## LAUNCH ALTAIR PANOPTICON REAL TIME

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

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

- Open recently viewed workbooks
- Create a new workbook
- Access the Web Authoring Quick Start
- View online documentation and help
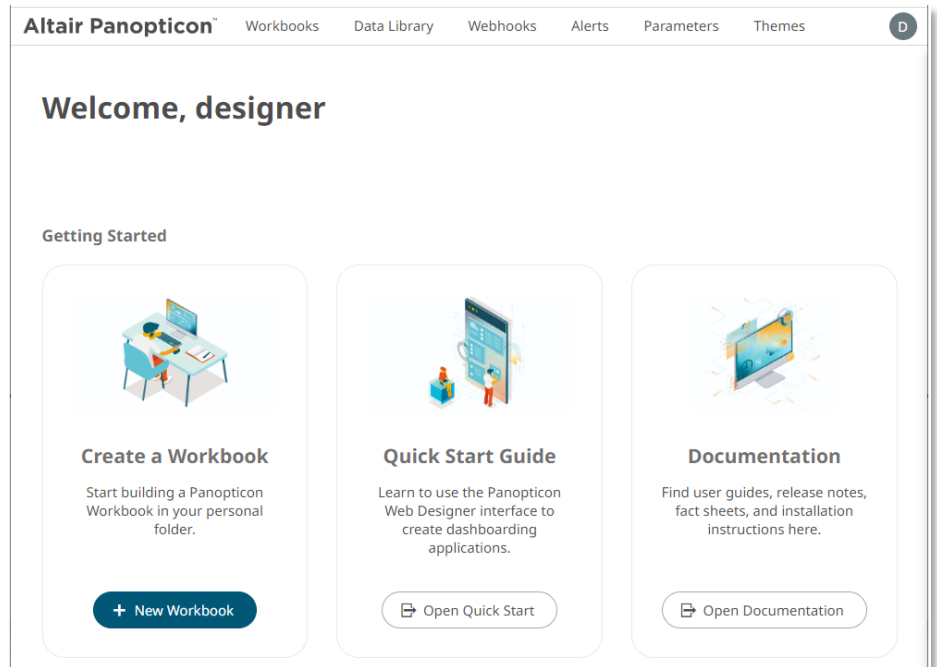
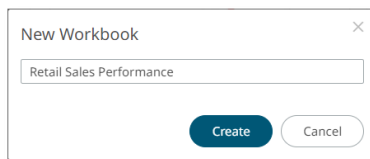## FROM DATA TO DASHBOARD IN 3 QUICK STEPS

1 CREATE A WORKBOOK

On the **Workbooks** tab, select **My Workspace** folder then click

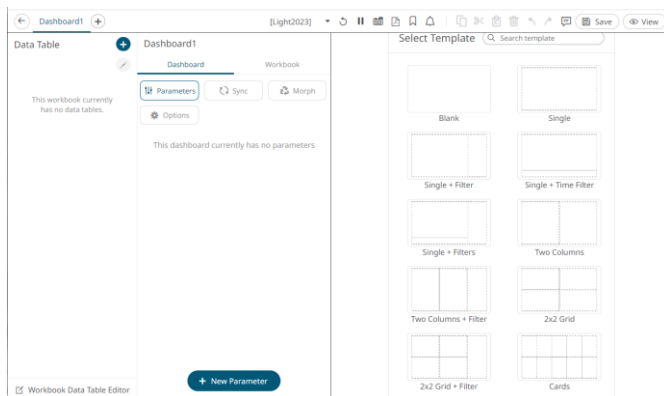**+ New Workbook**

.

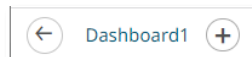Enter the workbook name

Create

and click

.

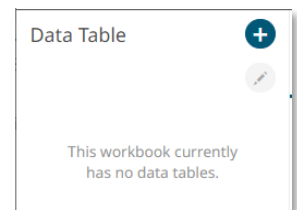This opens the *Open Workbook in Design Mode*.

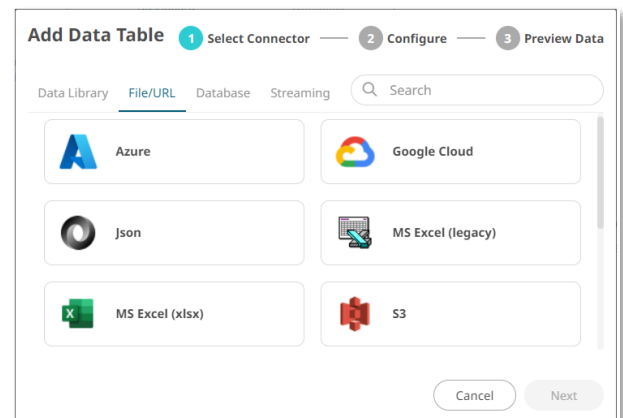The dashboard name by default is editable. Enter a descriptive name.

2 CONNECT TO DATA

To proceed with creating a workbook, data tables must be added first.

Click on the *Data Table* panel.

The *Add Data Table* wizard displays.

Using the wizard:

1 Select Connector

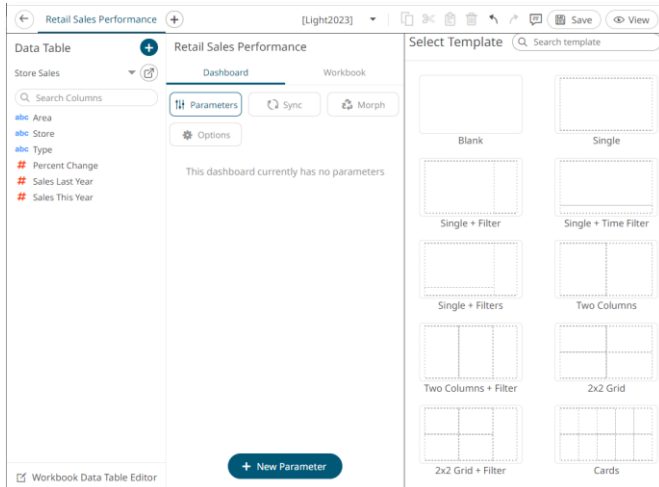Select **File/URL** tab then click **MS Excel (xlsx)**.

2 Configure

1. Click **Upload File** to browse an MS Excel .XLSX file and select it.

2. Select a sheet.

3. Define initial settings then click **Next**.

3 Preview Data

1. Inspect the preview of the data then click **Data Library** to save it to the Data Library.

2. Click **OK**.

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


3 BUILD A VISUALIZATION

1. On the dashboard canvas, click **Single + Filter** template.

   The skeleton image of each part is displayed on the dashboard.


Use the settings to create a part

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

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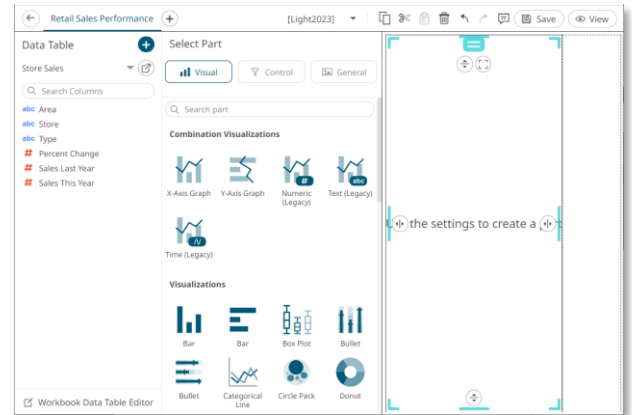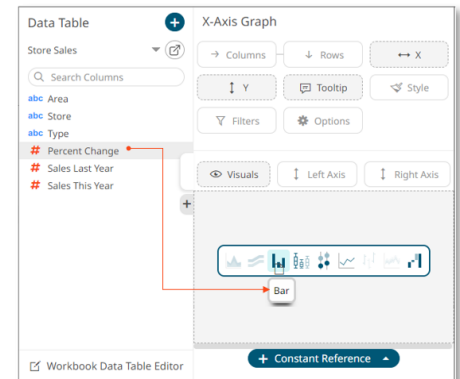

3. Select **X-Axis Graph**.

4. Drag columns from the *Data Table* pane to the *X-Graph Settings* pane to define the hierarchical breakdown and visualization variables (e.g., Columns, Rows, X, Y).
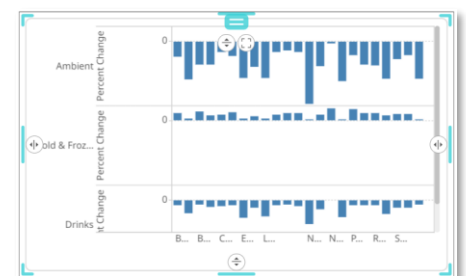
For the *X-Axis* variable, select and drag and drop a column on the *X* pill.
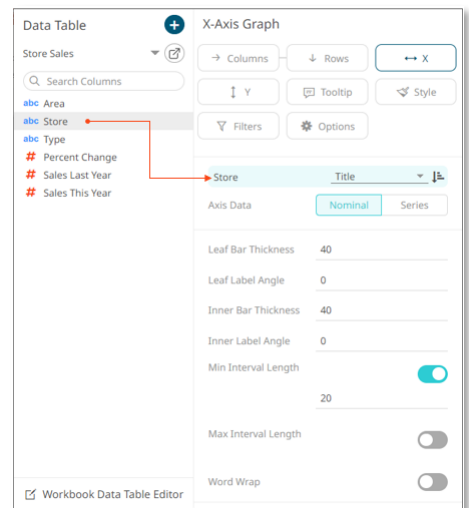
For the *Y-axis* variable, select a column and drop it on the *Bar* graph visualization.
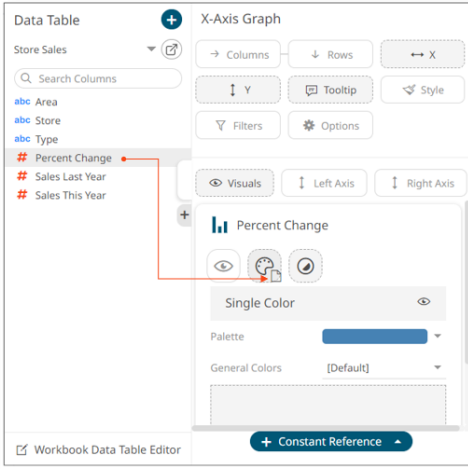

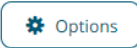The *X-Axis Graph* displays on the dashboard.
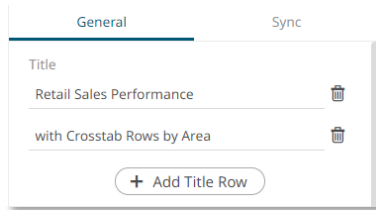
3.1 ENHANCE YOUR VISUALIZATION

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

The color variable is applied to the visualization.
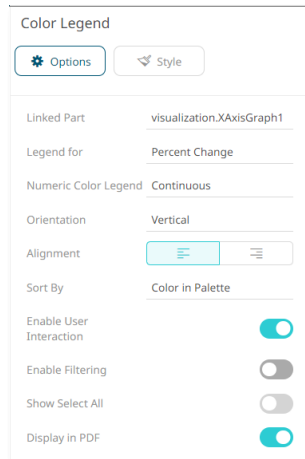

2. Click [Options] and add *Title Rows*.

3.2 ADD COLOR LEGEND

1. Draw another rectangle on the dashboard canvas and click [Control] then the

   Color Legend icon.

   You will see a skeleton image of the legend.

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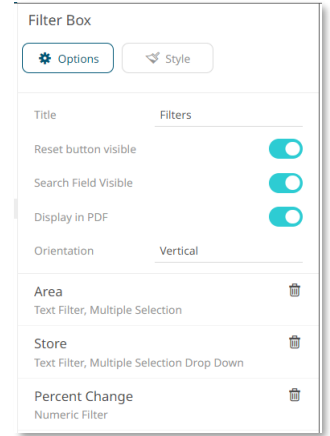

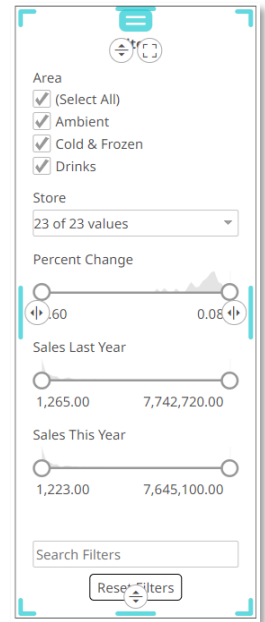The color legend displays.

3.3 ADD FILTERS

1. Click the right part to highlight.

   The *Filter Box Settings* pane is displayed.

2. On the *Filter Box Settings* pane, enter the *Title* and define the other settings. Then drag and drop text columns from the *Data Table* pane.

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

3. Click on a filter column to expand and modify the settings as required.
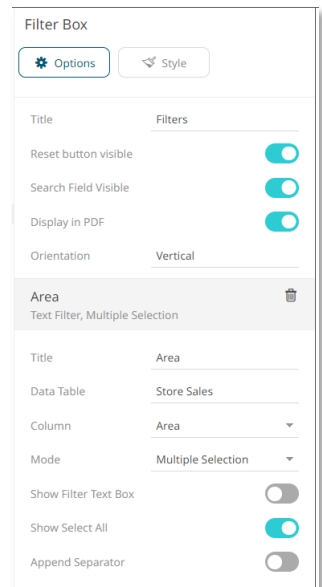
3.4 SAVE YOUR WORKBOOK

Click the **Save** [icon] icon on the toolbar. Once saved, the

[✓ Saved!] notification is displayed.

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

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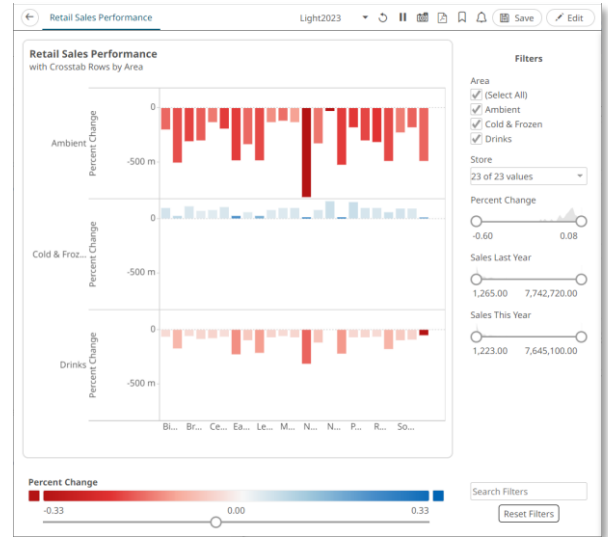
LEARN MORE

DATA LIBRARY

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

REFINE YOUR DATA TABLE BY ADDING CALCULATED COLUMNS

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

2. On the *Calculated Columns* pane, click [+ New Column] then [Calculated].

3. On the *Calculated Columns* pane, enter the title and the settings of the calculated column.
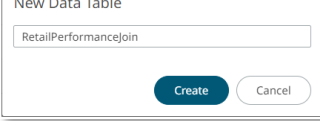
4. Click [💾 Save]. The new calculated column is added and displayed in the *Data Preview* pane.

JOIN DATA TABLES

1. Click **+ New Joined Data Table** on the *Data Library* page.

2. Enter the name and click **Create** .
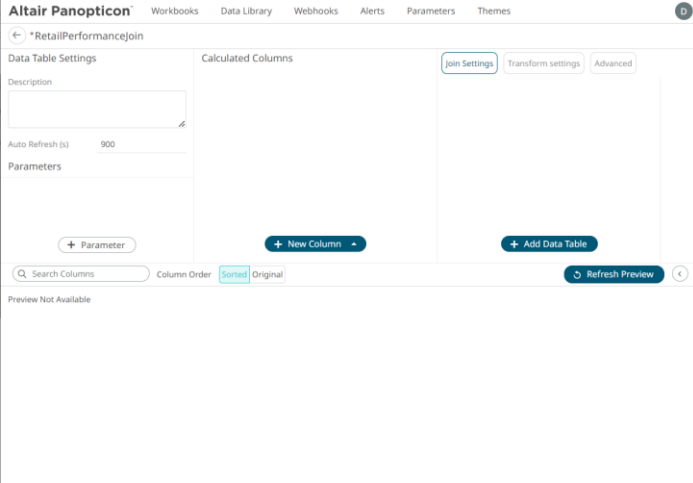
    New Data Table

    RetailPerformanceJoin

    Create   Cancel

    The *Join Data Table Editor* is displayed.
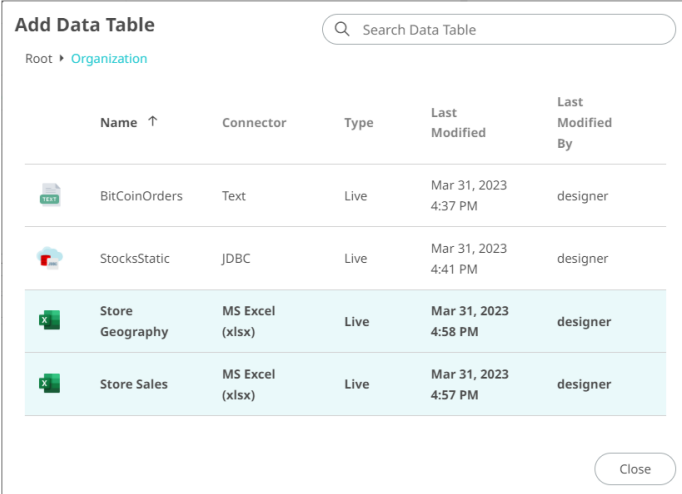
3. Click **+ Add Data Table** . Then select the data tables to join.

    Add Data Table

    Root ▸ Organization

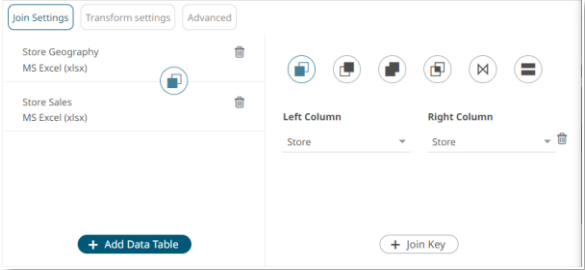 | | Name ↑ | Connector | Type | Last Modified | Last Modified By |
    |---|---|---|---|---|---|
    | | BitCoinOrders | Text | Live | Mar 31, 2023 4:37 PM | designer |
    | | StocksStatic | JDBC | Live | Mar 31, 2023 4:41 PM | designer |
    | | Store Geography | MS Excel (xlsx) | Live | Mar 31, 2023 4:58 PM | designer |
    | | Store Sales | MS Excel (xlsx) | Live | Mar 31, 2023 4:57 PM | designer |

    Close

    Click **Close** .

4. To join the data tables, click the **Join** icon.

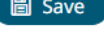   The *Join Key* will be the text column name that is found in both datasets.

5. Click **Save** . The joined data table is added in the *Data Library* page.
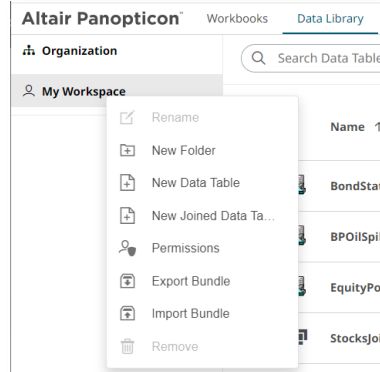

ORGANIZE YOUR CONTENT

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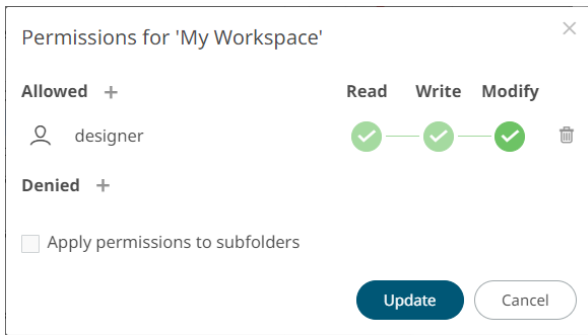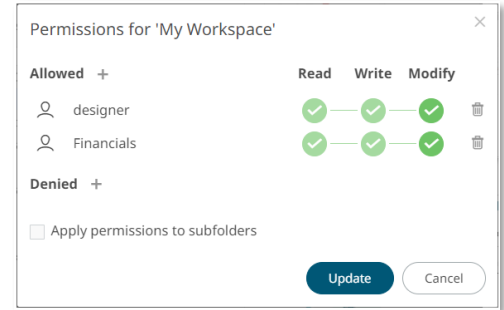
For Workbooks:
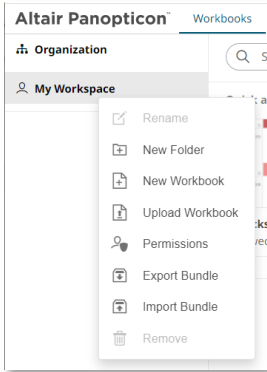
For Data Tables:

1. Right-click on your personal folder and select **Permissions** in the context menu.

2. Click ＋ beside the *Allowed* section. Select a *Group* that will be granted permission.

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

4. Click **Update** .

■ NEXT STEPS

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

- Panopticon Web Authoring Guide
- Analyst Guide
- Visualization Guide

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