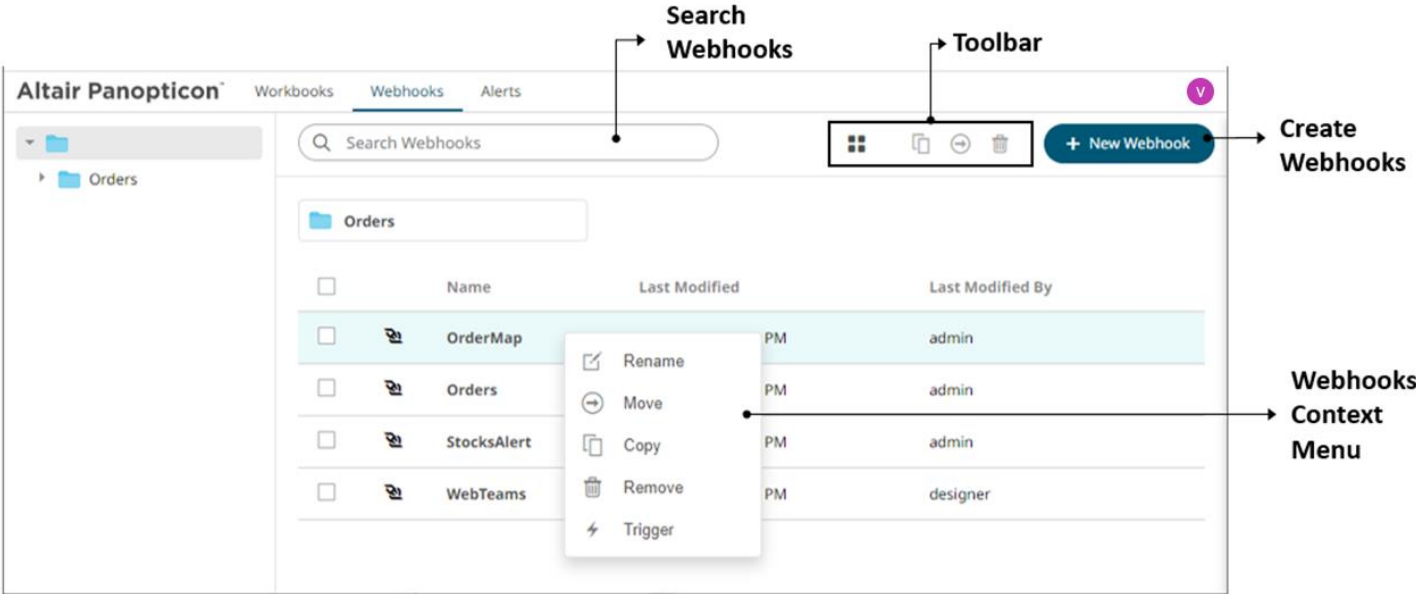
# [3] WEBHOOKS

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 publicly, 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 webhooks. 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.

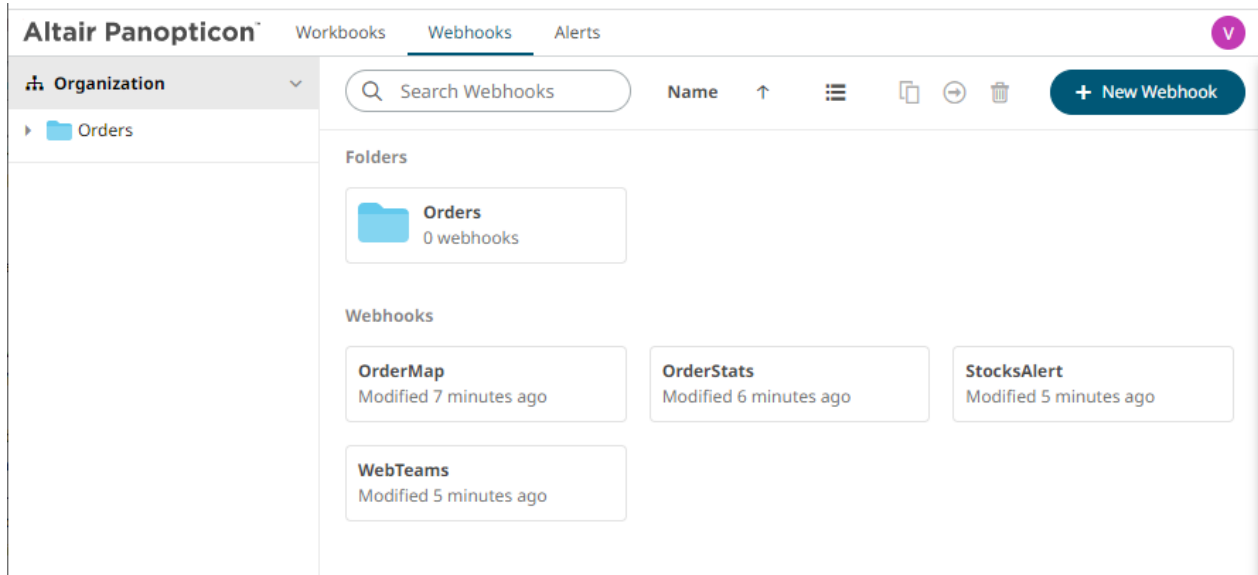



Property	Description
<a href="#">Search Webhooks</a>	Entering text will filter the webhooks.
<a href="#">Toolbar</a>	Allows copying, moving, and removing of webhooks. Also, to display the webhooks list either on <a href="#">List View</a> or <a href="#">Grid View</a> .
<a href="#">Create Webhooks</a>	Allows creating new webhooks.
<a href="#">Webhooks Context Menu</a>	Allows <a href="#">renaming</a> , <a href="#">moving</a> , <a href="#">copying</a> , <a href="#">deleting</a> , and enabling of the trigger of webhooks.

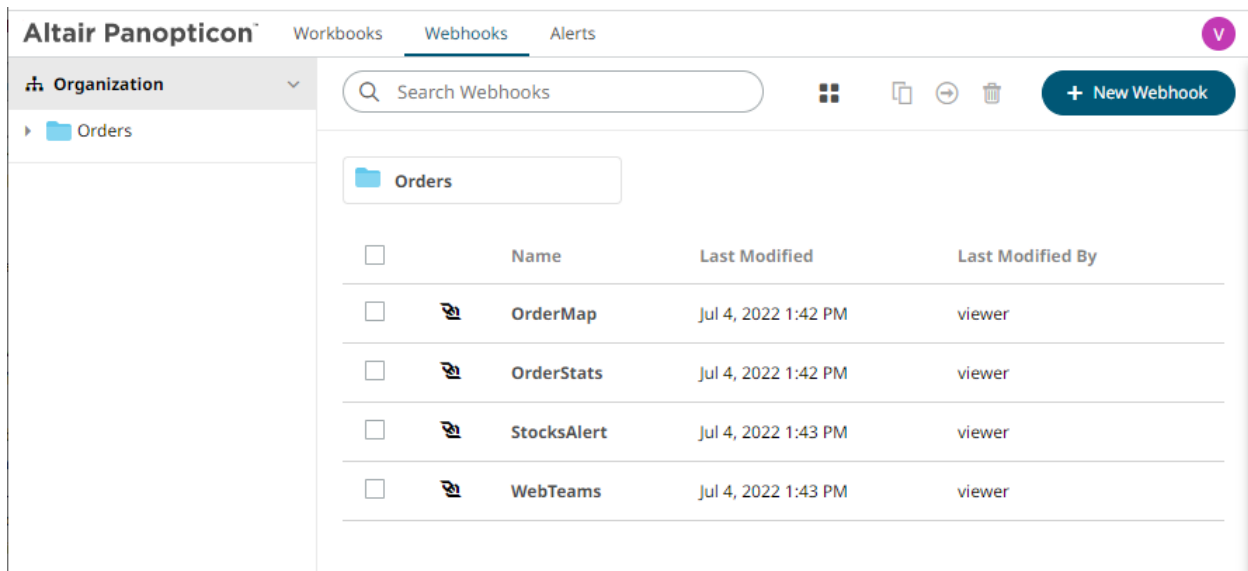
## Folders and Webhooks Display View

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.



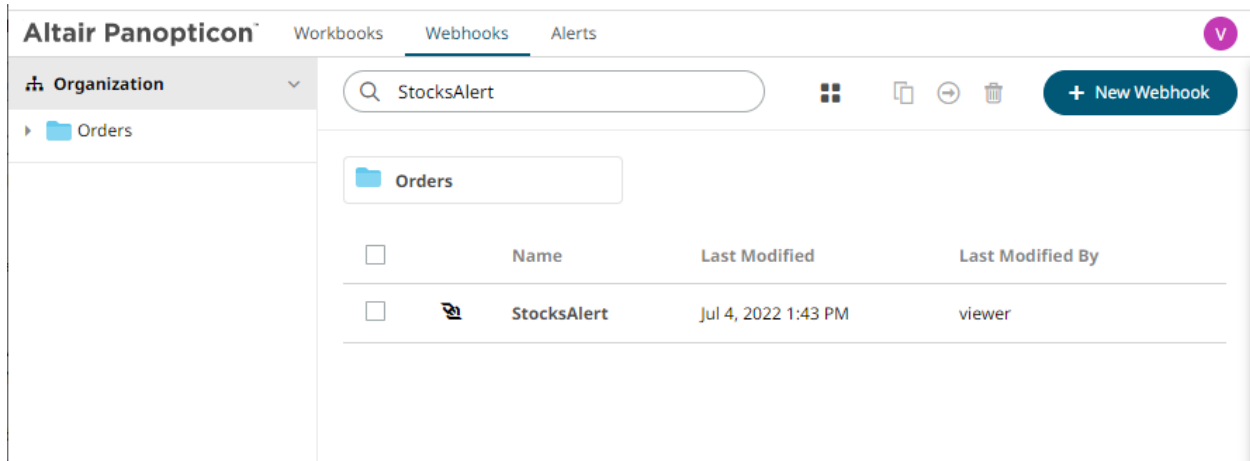
Or click **List View** , the folders and webhooks are displayed in a standard listing.



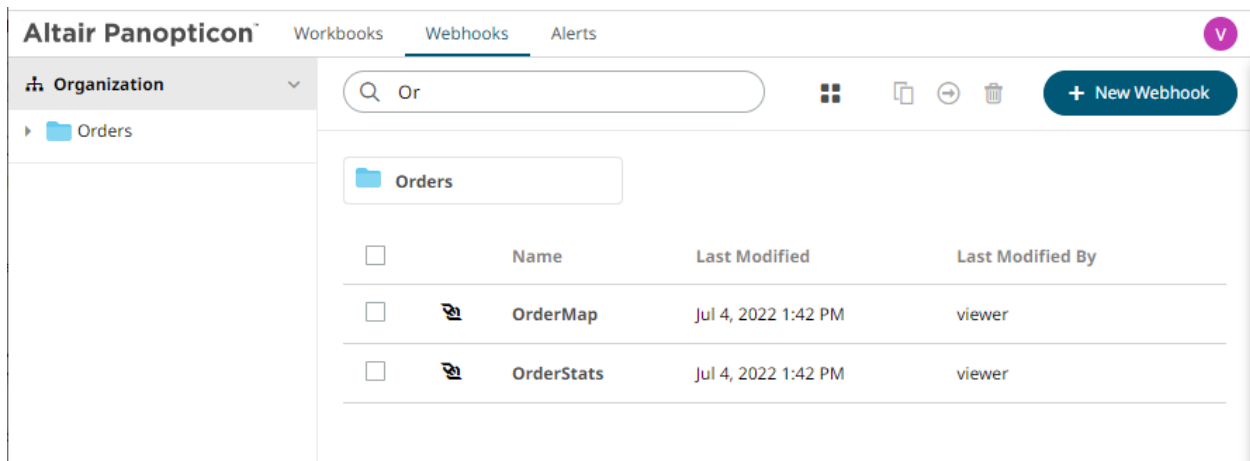
On either display view style, clicking on a webhooks title or thumbnail displays the *Webhooks* page.

## 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 or 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.

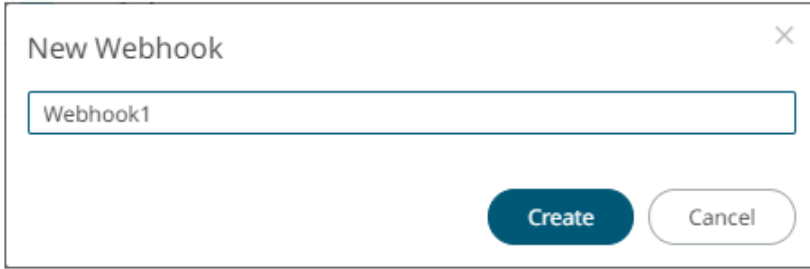
## CREATING WEBHOOKS

This section discusses the instructions and guidelines in creating webhooks.

### Steps:


1. On the **Webhooks** tab, click on a folder then . The *New Webhook* dialog displays.

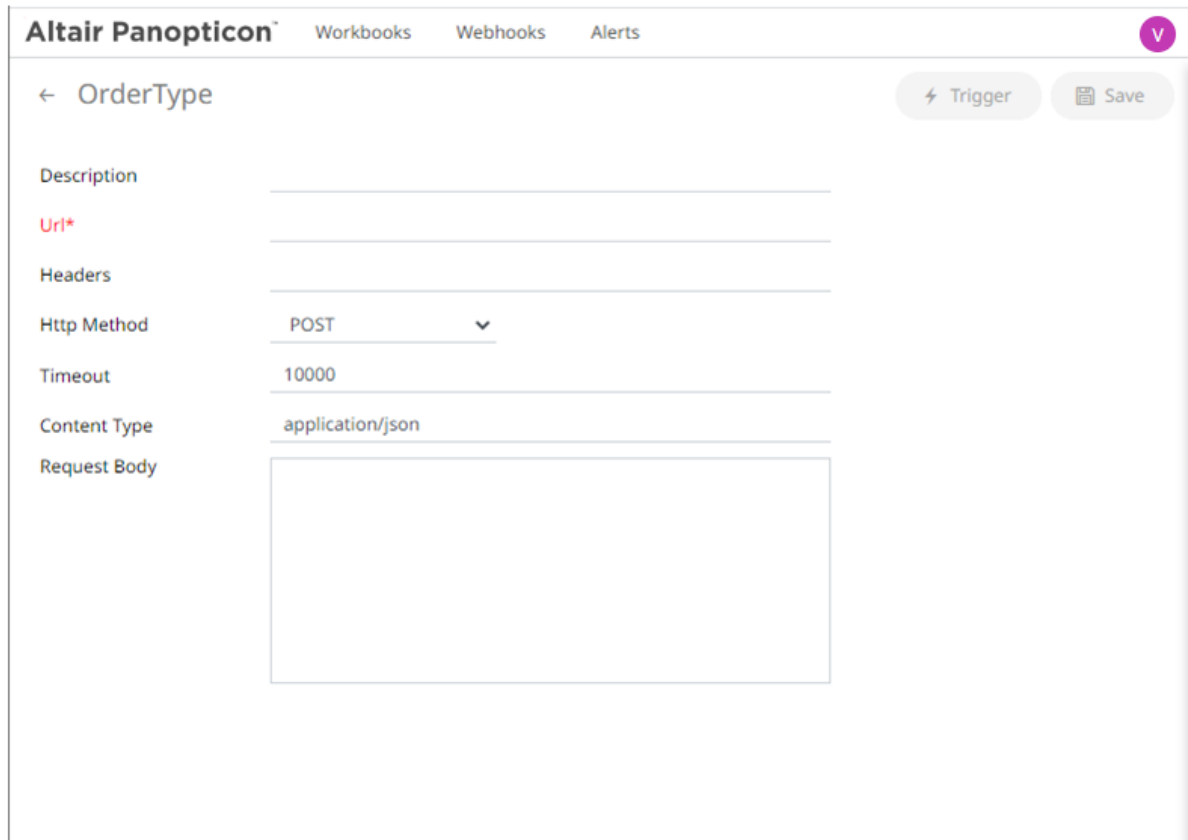




A dialog box titled "New Webhook" with a close button (X) in the top right corner. It contains a text input field with the text "Webhook1" and two buttons at the bottom: "Create" (a dark blue button) and "Cancel" (a light blue button).



2. Enter the name of the webhook then click  .  
The new webhook is displayed on the *Webhook* page.



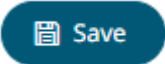


The Altair Panopticon interface showing the configuration for a webhook named "OrderType". The top navigation bar includes "Altair Panopticon", "Workbooks", "Webhooks", and "Alerts", along with a user profile icon. The page has a back arrow and the name "OrderType". On the right, there are "Trigger" and "Save" buttons. The configuration fields are:
 

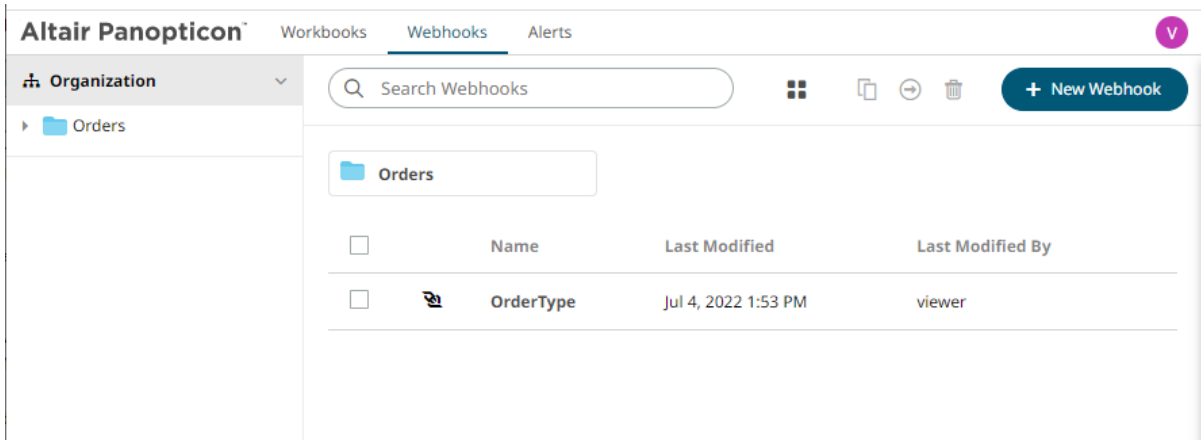
- Description:
- Url\*:
- Headers:
- Http Method: POST (dropdown menu)
- Timeout: 10000
- Content Type: application/json
- Request Body:

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:

	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <div style="background-color: #007bff; color: white; padding: 2px 5px; display: inline-block;">GET</div> <ul style="list-style-type: none"> <li style="background-color: #007bff; color: white; padding: 2px 5px; margin-bottom: 2px;">GET</li> <li style="padding: 2px 5px; margin-bottom: 2px;">POST</li> <li style="padding: 2px 5px; margin-bottom: 2px;">PUT</li> <li style="padding: 2px 5px;">DELETE</li> </ul> </div> <ul style="list-style-type: none"> <li>• GET – retrieve data</li> <li>• POST – add new data</li> <li>• PUT – replace existing data</li> <li>• DELETE – remove existing data</li> </ul>
Timeout	Timeout (in ms) for reading a response from the URL.
Content Type	The content type of the request body. Default is <b>application/json</b> .
Request Body	<p>The request body to be supplied to the HTTP call.</p> <p>For example:</p> <pre>{   '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}' }</pre>

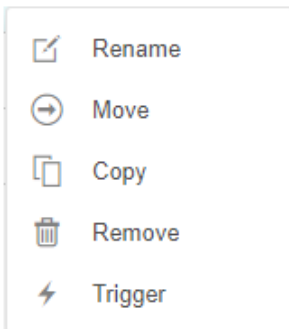
4. Click  to save the new webhook.
5. You may opt to click  to trigger the webhook. Any parameter in the request body will be replaced by its value when triggering the webhook request.  
For example:  
`{_current_time}` - 2021-07-01T12:34:56Z
6. Click  to go back to the *Folders and Webhooks* list. The new webhook is added on the list.



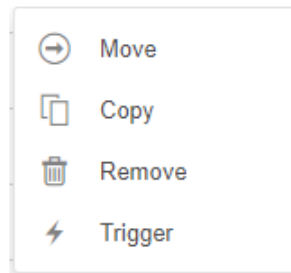
## WEBHOOKS TOOLBAR AND CONTEXT MENU

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
<a href="#">Sort By / Sort Order</a>	Allows sorting webhooks by <i>Name</i> , <i>Last Modified</i> , or <i>Last Modified By</i> .
<a href="#">Display View</a>	Display webhooks either by <i>List View</i> or <i>Grid View</i> .
<a href="#">Copy</a>	Copy webhooks to another folder or subfolder where the user has permission.
<a href="#">Move</a>	Move webhooks to another folder or subfolder where the user has permission.

<a href="#">Remove</a>	Remove webhooks.
------------------------	------------------

The *Context Menu* options include:

Toolbar Option	Description
<a href="#">Rename</a>	Rename the webhook.
<a href="#">Move</a>	Move webhooks to another folder or subfolder where the user has permission.
<a href="#">Copy</a>	Copy webhooks to another folder or subfolder where the user has permission.
<a href="#">Remove</a>	Remove webhooks.
<a href="#">Trigger</a>	Trigger the webhook.

## Sorting Webhooks

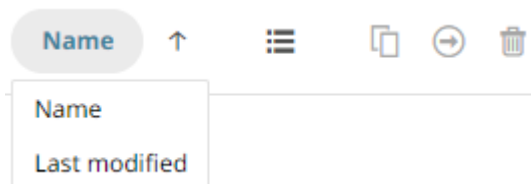
Sorting webhooks can be done by **Name**, **Last Modified**, or **Last Modified By**.

### 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**.

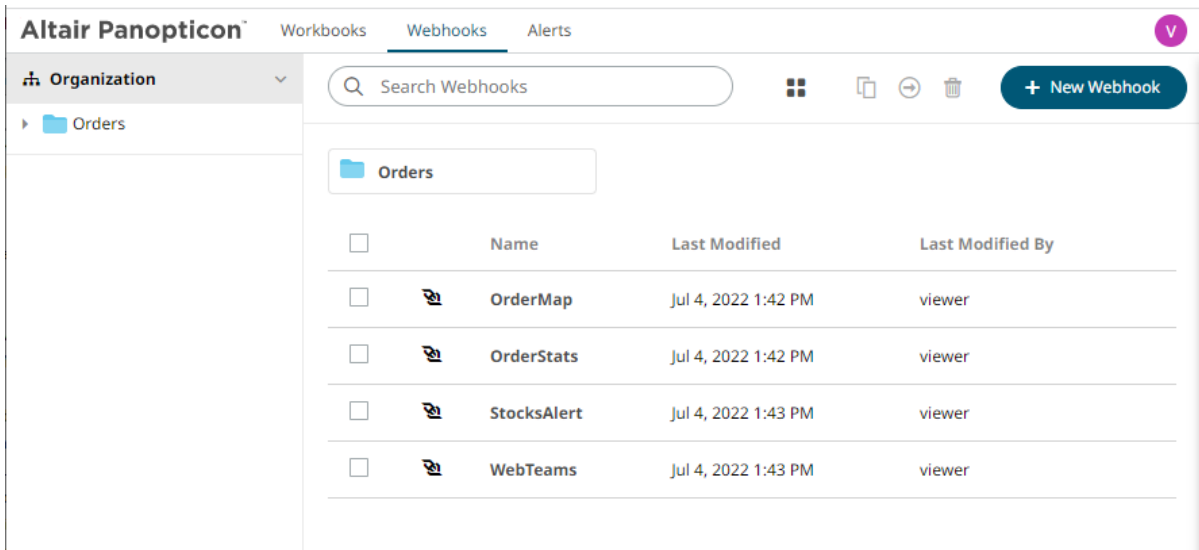


- Name
- Last Modified



Then click the *Sort Order*:

-  Ascending
-  Descending

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



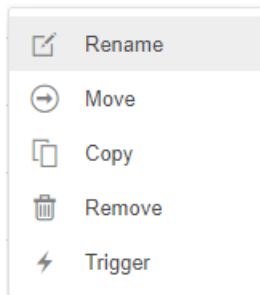
Then click the *Sort Order*:

-  Ascending
-  Descending

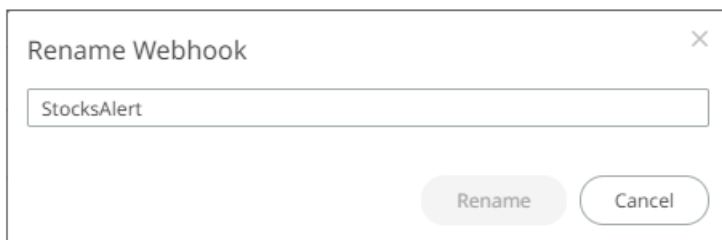
## Renaming a Webhook

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  .

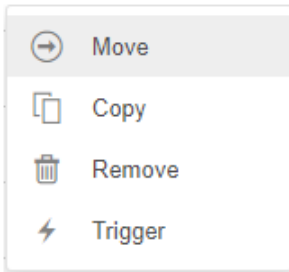
## Moving Webhooks

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

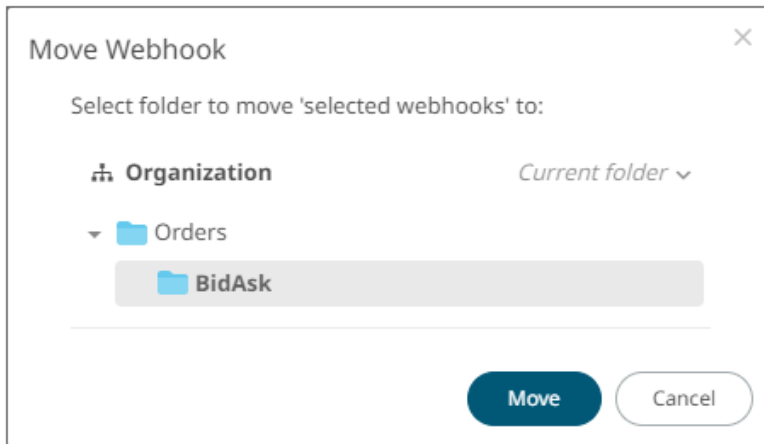
### Steps:

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

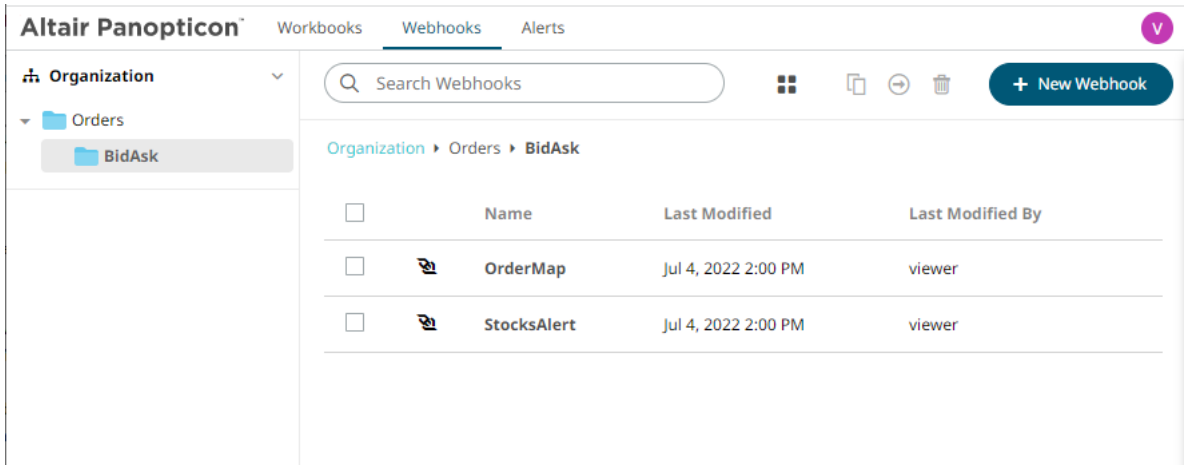


The *Move Webhook* dialog displays with the folder or subfolders that the user is allowed to move the webhooks. Select the folder or subfolder.



3. Click  .

The webhooks are moved and displayed on the selected folder.




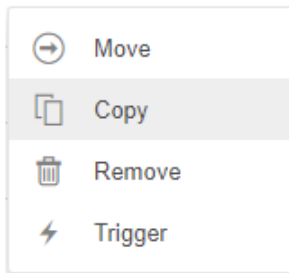
## Copying Webhooks

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

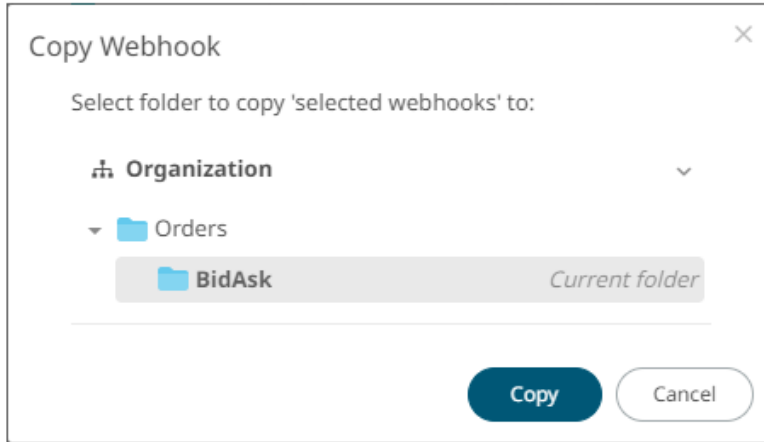
### Steps:

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

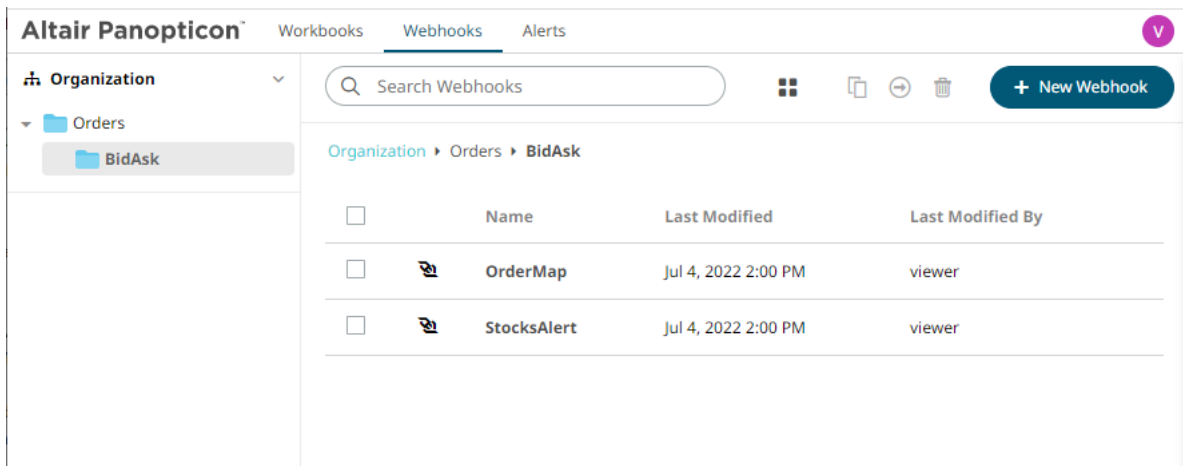


The *Copy Webhook* dialog displays with the folder or subfolders the user is allowed to copy the webhooks to. Select the folder or subfolder.



3. Click  .


The webhooks are copied and displayed on the selected folder.



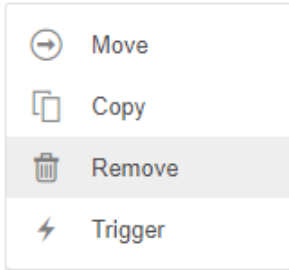
## Deleting Webhooks

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

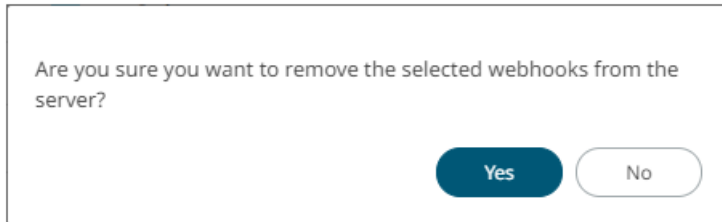
### Steps:

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





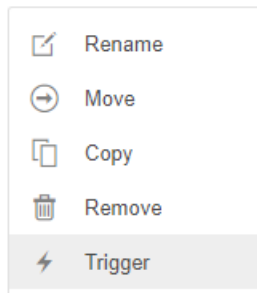
A notification message displays.



3. Click  to remove.

## Triggering Webhooks

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




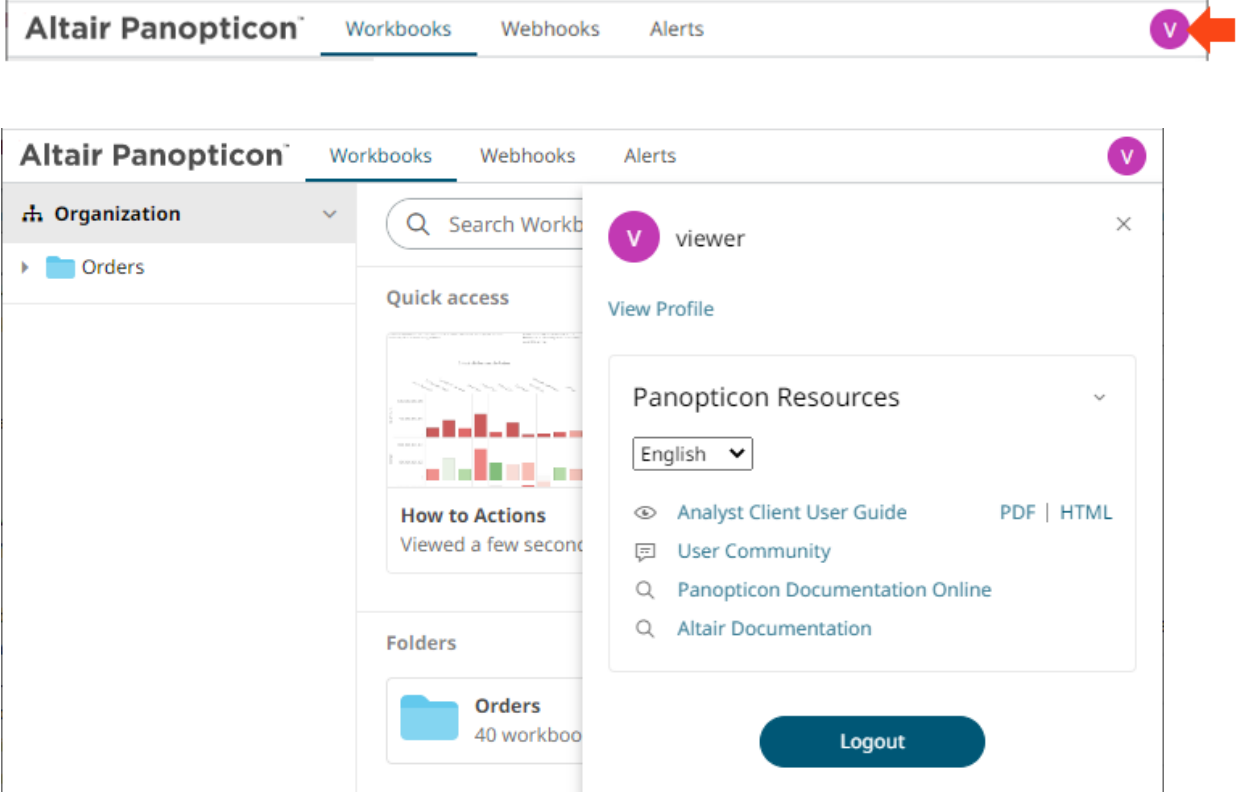
Any parameter in the request body will be replaced by its value when triggering the webhook request.

For example:

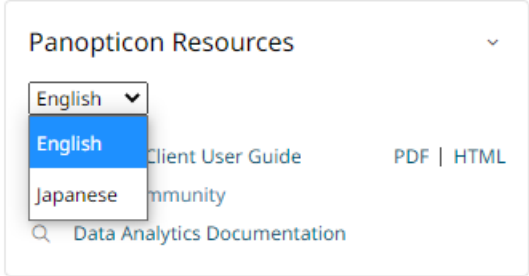
```
{_current_time} - 2021-07-01T12:34:56Z
```

# [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 Real Time documentation for users with a Viewer role which consists of: <ul style="list-style-type: none"> <li>• viewing and analysing of workbooks</li> <li>• creating, monitoring, and deleting of alerts</li> </ul> Available upon installation.
User Community	Link to the Panopticon User Community page.
Data Analytics Documentation	Link to the Altair Data Analytics Documentation page.

04.2023

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## ABOUT PANOPTICON

For more information on Panopticon and other resources, go to <https://www.altair.com/panopticon>.