

Altair Panopticon™ v2025.1
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 V

Welcome, viewer

Recent Workbooks [See All Workbooks](#)

Axis Graphs
Organization\
Viewed 2 months ago

How to Conflate Time Series Datasets
Organization\
Viewed 2 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](#)

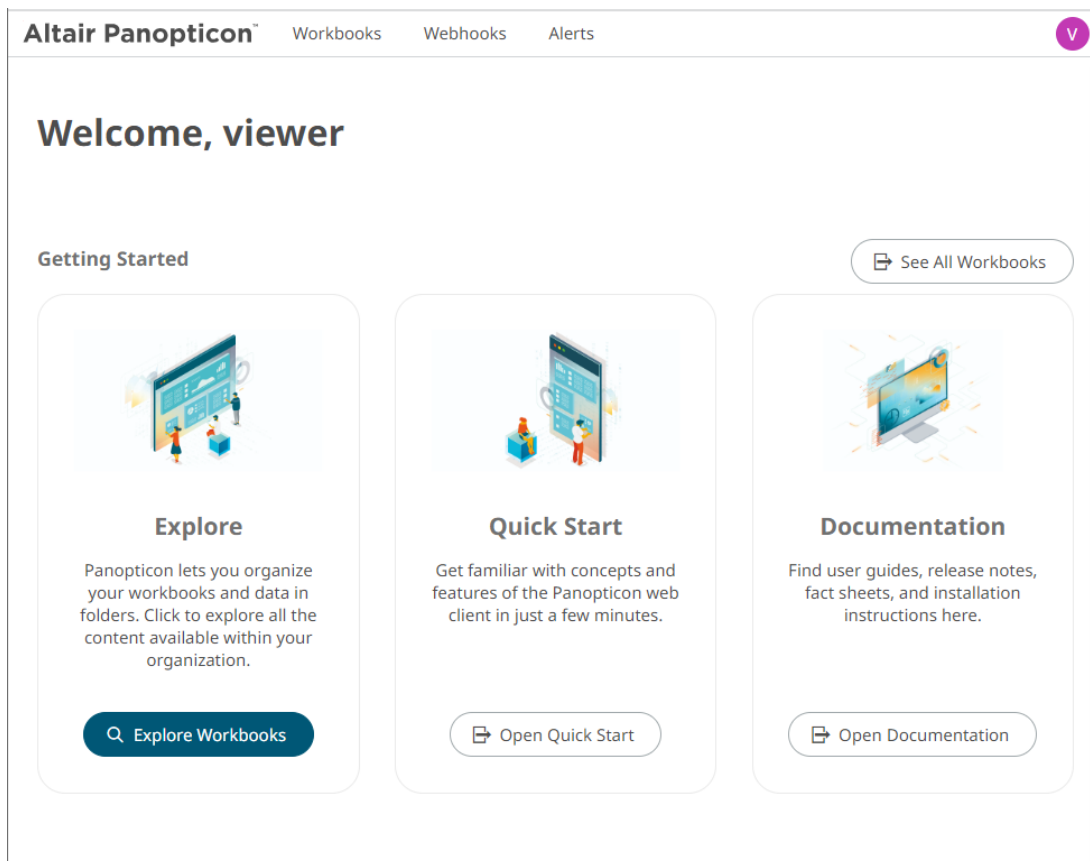
From this page you can:

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

If there are no recently viewed workbooks, header.



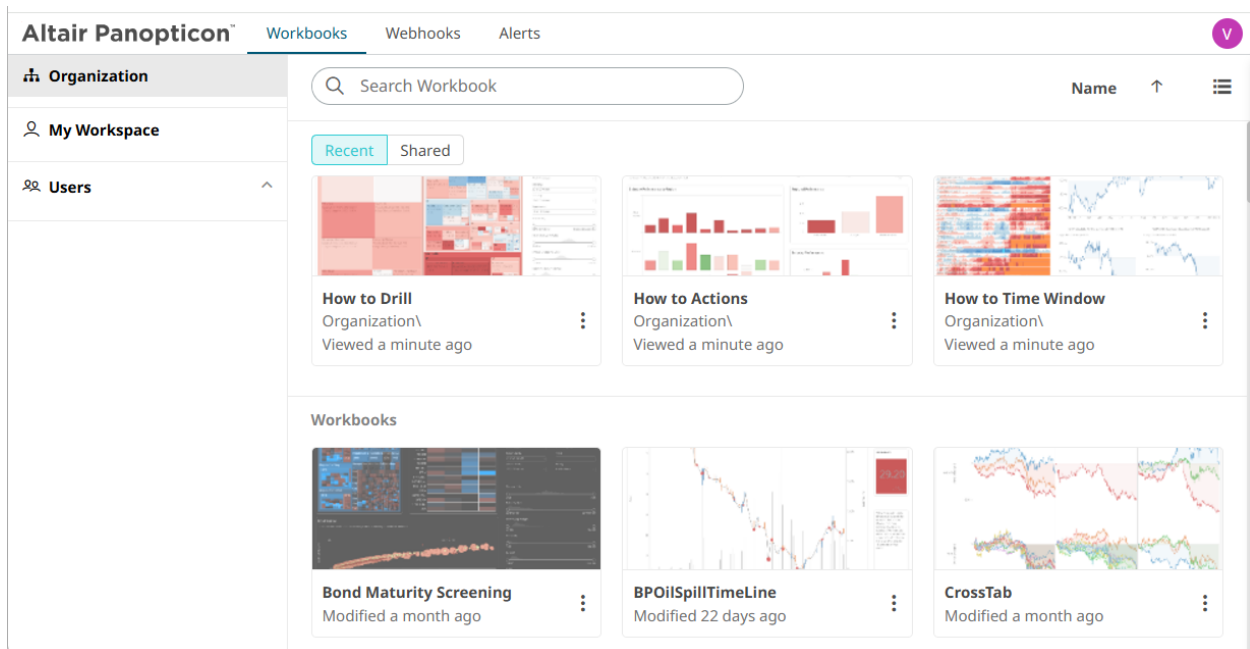
is displayed parallel to the *Getting Started*



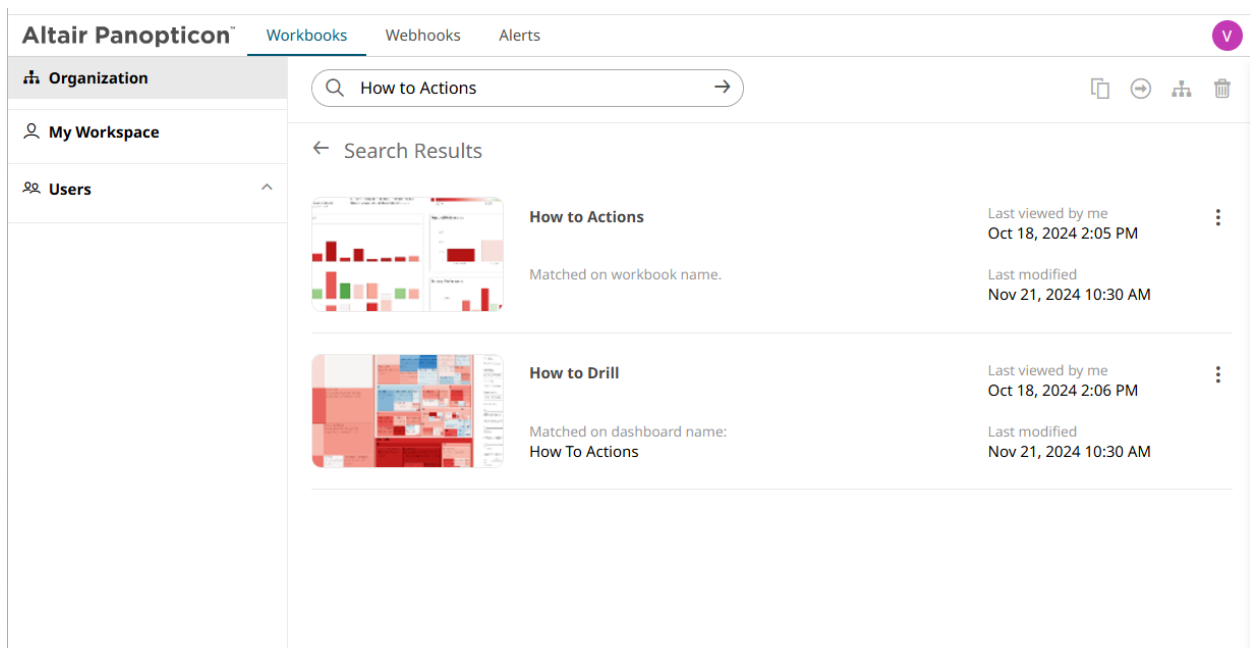
ACCESSING WORKBOOKS

On the **Recent** tab of the *Workbooks* page lists available folders and uploaded or published workbooks in *Grid View*.

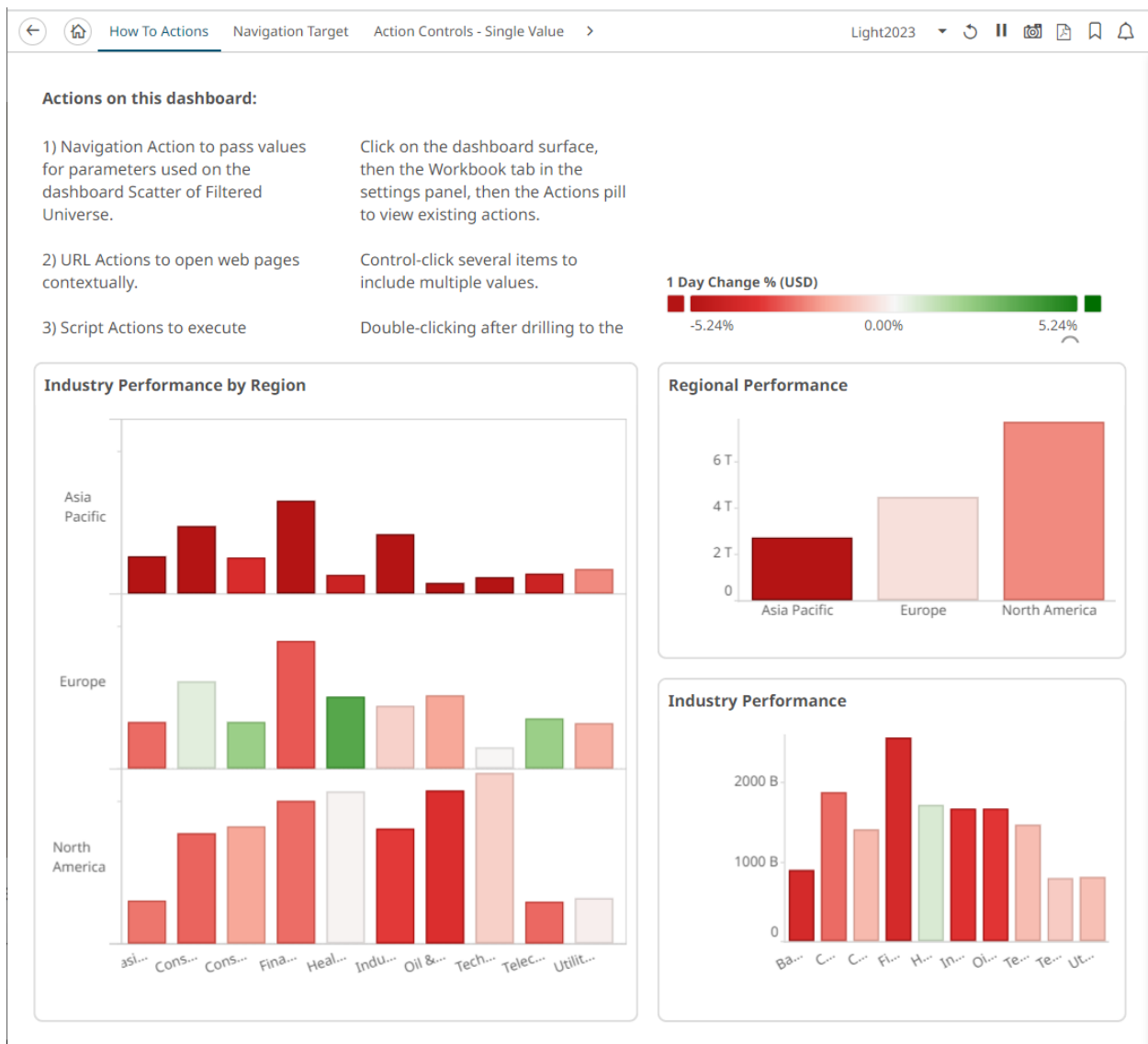
- ❑ The *Folders* include their names and the number of available workbooks.
- ❑ The *Workbooks* include their titles, thumbnail images, and when they were last updated.




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

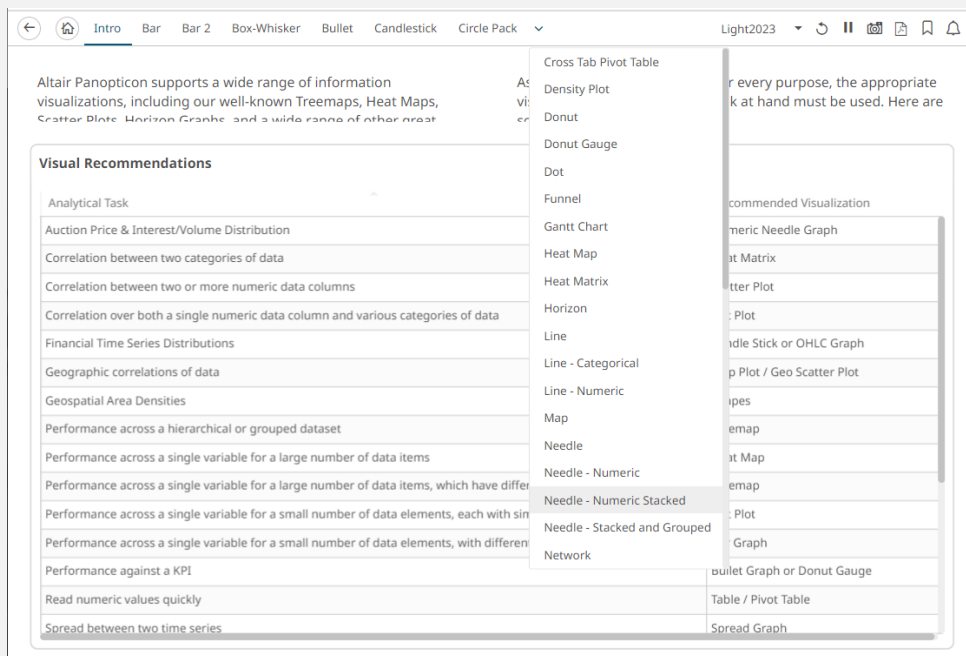


Clicking on the workbook thumbnail opens on the *Open Workbook in View Mode*:



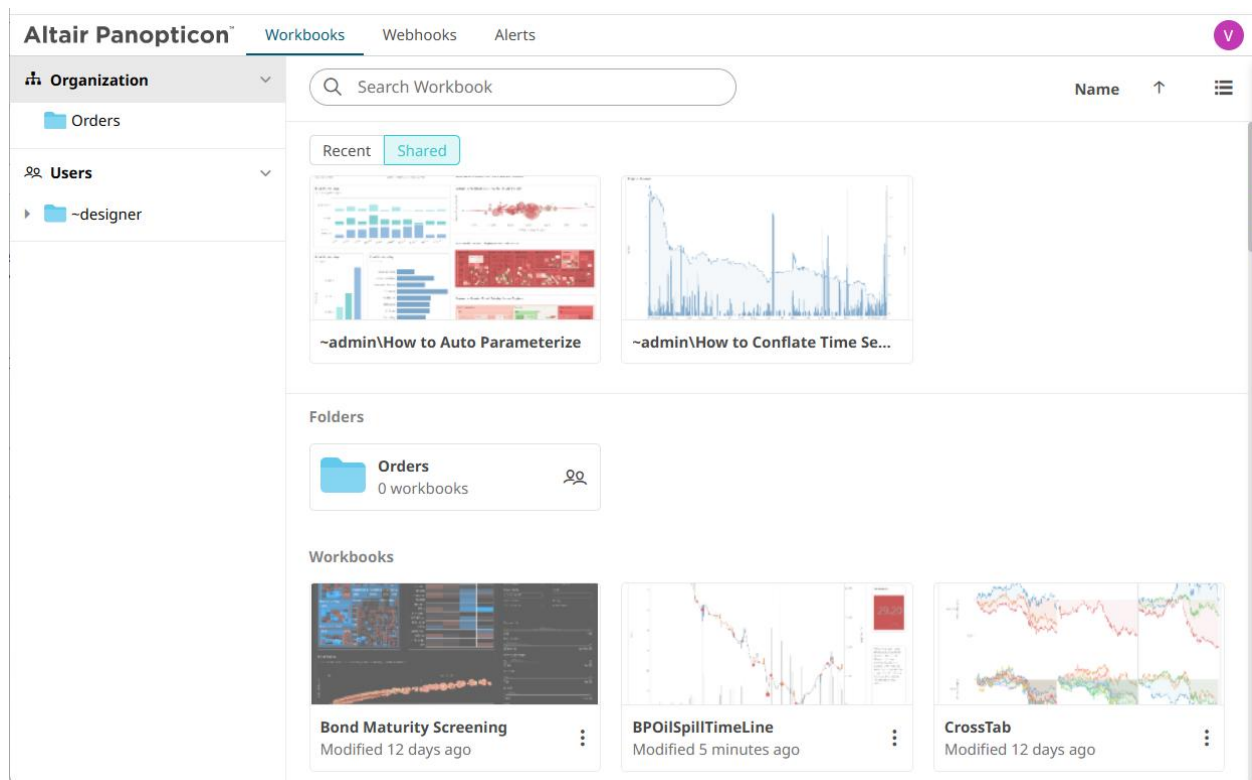
NOTE

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.



Opened workbooks are then displayed on the *Recent* panel.

On the **Shared** pane, the list of workbooks that are accessed through a shared link are displayed.

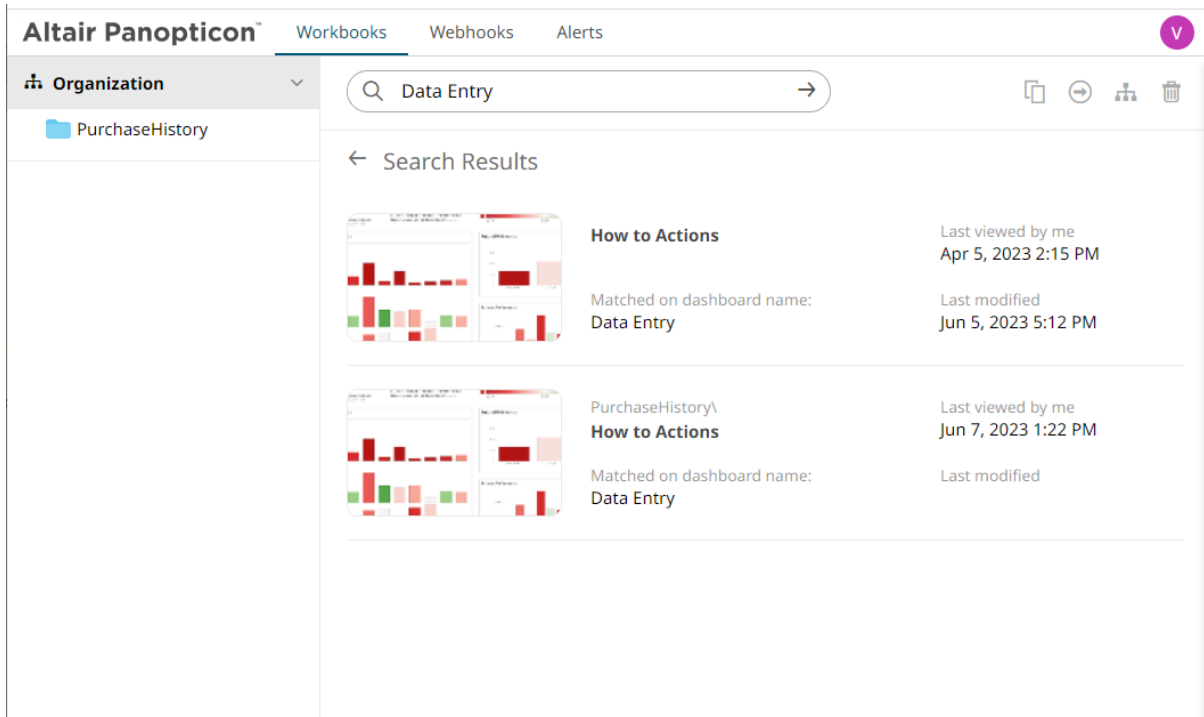


SEARCHING FOR WORKBOOKS

Search for workbooks that may be located in different folders.

Steps:

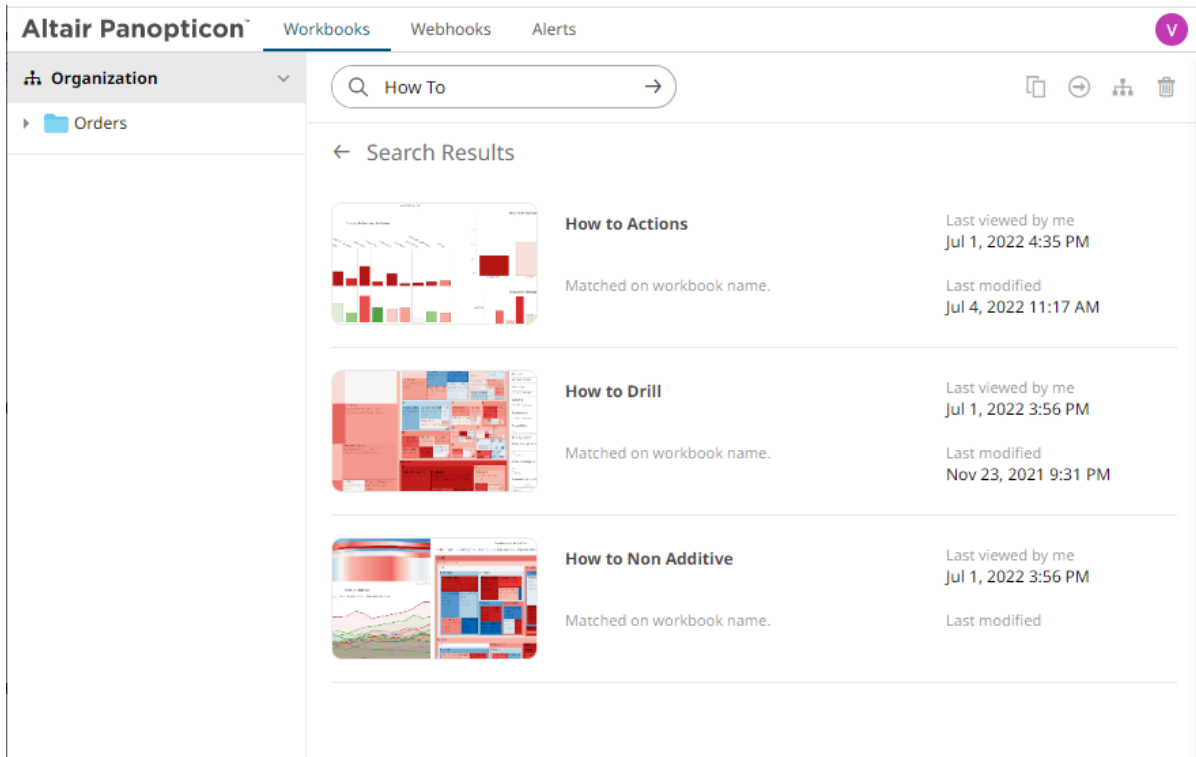
1. On the *Workbooks and Folders Summary* layout, click on a workbook folder then enter a workbook name or dashboard name in the *Search Workbook* box.
2. Click → .



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.

Altair Panopticon™ Workbooks Webhooks Alerts

Organization ▾

Orders

Users ▾

designer

Search Workbook

Recent Shared

How to Drill
Organization\
Viewed 17 hours ago

How to Actions
Organization\
Viewed 17 hours ago

How to Time Window
Organization\
Viewed 18 hours ago

Orders

| | Name ↑ | Last viewed by me | Last published |
|--|--------------------------------|-----------------------|-----------------------|
| | Bond Maturity Screening | Oct 17, 2024 8:03 PM | Oct 18, 2024 2:05 PM |
| | BPOilSpillTimeLine | Oct 17, 2024 8:43 PM | Oct 30, 2024 11:10 AM |
| | CrossTab | Oct 25, 2024 4:14 PM | Oct 18, 2024 2:05 PM |
| | Displaying Spreads | Apr 15, 2024 10:51 AM | Oct 18, 2024 2:05 PM |

Or click **Grid View** . The folders and workbooks are displayed as thumbnails.

Altair Panopticon™ Workbooks Webhooks Alerts

Organization ▾

Orders

Users ▾

designer

Search Workbook

Name ↑

Recent Shared

How to Drill
Organization\
Viewed 17 hours ago

How to Actions
Organization\
Viewed 17 hours ago

How to Time Window
Organization\
Viewed 18 hours ago

Folders

Orders
0 workbooks

Workbooks

Bond Maturity Screening
Modified 12 days ago

BPOilSpillTimeLine
Modified 6 minutes ago

CrossTab
Modified 12 days ago

On either display view style, clicking on a workbook title or thumbnail displays the workbook on the *Open Workbook in View Mode*.

Sorting Workbooks

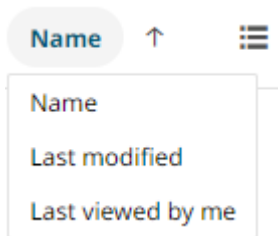
Sorting workbooks can be done by *Name*, *Last Viewed/Last Published*, or *Last Viewed by Me*.

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*

Altair Panopticon™

Workbooks

Webhooks

Alerts

Organization

Orders

Users

~designer

Search Workbook

Recent Shared

How to Drill

Organization\

Viewed 17 hours ago

How to Actions

Organization\

Viewed 17 hours ago

How to Time Window



Organization\

Viewed 18 hours ago

Orders

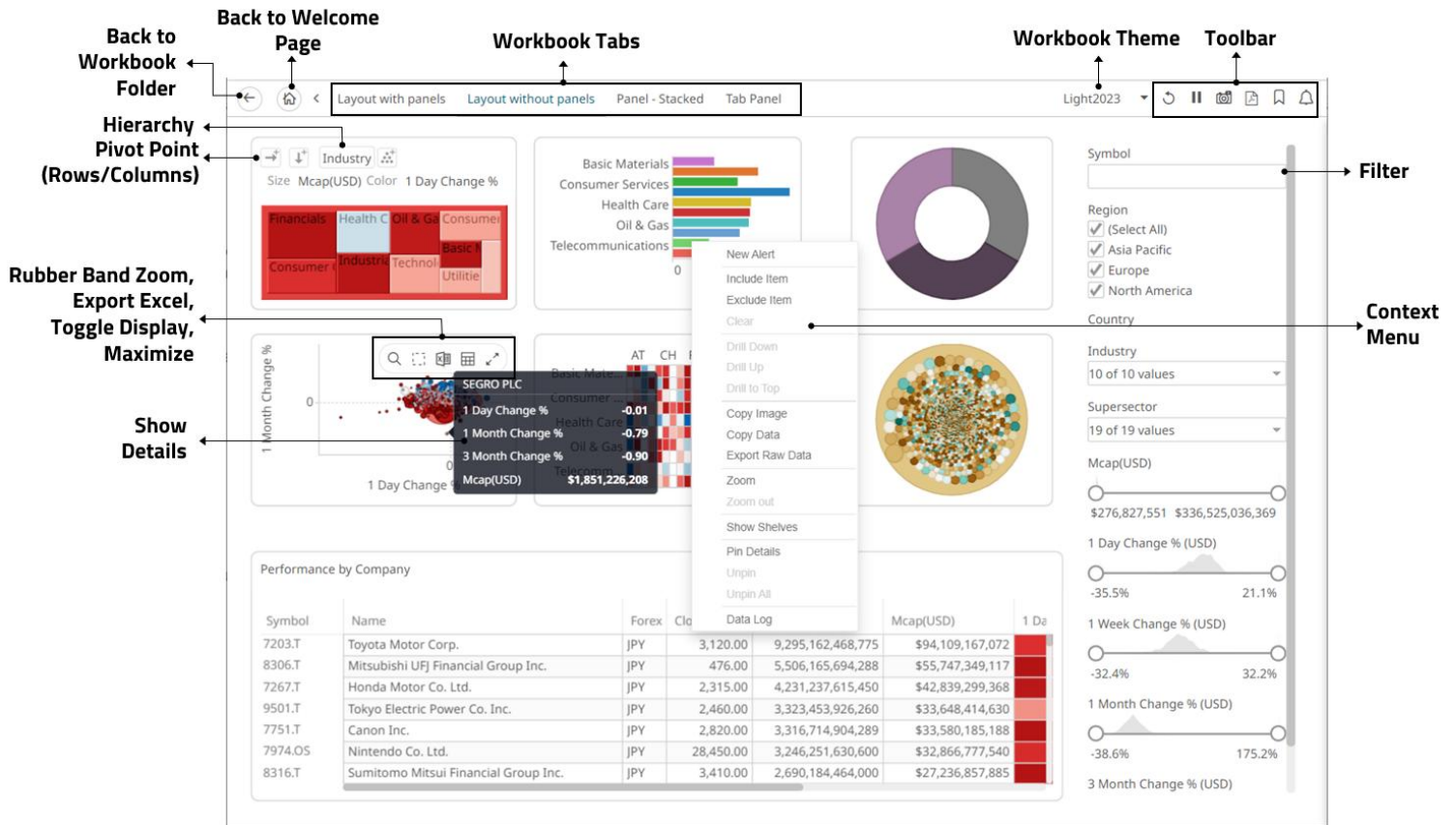
| | Name ↑ | Last viewed by me | Last published |
|--|-------------------------|-----------------------|-----------------------|
| | Bond Maturity Screening | Oct 17, 2024 8:03 PM | Oct 18, 2024 2:05 PM |
| | BPOilSpillTimeLine | Oct 17, 2024 8:43 PM | Oct 30, 2024 11:10 AM |
| | CrossTab | Oct 25, 2024 4:14 PM | Oct 18, 2024 2:05 PM |
| | Displaying Spreads | Apr 15, 2024 10:51 AM | Oct 18, 2024 2:05 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.



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

Working with the Context Menu

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

| | |
|---|---------------------|
| ⚡ | News on Company |
| ⚡ | Reuters Stock Quote |
| | New Alert |
| | Include Item |
| | Exclude Item |
| | Clear |
| | Drill Down |
| | Drill Up |
| | Drill to Top |
| | Copy Image |
| | Copy Data |
| | Export Raw Data |
| | Zoom |
| | Zoom out |
| ✓ | Show Labels |
| ✓ | Show Shelves |
| | Pin Details |
| | Unpin |
| | Unpin All |

Visualization Context Menu

| | |
|---|---------------------|
| ⚡ | News on Company |
| ⚡ | Reuters Stock Quote |
| | New Alert |
| | Include Item |
| | Exclude Item |
| | Clear |
| | Drill Down |
| | Drill Up |
| | Drill to Top |
| | Copy Image |
| | Copy Data |
| | Export Raw Data |
| | Zoom |
| | Zoom out |
| | Set Axis Range... |
| ✓ | Show Labels |
| ✓ | Show Shelves |
| | Pin Details |
| | Unpin |
| | Unpin All |

Visualization Context Menu of the
Numeric Axis

| | |
|---|---------------------|
| ⚡ | News on Company |
| ⚡ | Reuters Stock Quote |
| | Set snapshot here |
| | New Alert |
| | Include Item |
| | Exclude Item |
| | Exclude Time |
| | Clear |
| | Drill Down |
| | Drill Up |
| | Drill to Top |
| | Copy Image |
| | Copy Data |
| | Export Raw Data |
| | Zoom |
| | Zoom out |
| | Set Axis Range... |
| | Pin Details |
| | Unpin |
| | Unpin All |

Time Series Visualization Context
Menu of the Time Axis

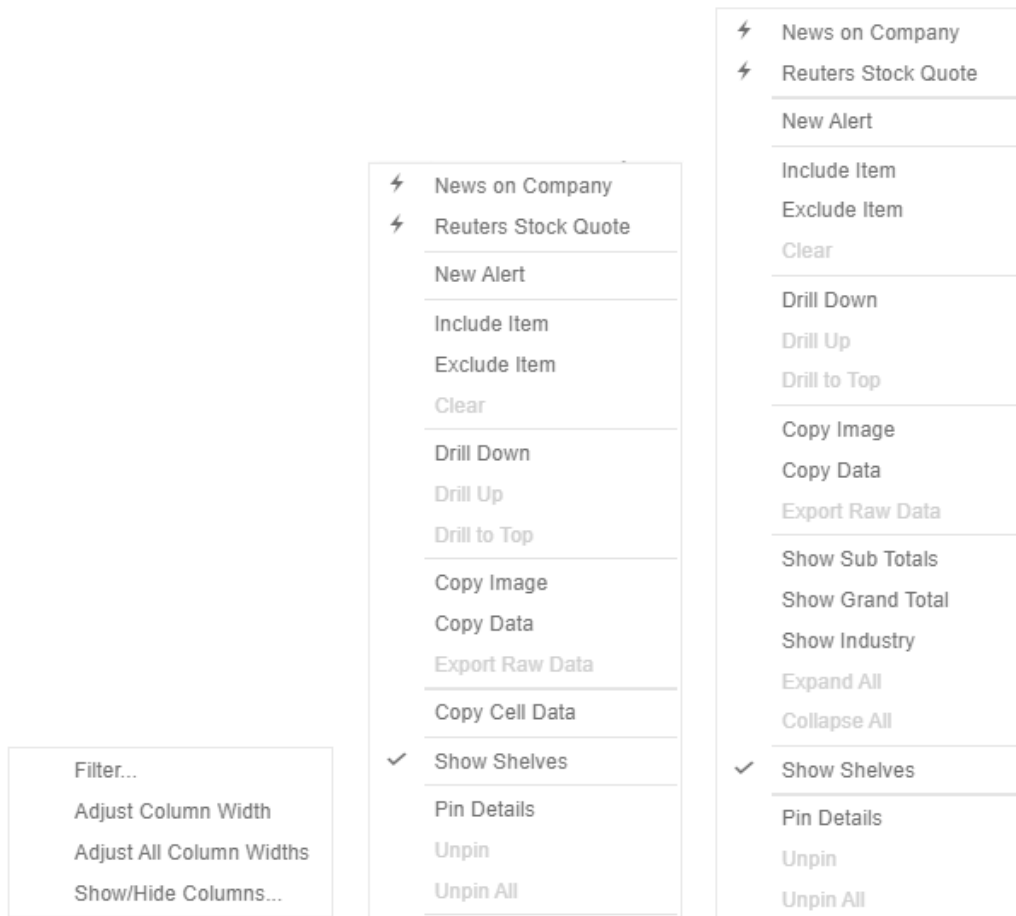


Table visualization context menus depending on where you click on the visualization

| Context Menu | Description |
|--|---|
| Filter | Allows filtering of a table column. NOTE: Applies only to the table visualization not the whole dashboard. |
| Automatic Parameterization | Run an automatic parameterization. |
| Actions | Run a workbook action on the visualization. |
| New Alert | Create an alert . |
| Visualization Filtering | Allows visualization filtering. Options include: <ul style="list-style-type: none"> Filter Include Filter Exclude Filter Clear |
| Drilling | Allows drilling into visualizations. Options include: <ul style="list-style-type: none"> Drill Down Drill Up Drill to Top |
| Data Export | Allows exporting of data. Options include: |

| | |
|------------------------------|--|
| | <ul style="list-style-type: none"> • Copy Image • Copy Data • Export Raw Data • Copy Cell Data (available in Table and Heat Matrix visualizations) |
| Zooming | Allows zooming in and out of visualization sections. |
| Show Labels | Determines whether labels are displayed or not. |
| Show Shelves | Available when Enable Shelves is enabled in the visualization's <i>General</i> settings. Either check Show Shelves in the context menu or tap the Shelves slider in the <i>General</i> settings to display cross tab, breakdown, and variable shelves in the visualization. |
| Pinning | Allows pinning of the <i>Details</i> pop-up. Options include: <ul style="list-style-type: none"> • Pin Details • Unpin • Unpin All |

The additional time series visualization context menu options include:

| Setting | Description | | | | | | |
|-----------------------------------|---|--------------|--------------------|--------------|----------------|--------------------|--------------|
| Set Snapshot Here | 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. | | | | | | |
| Set Axis Range | <div>Allows setting of the time axis range:</div> <div><table><tr><td>Min Range</td><td><div>minutes</div></td><td><div>0</div></td></tr><tr><td>Increment Step</td><td><div>minutes</div></td><td><div>0</div></td></tr></table></div> <ul style="list-style-type: none">Min Range The minimum time axis range. Supported units are milliseconds, seconds, minutes, hours, days, months, quarters, and years.Increment Step 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. | Min Range | <div>minutes</div> | <div>0</div> | Increment Step | <div>minutes</div> | <div>0</div> |
| Min Range | <div>minutes</div> | <div>0</div> | | | | | |
| Increment Step | <div>minutes</div> | <div>0</div> | | | | | |

The additional Table visualization context menu options include:

| Context Menu | Description |
|---------------------------------------|---|
| Adjust Columns | Adjust column width in the table visualization. |
| Show / Hide Columns | Hide or display columns in the table visualization. |
| Show Hierarchy Column | Display the hierarchy column. |

| | |
|---|---|
| Expand / Collapse Hierarchy | 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. |

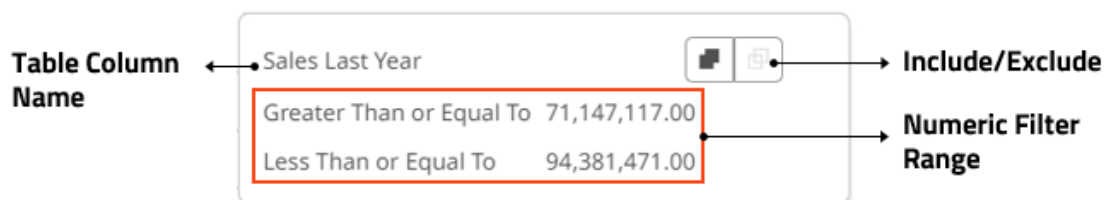
Table Column Filtering

Instead of using a *Filter Box*, you can right-click on a table column header and select **Filter** to perform filtering.



The dialog box that displays will depend on the data column type.

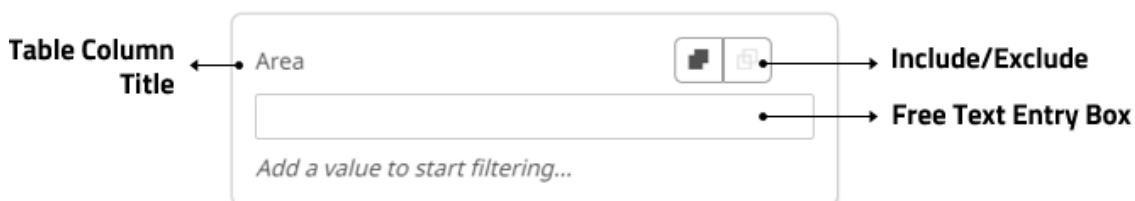
- For numeric columns:



Enter the numeric range filter then click either:

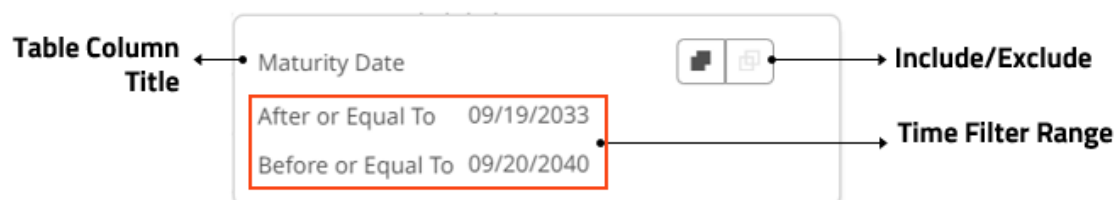
- **Include** to include the entered range, or
- **Exclude** to exclude the entered range.

- For text columns:




This text entry box is the same as the filter in **Include/Exclude** mode.

- For time columns:



Enter the time range filter then click either:

- **Include** to include the entered range, or
- **Exclude** to exclude the entered range.

When a filter is applied on the table columns,  filter icons appear at these places:

- ☐ To the right of the table column header



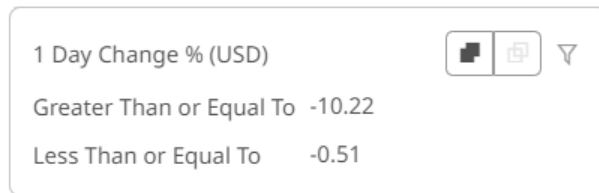
- ☐ Table Header Control





- ☐ Dashboard toolbar



- ☐ Table Column Filter dialog



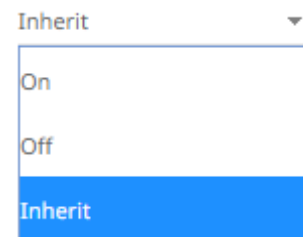
Clicking  will remove the filter.

Also, **Show Active Filters**  icon displays on the Table Header Control. This allows [viewing of all the active filters](#) on the dashboard and its visualizations.


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.

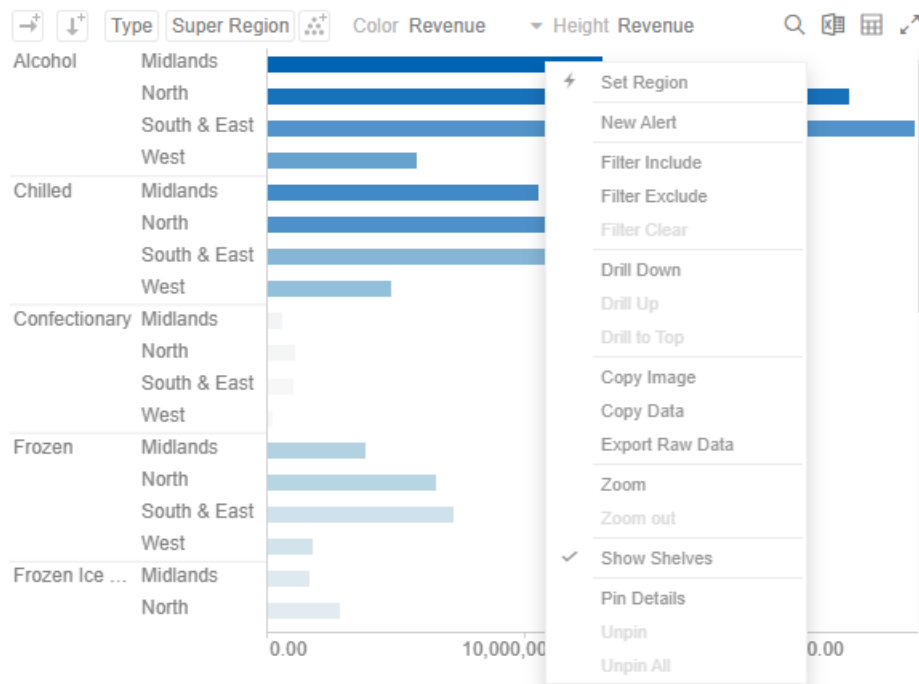


- ☐ On

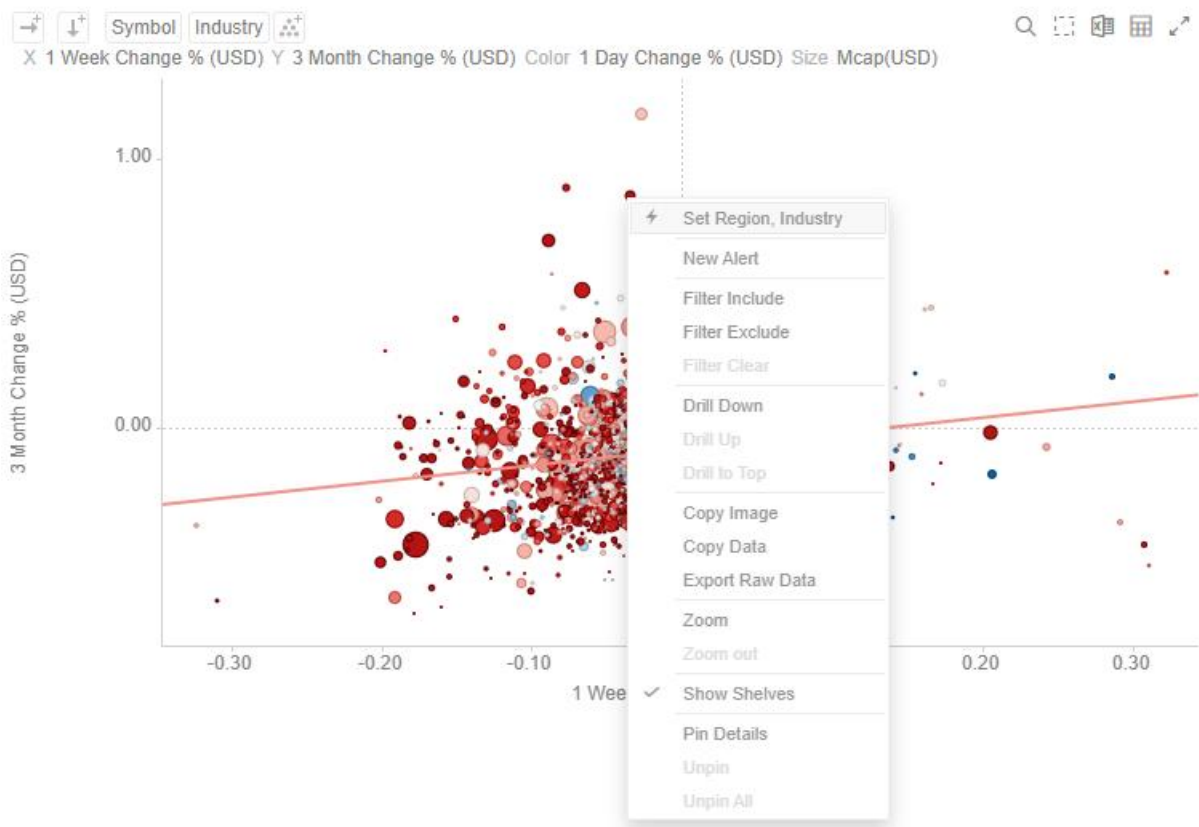
When turned on, parameters can be automatically updated within a dashboard by right-clicking on a visualization item and selecting it from the context menu with the blue lightning  icon.

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:

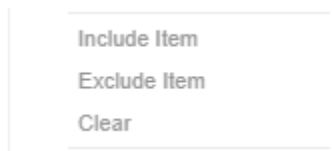
- ☐ Default values on the creation of the parameter in the data table
- ☐ Values specified as a result of right-clicking on an item and executing an action
- ☐ Values specified externally, when a workbook is accessed via the web browser, and the parent web page includes the specified values as inputs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

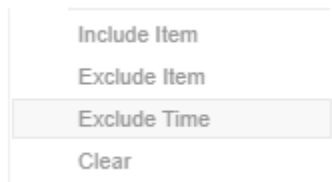


- ☐ **Include Item** filters the dashboard to include the selected items.
- ☐ **Exclude Item** filters the dashboard to exclude the selected items.
- ☐ **Clear** removes any visualization filters.





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.

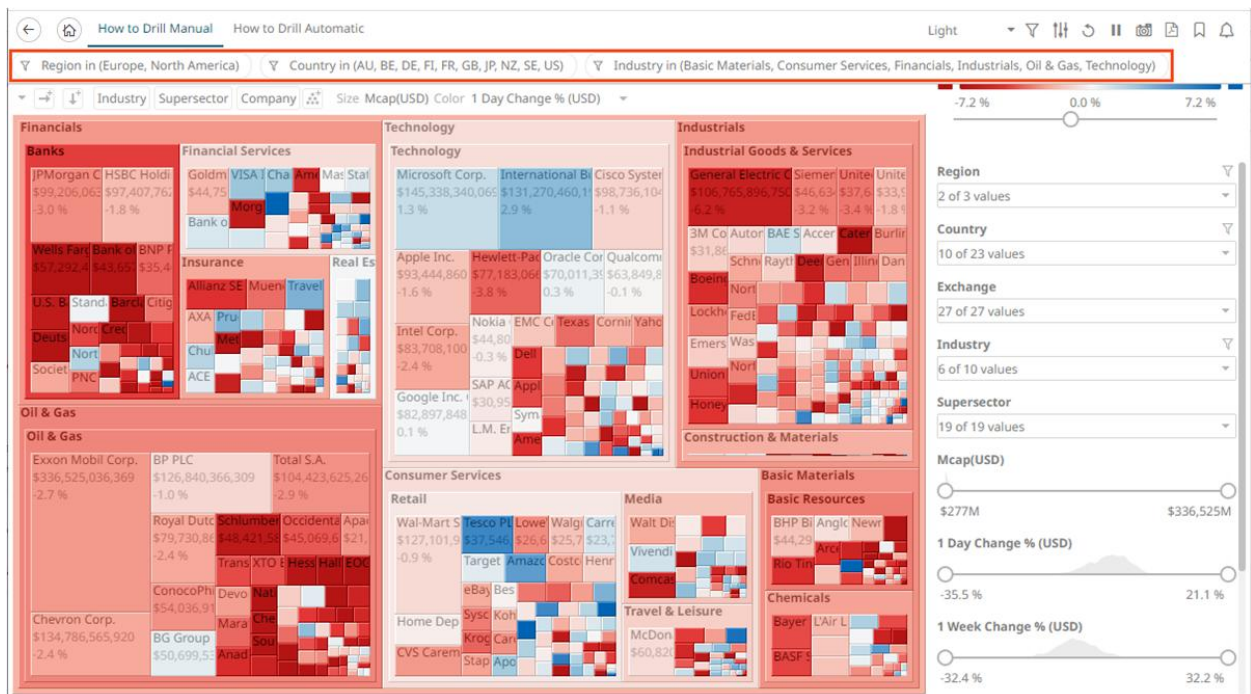
These filters can be done through:

- ☐ 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 on 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

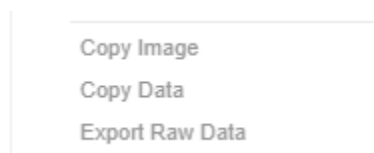
- ☐ Drill Up – Enabled when the lower level of the selected item is displayed. Click to drill to the upper level.
- ☐ Drill to Top – Drills to the top level of the selected value.

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

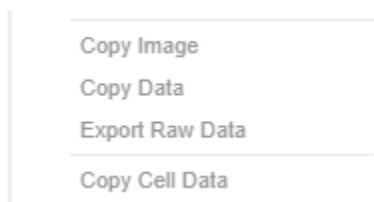
Data Export

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 and Heat Matrix visualizations, **Copy Cell Data** is also available which allows copying of a single cell.

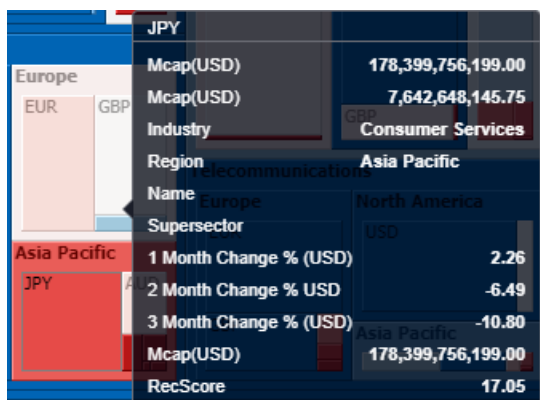


The data exported will be what appears on screen, or in a linked table. Specifically, all the columns that appear in the Detail pop-up, including:

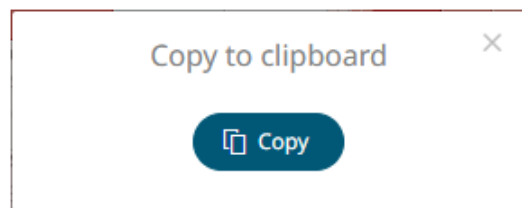
- ☐ Only those items that are visible (for example, items that have not been filtered)
- ☐ Same Visible detail (or depth) level displayed in the visualization.

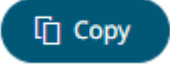
| | 1 Day Change ... | 1 Month Chang... | 1 Week Change... | Mcap(USD) | RecScore | Target |
|---|------------------|------------------|------------------|-------------------|----------|--------|
| <input type="checkbox"/> 3i Group PLC Financials | 0.04 | 0.35 | 0.01 | 1,488,911,563.00 | 0.42 | 12.00 |
| <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.

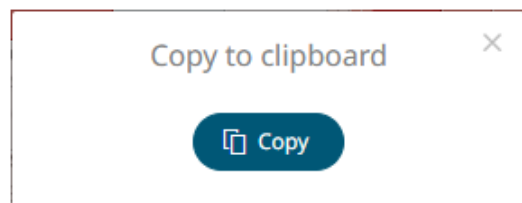


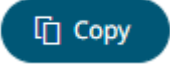
Click  **Copy** to copy and paste the data to another application such as MS Excel.

| | 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.

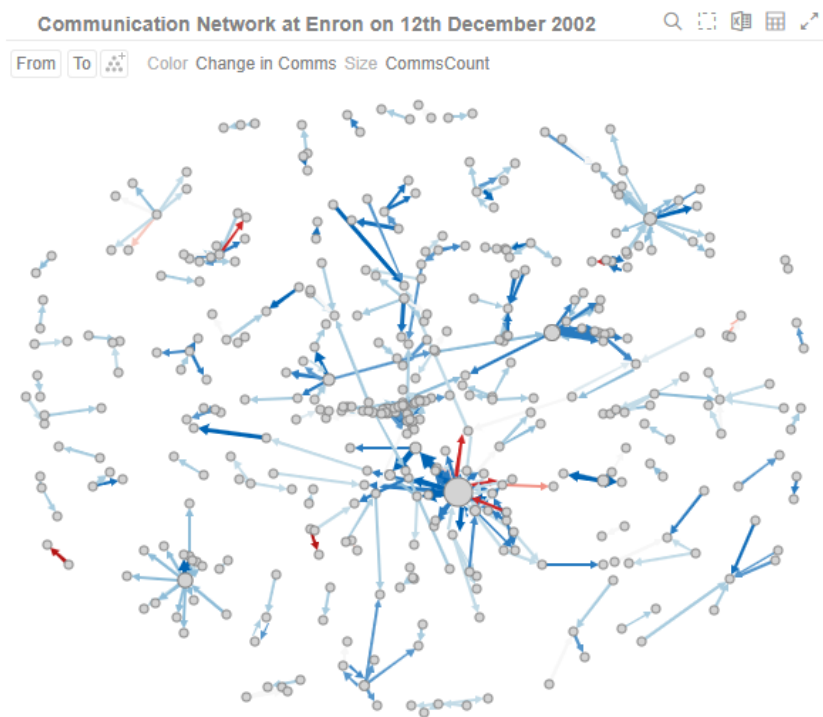


Click  **Copy** to copy and paste the whole dashboard image to another application.


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

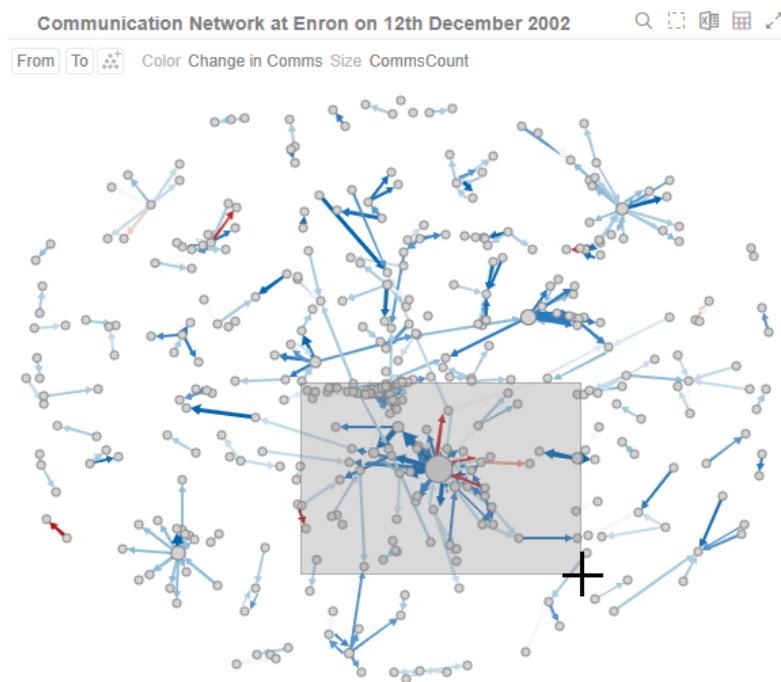


Before selection

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

During

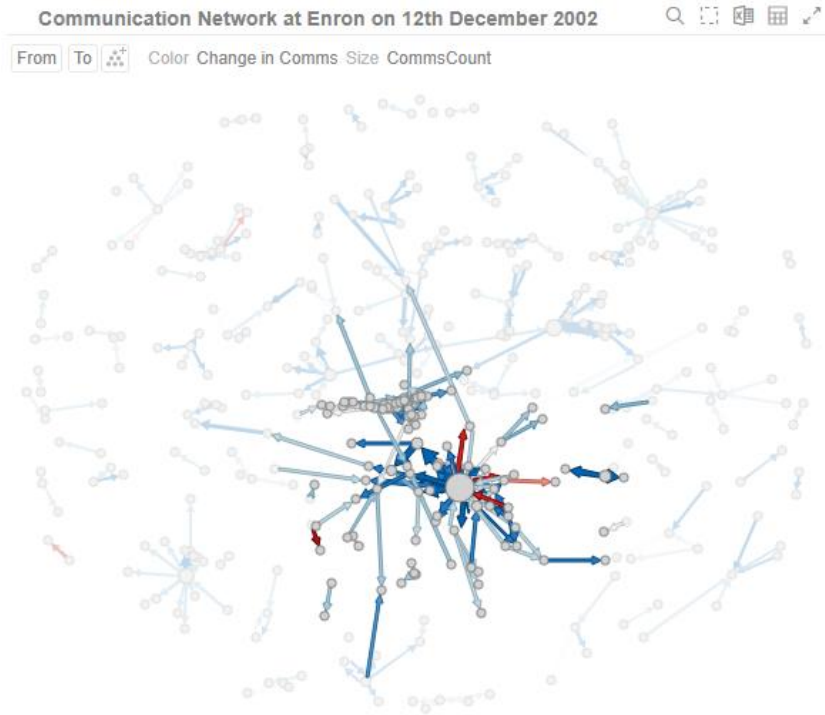
Mouse pointer has been dragged to define an area of interest.



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:

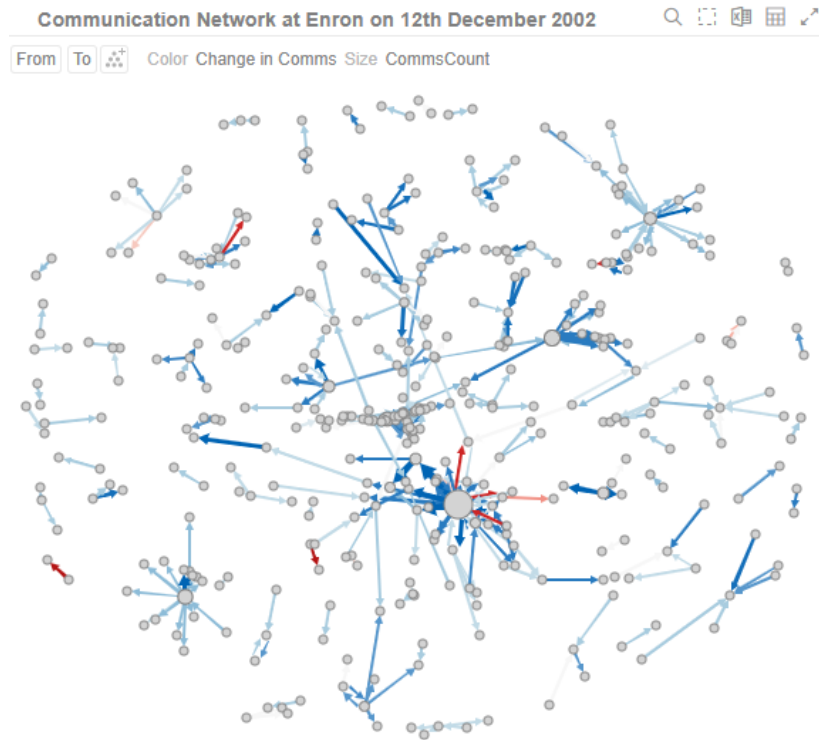
- ☐ Numeric X and Y axes
- ☐ Date/Time X and Y axes

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.

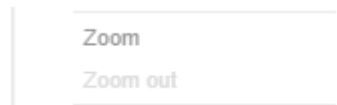
Before




Before zooming

You can either:

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

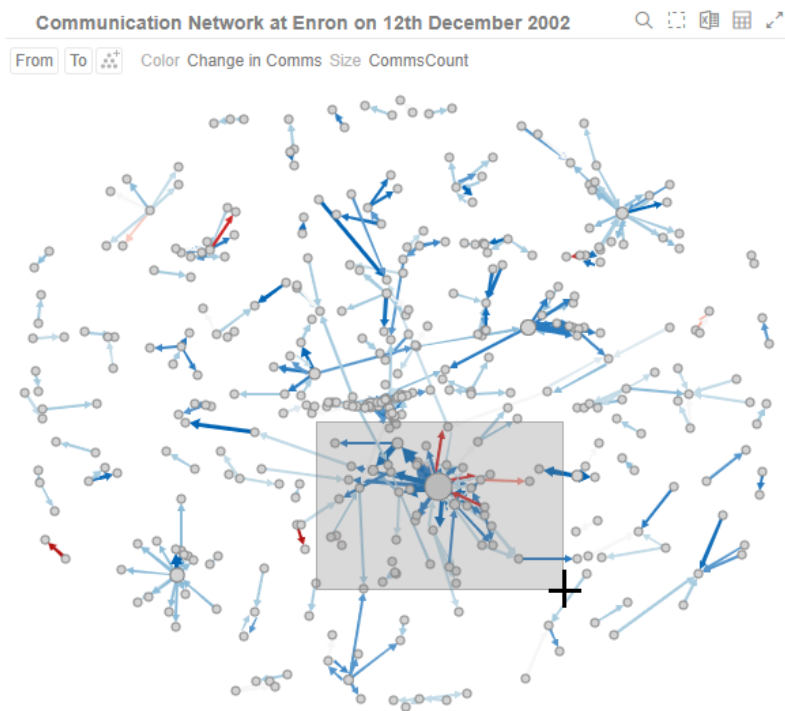


- click the **Rubber Band Zoom**  icon on the header control

The mouse turns into a crosshair .

During

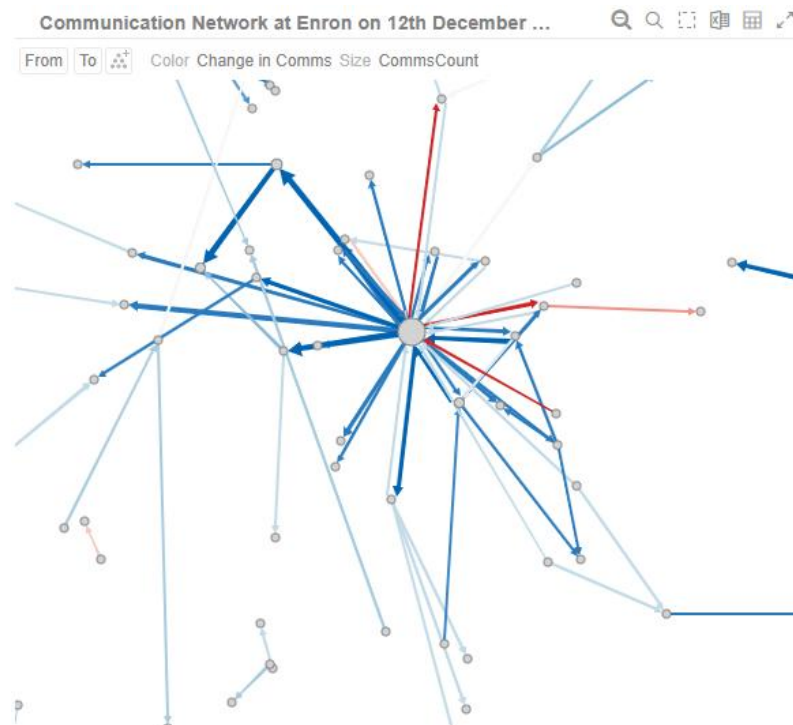
Mouse pointer has been dragged to define an area of interest.



During selection for zooming


After

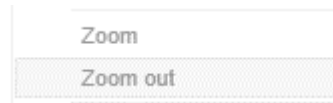
Selected items is zoomed in and the **Zoom Out** icon has is displayed.



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

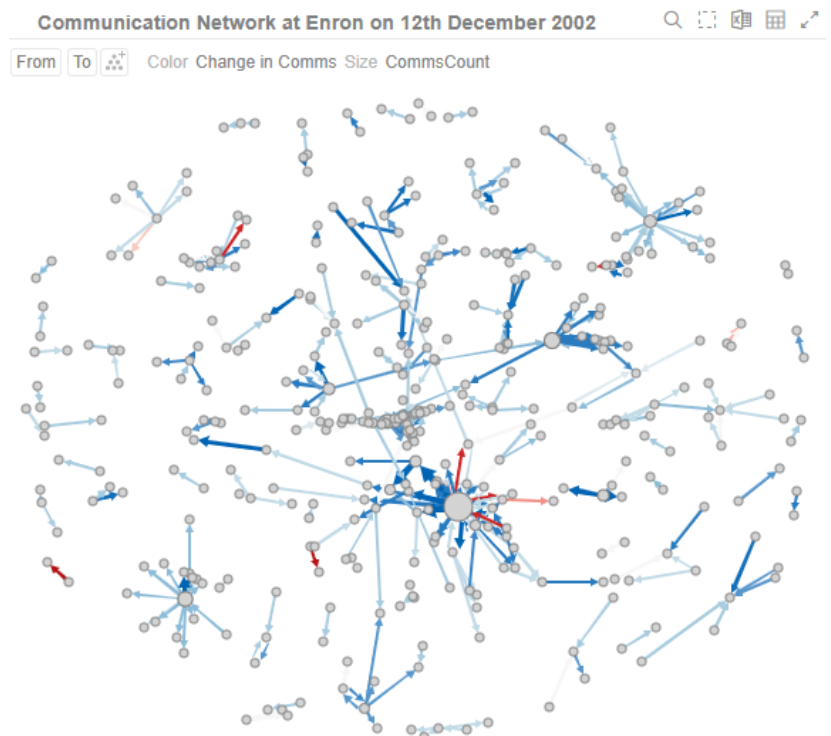


Zooming In and Out with Mouse Wheel

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

Examples:

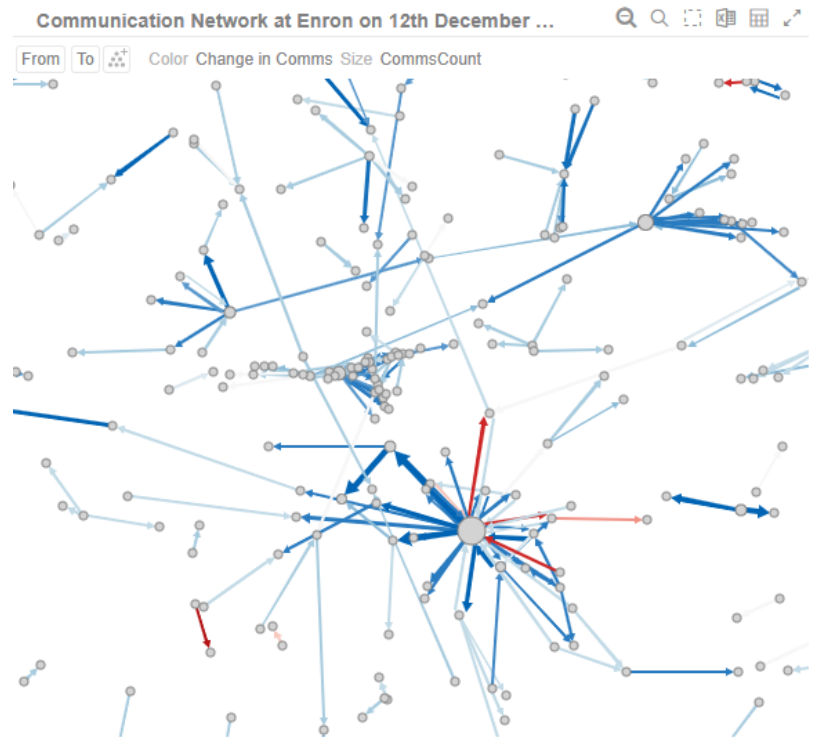
No Zoom



No zoom

Slight Zoom

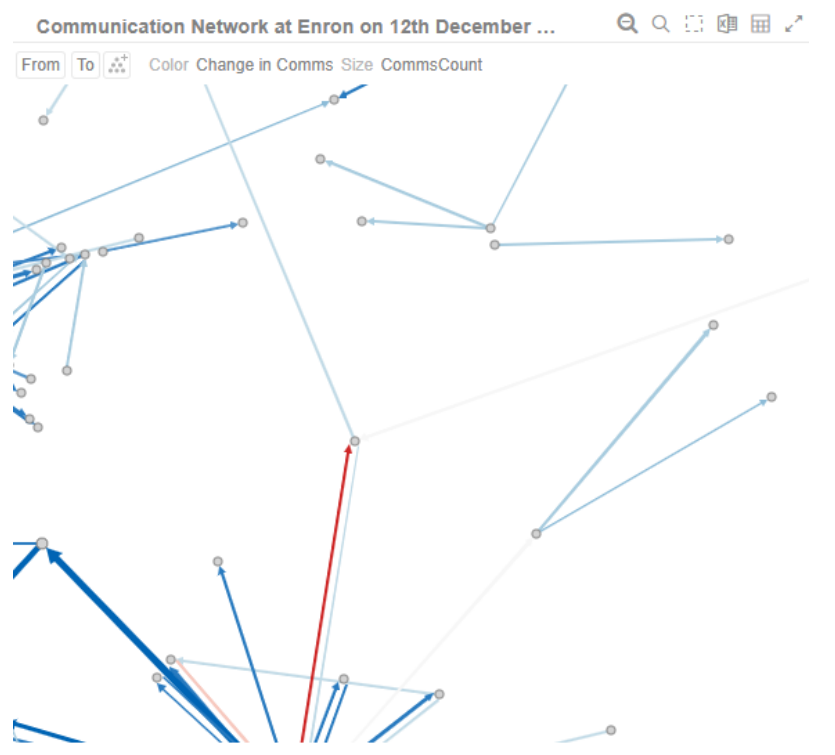
One mouse wheel rotation.



Slight zoom


Detailed Zoom

Several mouse wheel rotations.



Detailed zoom

Panning Around Within the Zoomed Area

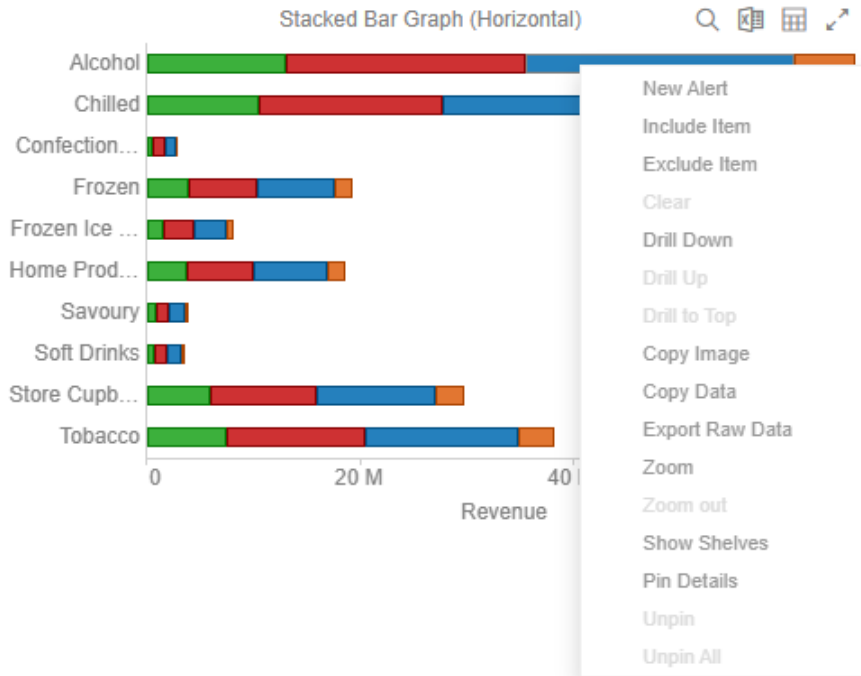
Clicking on the zoomed area turns the mouse pointer into . Drag the mouse to pan around the zoomed area.

Variable Visibility

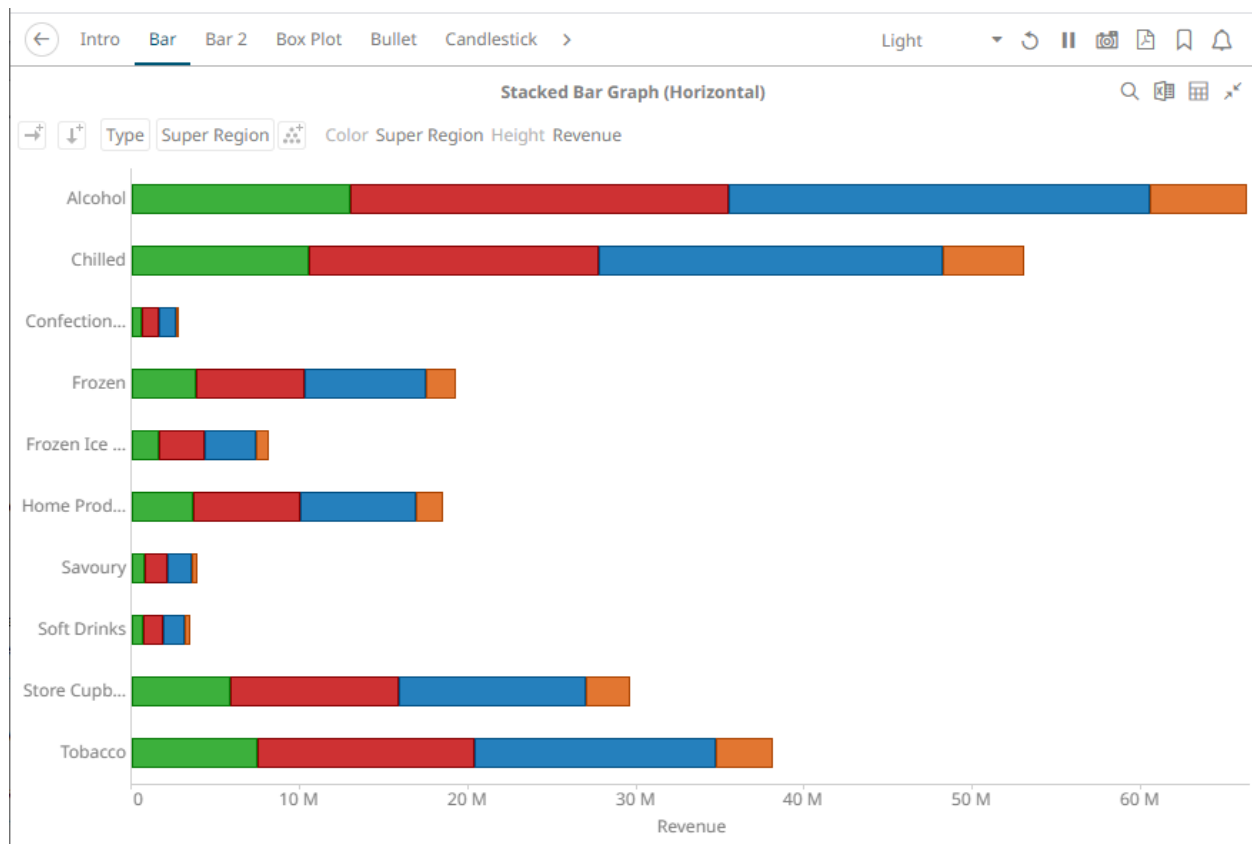
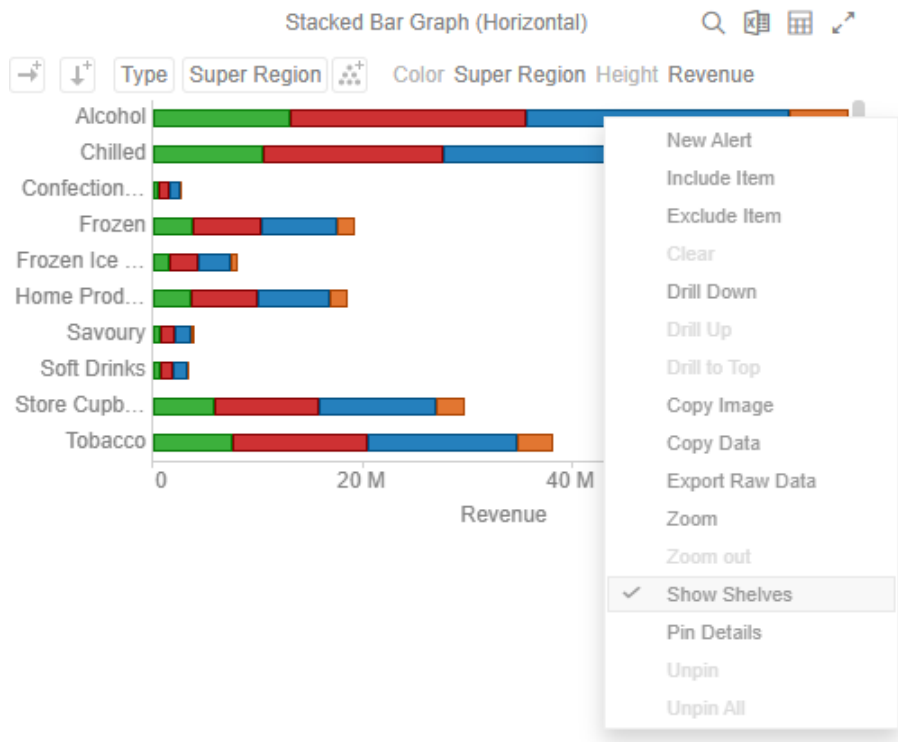
Variable visibility defines whether the visualization cross tab, breakdown, and variable shelves are displayed.

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

By default, *Show Shelves* is turned off.



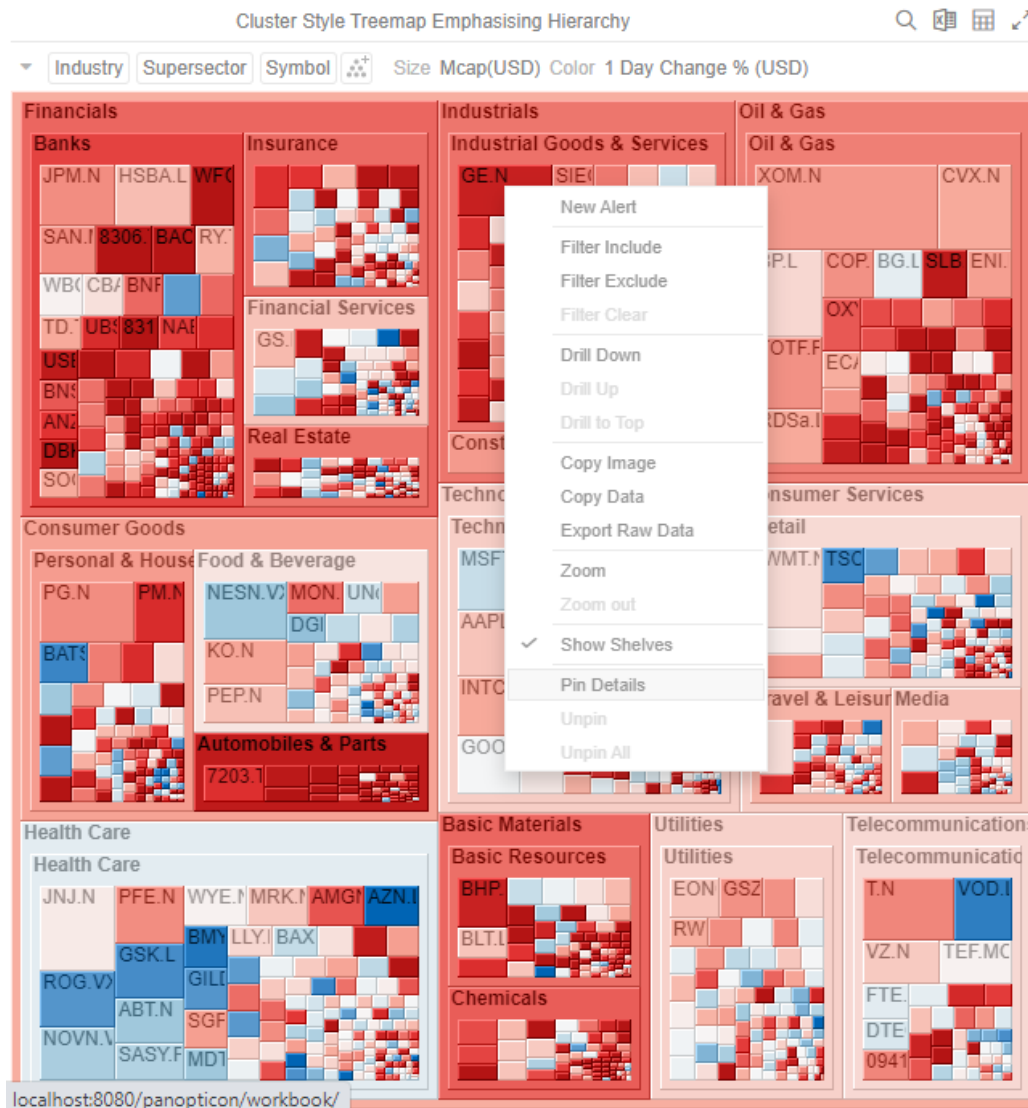
Click *Show Shelves* to select. The shelves are displayed on the visualization.



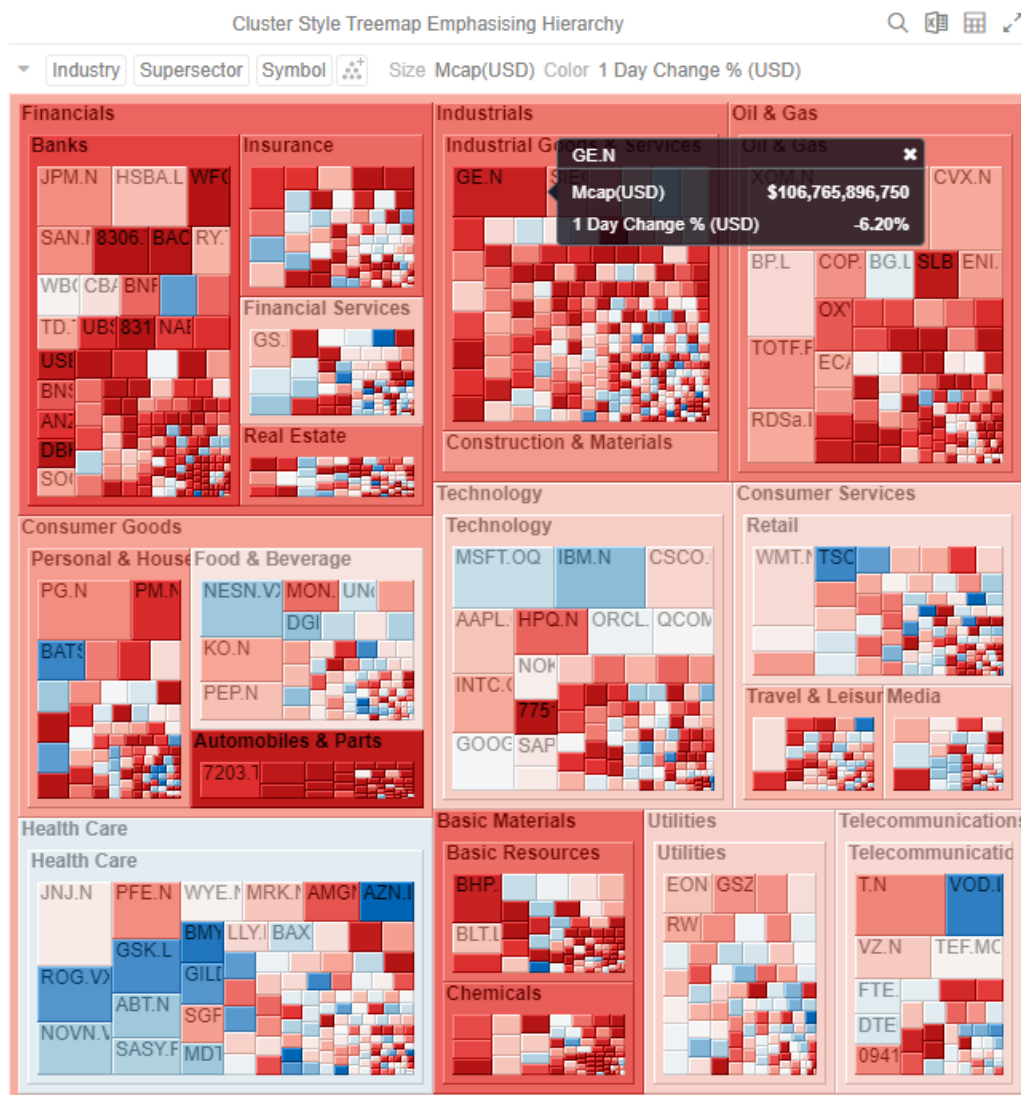
Pinning Details Pop-up

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.



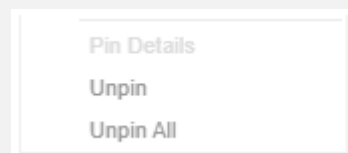
The *Details* pop-up is displayed and pinned.




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.



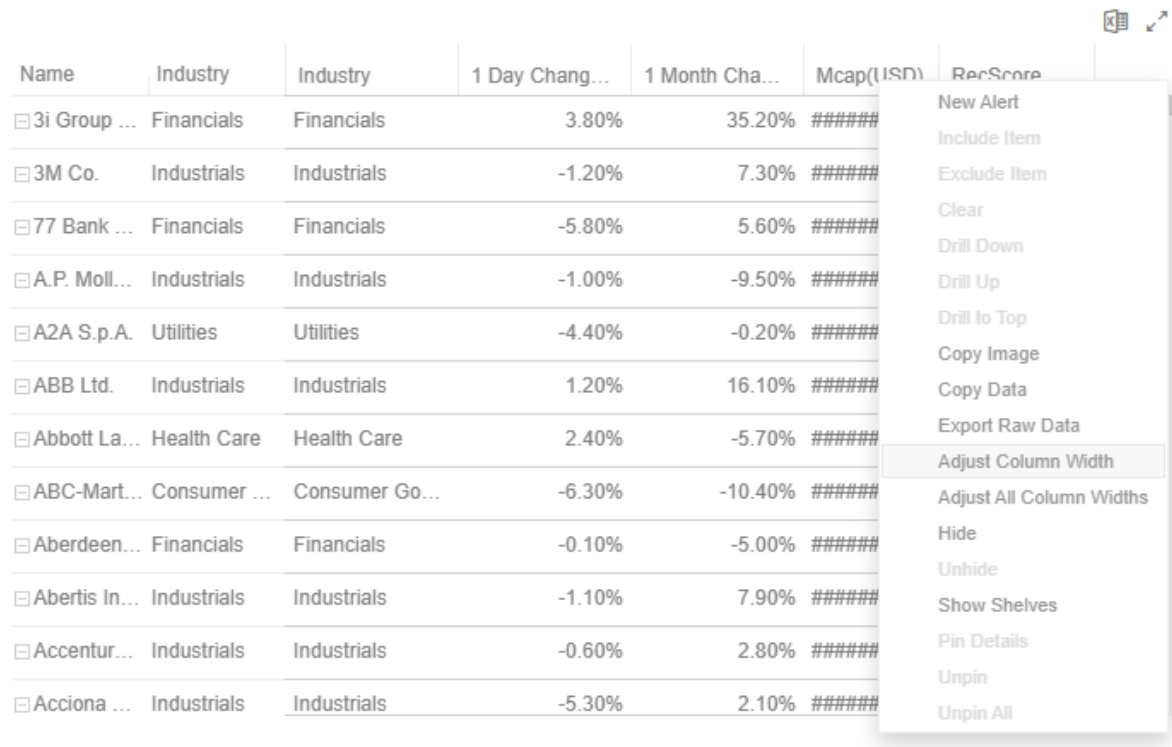
To unpin, you can either click  or right-click on the item and select **Unpin** on the context menu. Select **Unpin All** in the context menu to remove all of the pinned *Details* pop-up.

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. Molle... | 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 | ### |

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.

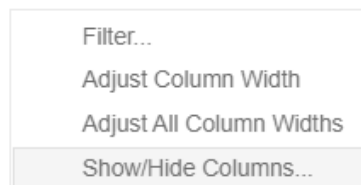
| Flat Table of Company Performance | | | | | | | | | | | | |
|-----------------------------------|--------------|-----------|-------------|------------------|------------------|------------------------|------------------|------------------------|------------------|------------------|--|--|
| Name | 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% | <div><div></div></div> | 35.23% | <div><div></div></div> | 18.95% | 1.98% | | |
| 3M Co. | 49.72 | ##### | -1.21% | 0.81% | 4.74% | <div><div></div></div> | 7.32% | <div><div></div></div> | -7.57% | -13.03% | | |
| 77 Bank Ltd. | 487.00 | ##### | -5.78% | -2.86% | 7.20% | <div><div></div></div> | 5.59% | <div><div></div></div> | -4.09% | -9.07% | | |
| A.P. Moller-Mae... | 24,600.00 | ##### | -1.02% | -8.09% | 7.04% | <div><div></div></div> | -9.46% | <div><div></div></div> | -9.22% | -17.78% | | |
| A2A S.p.A. | 1.14 | ##### | -4.40% | -0.11% | 14.14% | <div><div></div></div> | -0.15% | <div><div></div></div> | -12.93% | -15.59% | | |
| ABB Ltd. | 15.89 | ##### | 1.17% | -1.73% | 2.31% | <div><div></div></div> | 16.05% | <div><div></div></div> | 7.15% | -5.61% | | |
| Abbott Laboratories | 47.70 | ##### | 2.36% | -2.17% | -0.31% | <div><div></div></div> | -5.69% | <div><div></div></div> | -13.96% | -10.27% | | |
| ABC-Mart Inc. | 1,892.00 | ##### | -6.35% | -2.90% | 0.96% | <div><div></div></div> | -10.41% | <div><div></div></div> | -42.08% | -47.49% | | |
| Aberdeen Asset... | 1.27 | ##### | -0.13% | -9.46% | 0.76% | <div><div></div></div> | -5.04% | <div><div></div></div> | -1.54% | 21.50% | | |
| Abertis... | 11.77 | ##### | -1.06% | -4.02% | 6.69% | <div><div></div></div> | 7.89% | <div><div></div></div> | -3.98% | -12.32% | | |
| Accenture Ltd. CI A | 27.49 | ##### | -0.61% | -13.34% | -0.59% | <div><div></div></div> | 2.84% | <div><div></div></div> | -5.57% | -8.10% | | |
| Acciona S.A. | 77.45 | ##### | -5.29% | -11.98% | -2.86% | <div><div></div></div> | 2.09% | <div><div></div></div> | -9.33% | -18.31% | | |
| Accor S.A. | 26.22 | ##### | 1.21% | -10.59% | -18.10% | <div><div></div></div> | -19.79% | <div><div></div></div> | -24.82% | -39.71% | | |
| ACE Ltd. | 40.40 | ##### | 0.62% | 0.00% | 10.78% | <div><div></div></div> | 4.91% | <div><div></div></div> | -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% | <div><div></div></div> | 35.23% | <div><div></div></div> | 18.95% | 1.98% | | |
| 3M Co. | 49.72 | \$31,869,237,156 | -1.21% | 0.81% | 4.74% | <div><div></div></div> | 7.32% | <div><div></div></div> | -7.57% | -13.03% | | |
| 77 Bank Ltd. | 487.00 | \$1,855,149,668 | -5.78% | -2.86% | 7.20% | <div><div></div></div> | 5.59% | <div><div></div></div> | -4.09% | -9.07% | | |
| A.P. Moller-Mae... | 24,600.00 | \$4,742,697,140 | -1.02% | -8.09% | 7.04% | <div><div></div></div> | -9.46% | <div><div></div></div> | -9.22% | -17.78% | | |
| A2A S.p.A. | 1.14 | \$1,906,029,009 | -4.40% | -0.11% | 14.14% | <div><div></div></div> | -0.15% | <div><div></div></div> | -12.93% | -15.59% | | |
| ABB Ltd. | 15.89 | \$32,461,622,181 | 1.17% | -1.73% | 2.31% | <div><div></div></div> | 16.05% | <div><div></div></div> | 7.15% | -5.61% | | |
| Abbott Laboratories | 47.70 | \$73,392,451,232 | 2.36% | -2.17% | -0.31% | <div><div></div></div> | -5.69% | <div><div></div></div> | -13.96% | -10.27% | | |
| ABC-Mart Inc. | 1,892.00 | \$556,753,517 | -6.35% | -2.90% | 0.96% | <div><div></div></div> | -10.41% | <div><div></div></div> | -42.08% | -47.49% | | |
| Aberdeen Asset... | 1.27 | \$1,310,061,051 | -0.13% | -9.46% | 0.76% | <div><div></div></div> | -5.04% | <div><div></div></div> | -1.54% | 21.50% | | |
| Abertis... | 11.77 | \$4,574,542,373 | -1.06% | -4.02% | 6.69% | <div><div></div></div> | 7.89% | <div><div></div></div> | -3.98% | -12.32% | | |
| Accenture Ltd. CI A | 27.49 | \$17,063,968,693 | -0.61% | -13.34% | -0.59% | <div><div></div></div> | 2.84% | <div><div></div></div> | -5.57% | -8.10% | | |
| Acciona S.A. | 77.45 | \$2,628,978,079 | -5.29% | -11.98% | -2.86% | <div><div></div></div> | 2.09% | <div><div></div></div> | -9.33% | -18.31% | | |
| Accor S.A. | 26.22 | \$4,696,232,401 | 1.21% | -10.59% | -18.10% | <div><div></div></div> | -19.79% | <div><div></div></div> | -24.82% | -39.71% | | |
| ACE Ltd. | 40.40 | \$13,449,428,418 | 0.62% | 0.00% | 10.78% | <div><div></div></div> | 4.91% | <div><div></div></div> | -7.47% | -22.74% | | |

Hide or Display Columns in the Table Visualization

Table visual members can be hidden and displayed again. You can right-click on a column name and select **Show/Hide Columns**.



A column control pop-up displays.

☒ (Select All)

☒ Close(local)

☒ Mcap(USD)

☒ 1 Day Change % (USD)

☒ 1 Week Change % (USD)

☒ 2 Week Change % (USD)

☒ 2 Week Change % (USD)

☒ 1 Month Change % (USD)

☒ 1 Month Change % (USD)

☒ 2 Month Change % USD

☒ 3 Month Change % (USD)

Select the checkboxes of the columns that will be displayed.

Flat Table of Company Performance

| Name | 1 Day Change % (USD) | 1 Week Change % (USD) | 2 Week Chan... |
|--------------|----------------------|-----------------------|----------------|
| 3i Group PLC | 0.04 | 0.01 | |
| 3M Co. | -0.01 | 0.01 | |
| 77 Bank Ltd. | -0.06 | -0.03 | |
| A.P.... | -0.01 | -0.08 | |
| A2A S.p.A. | -0.04 | -0.05 | |
| ABB Ltd. | 0.01 | -0.02 | |
| Abbott... | 0.02 | -0.02 | |

☐ (Select All)

☐ Close(local)

☐ Mcap(USD)

☒ 1 Day Change % (USD)

☒ 1 Week Change % (USD)

☐ 2 Week Change % (USD)

☒ 2 Week Change % (USD)

☐ 1 Month Change % (USD)

☐ 1 Month Change % (USD)

☐ 2 Month Change % USD

☐ 3 Month Change % (USD)

You can also enter a value on the *Filter* box to search for certain columns. The **Select All** checkbox becomes **Select All Search Results**.

Hierarchical Table of Company Performance

▼

Industry

Supersector

Name

⌵

Industry

Supersector

Name

| | | | | | | | |
|-----------------------|-------|------------------|------|------|------|------|------|
| Grand Total | | | | | | | |
| Basic Materials Total | | | | | | | |
| Basic Resources Total | | | | | | | |
| Acerinox S.A. | | | | | | | |
| Agnico-Eagle... | 72.47 | 8,914,475,285.00 | 0.02 | 0.02 | 0.28 | 0.25 | 0.18 |
| Alcoa Inc. | 7.34 | 7,140,479,481.00 | 0.14 | 0.21 | 0.46 | 0.37 | 0.15 |

☒ (Select All Search Results)

☒ 1 Day

☒ 1 Week

☒ 1 Month

☒ 1 Month

Proceed in selecting the columns to hide or display.

Hierarchical Table of Company Performance

▼

Industry

Supersector

Name

⌵

⊞ Price & Value

⊞ Changes (in % USD)

| Industry | Supersector | Name | Close(local) | Mcap(USD) | 1 Day | 2 Week | 2 Week | 2 Month | 3 Month |
|-------------------------|-------------|-----------------|--------------|-----------------------|-------|--------|--------|---------|---------|
| Grand Total | | | | 14,776,798,934,247.00 | -0.02 | | | | |
| ⊞ Basic Materials Total | | | | 889,465,969,106.00 | -0.04 | | | | |
| ⊞ Basic Resources Total | | | | 512,851,697,625.00 | -0.04 | | | | |
| | | Acerinox S.A. | 8.75 | 1,488,375,565.00 | -0.01 | | | | |
| | | Agnico-Eagle... | 72.47 | 8,914,475,285.00 | 0.02 | | | | |
| | | Alcoa Inc. | 7.34 | 7,140,479,481.00 | 0.14 | 0.46 | | 0.15 | -0.17 |

1

☐ (Select All Search Results)



☒ 1 Day

☐ 1 Week

☐ 1 Month

☐ 1 Month

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% |
| Basic Materials Total | | | \$889,465,969,106 | -611.30% | -516.20% | 1726.50% |
| Consumer Goods Total | | | \$1,860,384,194,222 | -642.00% | -334.80% | 1518.80% |
| | 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 | ▼ | 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 | ↔ lose(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% | ↔ |
| Basic Materials Total | | | | \$889,465,969,106 | -3.74% | -3.74% | 7.13% | ▮ | 13.23% | ● | 8.88% | ↔ |
| Basic Resources Total | | | | \$512,851,697,625 | -3.60% | -3.60% | 10.14% | ▮ | 17.22% | ● | 13.80% | ↔ |
| Acerinox S.A. | | | 8.75 | \$1,488,375,565 | -1.23% | -11.55% | 3.70% | ▮ | 0.23% | ● | -11.47% | -2 |
| Agnico-Eagle Mines Ltd. | | | 72.47 | \$8,914,475,285 | 2.21% | 2.47% | 28.09% | ▮ | 25.48% | ● | 17.90% | 2 |
| Alcoa Inc. | | | 7.34 | \$7,140,479,481 | 14.39% | 20.57% | 45.79% | ▮ | 37.05% | ● | 14.53% | -1 |
| Allegheny Technologies Inc. | | | 21.93 | \$2,011,309,511 | -6.84% | -3.14% | 5.62% | ▮ | 11.02% | ● | 0.31% | ↔ |
| Alumina Ltd. | | | 1.28 | \$1,310,698,840 | 3.28% | 5.10% | 34.54% | ▮ | 13.99% | ● | 22.68% | -1 |
| Anglo American PLC | | | 11.86 | \$22,812,823,982 | -0.68% | -14.15% | 4.66% | ▮ | 15.36% | ● | -6.86% | -2 |
| Antofagasta PLC | | | 5.04 | \$2,805,252,436 | -2.16% | -11.08% | -1.57% | ▮ | 8.92% | ● | 19.42% | 1 |
| ArcelorMittal | | | 15.28 | \$15,023,575,434 | -4.83% | 1.54% | 8.74% | ▮ | -1.33% | ● | -10.61% | -1 |
| Arch Coal Inc. | | | 13.37 | \$1,914,166,642 | -6.96% | -13.57% | -2.48% | ▮ | -3.81% | ● | -11.98% | -1 |

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% | -3.74% | 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% | -4.82% | 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% | -9.46% | 2.67% | | 5.94% | | 9.44% | -5.66% |

| Flat Table of Company Performance | | | | | | | | | | |
|-----------------------------------|--------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Name | Close(local) | Mcap(USD) | 1 Day Change ... | 1 Week Change... | 1 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% | -8.09% | 7.04% | | -9.46% | | -17.78% |
| A2A S.p.A. | 1.14 | \$1,906,029,009 | -4.40% | -3.74% | -3.74% | 14.14% | | -0.15% | | -15.59% |
| ABB Ltd. | 15.89 | \$32,461,622,181 | 1.17% | -1.73% | -1.73% | 2.31% | | 16.05% | | -5.61% |
| Abbott Laboratories | 47.70 | \$73,392,451,232 | 2.36% | -2.17% | -2.17% | -0.31% | | -5.69% | | -10.27% |
| ABC-Mart Inc. | 1,892.00 | \$556,753,517 | -6.35% | -2.90% | -2.90% | 0.96% | | -10.41% | | -47.49% |
| Aberdeen Asset... | 1.27 | \$1,310,061,051 | -0.13% | -9.46% | -9.46% | 0.76% | | -5.04% | | 21.50% |
| Abertis... | 11.77 | \$4,574,542,373 | -1.06% | -4.82% | -4.82% | 6.69% | | 7.89% | | -12.32% |
| Accenture Ltd. CI A | 27.49 | \$17,063,968,693 | -0.61% | -13.34% | -13.34% | -0.59% | | 2.84% | | -8.10% |
| Acciona S.A. | 77.45 | \$2,628,978,079 | -5.29% | -11.98% | -11.98% | -2.86% | | 2.09% | | -18.31% |
| Accor S.A. | 26.22 | \$4,696,232,401 | 1.21% | -10.59% | -10.59% | -18.10% | | -19.79% | | -39.71% |
| ACE Ltd. | 40.40 | \$13,449,428,418 | 0.62% | 0.00% | 0.00% | 10.78% | | 4.91% | | -22.74% |
| Acergy S.A. | 42.10 | \$1,138,612,378 | -6.62% | -12.02% | -12.02% | 6.15% | | 16.19% | | 11.93% |
| Acerinox S.A. | 8.75 | \$1,488,375,565 | -1.23% | -11.55% | -11.55% | 3.70% | | 0.23% | | -27.76% |
| Arkerms & Van | 36.18 | \$1,078,072,552 | -1.01% | -9.46% | -9.46% | 2.67% | | 5.94% | | -5.66% |

| Flat 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% | 7.04% | -9.46% | -8.09% | ● | -9.22% | -17.78% |
| A2A S.p.A. | 1.14 | \$1,906,029,009 | -4.40% | 14.14% | 14.14% | -0.15% | -5.01% | ● | -12.93% | -15.59% |
| ABB Ltd. | 15.89 | \$32,461,622,181 | 1.17% | 2.31% | 2.31% | 16.05% | -1.73% | ● | 7.15% | -5.61% |
| Abbott Laboratories | 47.70 | \$73,392,451,232 | 2.36% | -0.31% | -0.31% | -5.69% | -2.17% | ● | -13.96% | -10.27% |
| ABC-Mart Inc. | 1,892.00 | \$556,753,517 | -6.35% | 0.96% | 0.96% | -10.41% | -2.90% | ● | -42.08% | -47.49% |
| Aberdeen Asset... | 1.27 | \$1,310,061,051 | -0.13% | 0.76% | 0.76% | -5.04% | -9.46% | ● | -1.54% | 21.50% |
| Abertis... | 11.77 | \$4,574,542,373 | -1.06% | 6.69% | 6.69% | 7.89% | -4.02% | ● | -3.98% | -12.32% |
| Accenture Ltd. CI A | 27.49 | \$17,063,968,693 | -0.61% | -0.59% | -0.59% | 2.84% | -13.34% | ● | -5.57% | -8.10% |
| Acciona S.A. | 77.45 | \$2,628,978,079 | -5.29% | -2.86% | -2.86% | 2.09% | -11.98% | ● | -9.33% | -18.31% |
| Accor S.A. | 26.22 | \$4,696,232,401 | 1.21% | -18.10% | -18.10% | -19.79% | -10.59% | ● | -24.82% | -39.71% |
| ACE Ltd. | 40.40 | \$13,449,428,418 | 0.62% | 10.78% | 10.78% | 4.91% | 0.00% | ● | -7.47% | -22.74% |
| Acergy S.A. | 42.10 | \$1,138,612,378 | -6.62% | 6.15% | 6.15% | 16.19% | -12.02% | ● | 12.51% | 11.93% |
| Acerinox S.A. | 8.75 | \$1,488,375,565 | -1.23% | 3.70% | 3.70% | 0.23% | -11.55% | ● | -11.47% | -27.76% |
| Arkemans & Van | 36.18 | \$1,078,072,552 | -1.01% | 2.67% | 2.67% | 5.94% | -4.40% | ● | 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 | 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% |
| MAERSK.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. CI 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 | Acergy 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 | 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-Servicos 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 | -4.1% | -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.

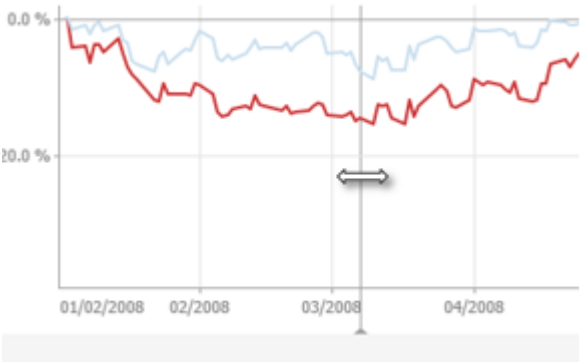


The snapshot will be set for the selected time.

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.

Line Graph

→ Columns

↓ Rows

Items

↑ Y

↔ Time Axis

Color

Alpha

Ref Lines

Details

Filters

Options

| | |
|----------------------|--------------------------|
| Axis Bar Thickness | 25 |
| Preferred Tick Space | 100 |
| Style | One Row |
| End Points | Automatic |
| Tick Points | Automatic |
| Align to Time Window | <input type="checkbox"/> |
| Zero Grid Line | None |
| Snapshot Grid Line | None |
| Minor Grid Line | None |
| Visible Periods | Dotted |
| Min Range | Dashed |
| Increment Step | Solid |

Visualization Header Controls

Header controls are made available in visualizations when the **Header Controls** option is turned on by the workbook designer.

Y-Axis Graph

→ Columns

↓ Rows

↕ Y

↔ X

💬 Tooltip

🎨 Style

🔍 Filters

⚙️ Options

General

Sync

Title

Stacked Bar Graph (Horizontal)

🗑️

+ Add Title Row

Dashboard Part ID

visualization.VerticalGraph3

Data Table

basicbargraphs

▼

Header Controls

🔴

Floating

Fixed

Enable Shelves

🔴

Shelves

⚪

Visible Shelves

✓ Rows

✓ Columns

Show Coordinates

⚪

Header controls may include:

| Header Control | Description |
|---|---|
| Rubber Band Zoom 🔍 | Allows zooming in on multiple items of interest in a visualization. |
| Rubber Band Selection 📏 | Allows multiple items in a visualization to be selected or lassoed. |
| Export Excel 📄 | Exports static visualizations to a CSV-format file. |
| Toggle Display Mode 📊 | Displays a visualization as a table and vice versa. |

[Maximize](#)



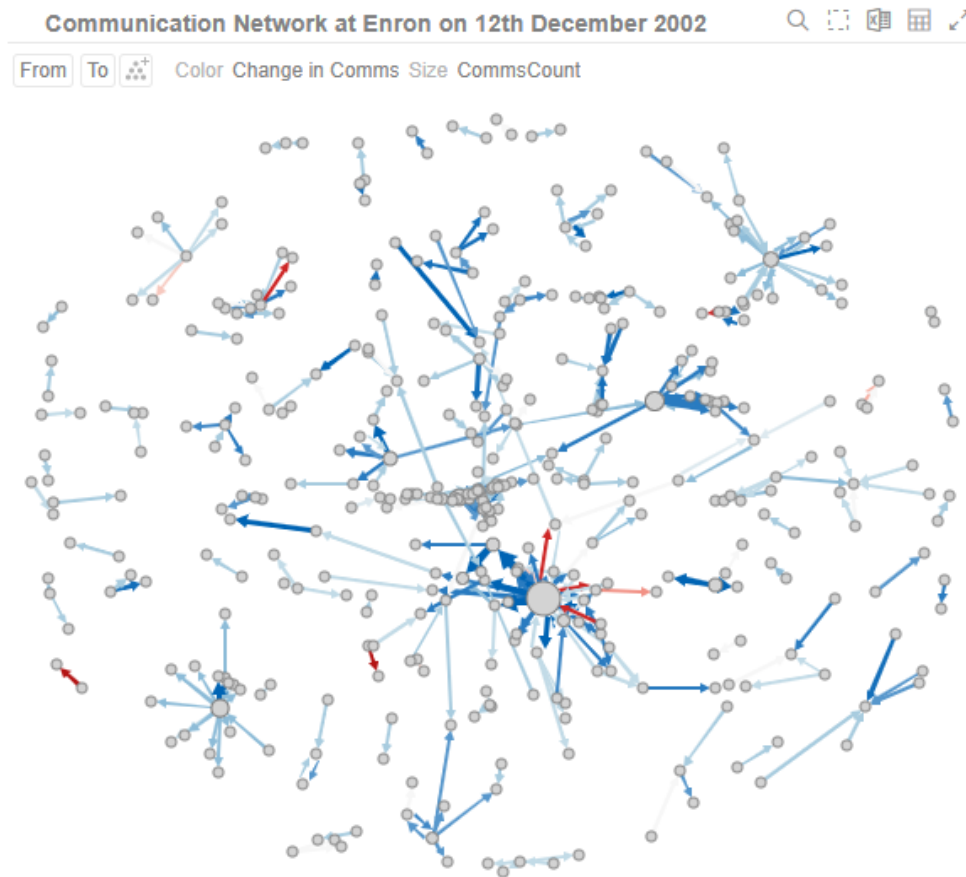
Maximizes the visualization to be displayed on the full dashboard area.

Exporting to Excel (TSV-format) of Visualizations

Click the **Export Excel**  icon of a static visualization. A copy of the CSV-format file is downloaded.

Toggling Between a Visualization and a Table

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



It will be replaced with a Table visualization.

Communication Network at Enron on 12th December 2002



| 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.

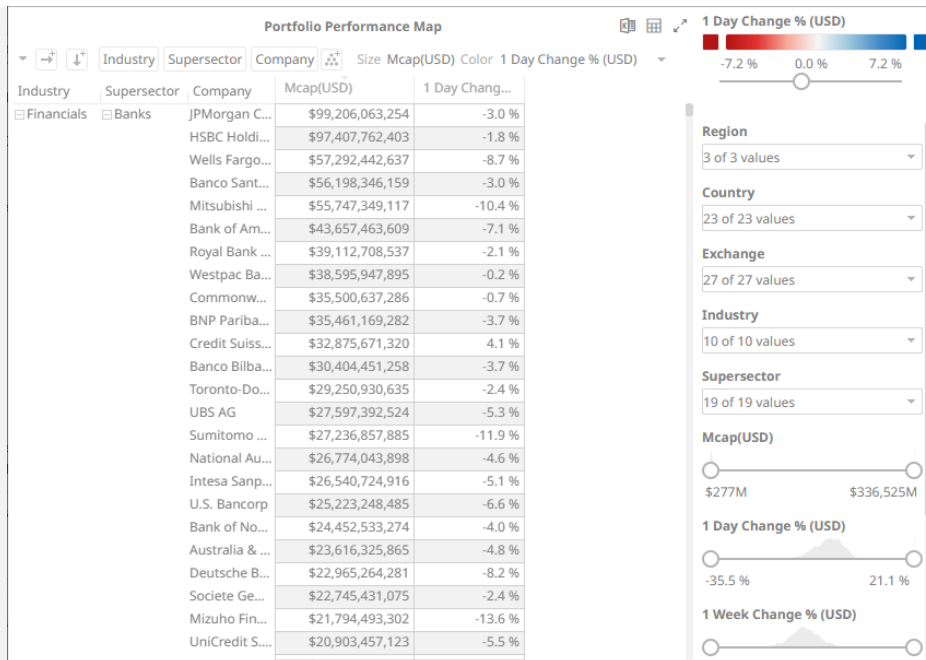
NOTE

The Table will default to displaying zebra stripes.

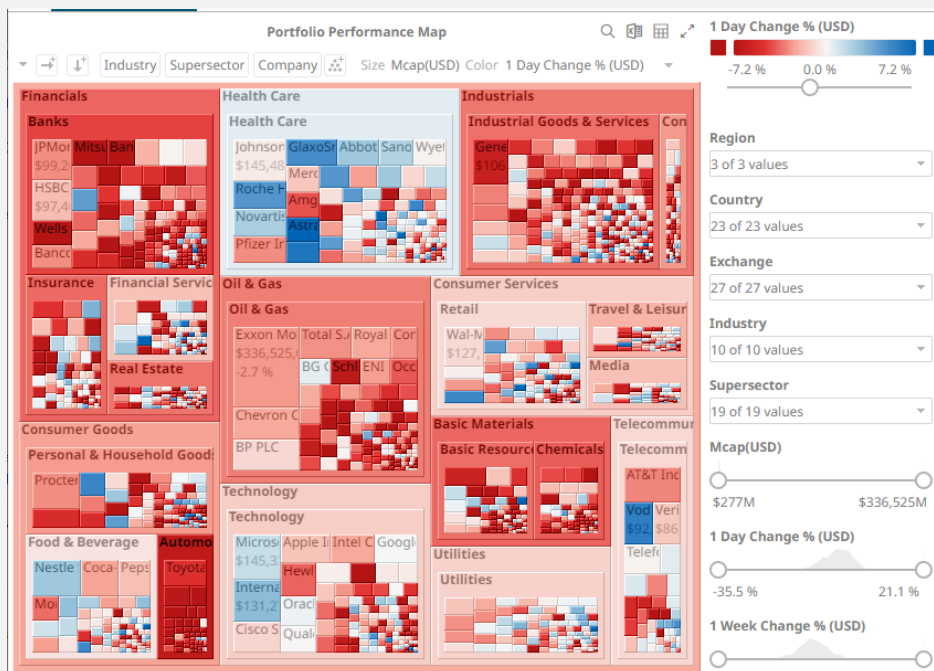
When the **Toggle Display Mode** icon is clicked again, the Table will toggle back to the original visualization.

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

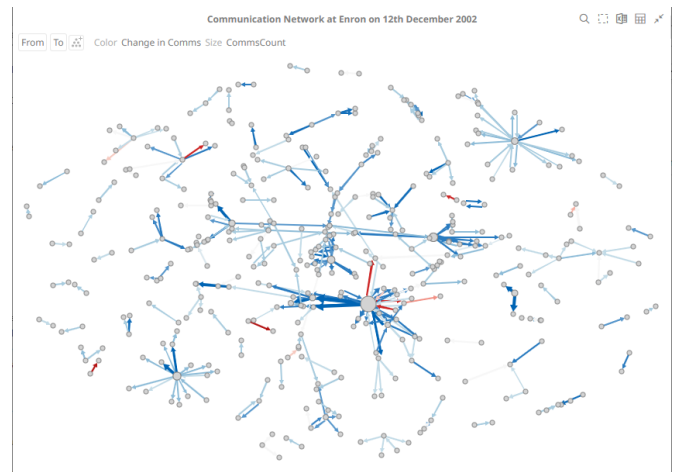
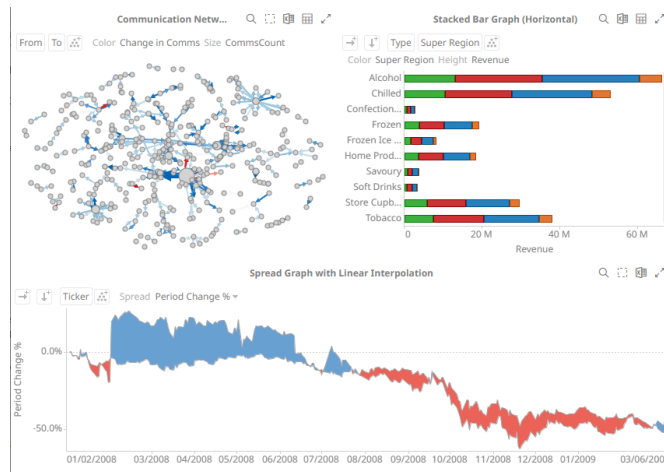


Consequently, toggling back will then display the filtered view of the visualization. The example below will only display Basic Materials and Telecommunications.



Maximize

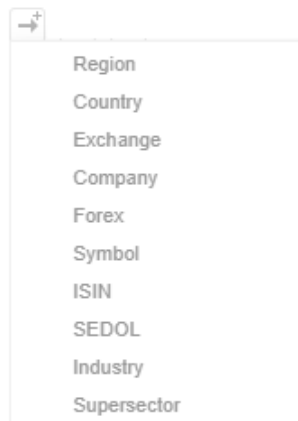
Visualizations can be maximized to display the full dashboard area by clicking the **Maximize** icon. To return to normal, click the visualization **Restore** icon.



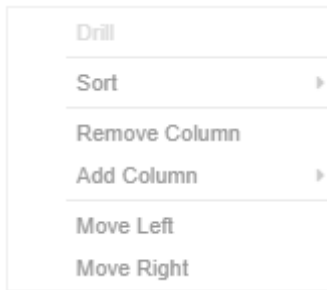
Drilling Into, Sorting, Removing, Adding, and Swapping Columns in a Breakdown and Cross Tab Points

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.

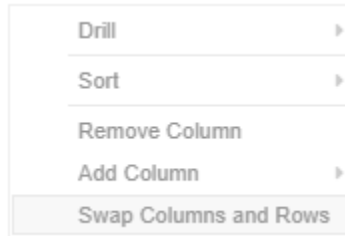
For example:



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



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

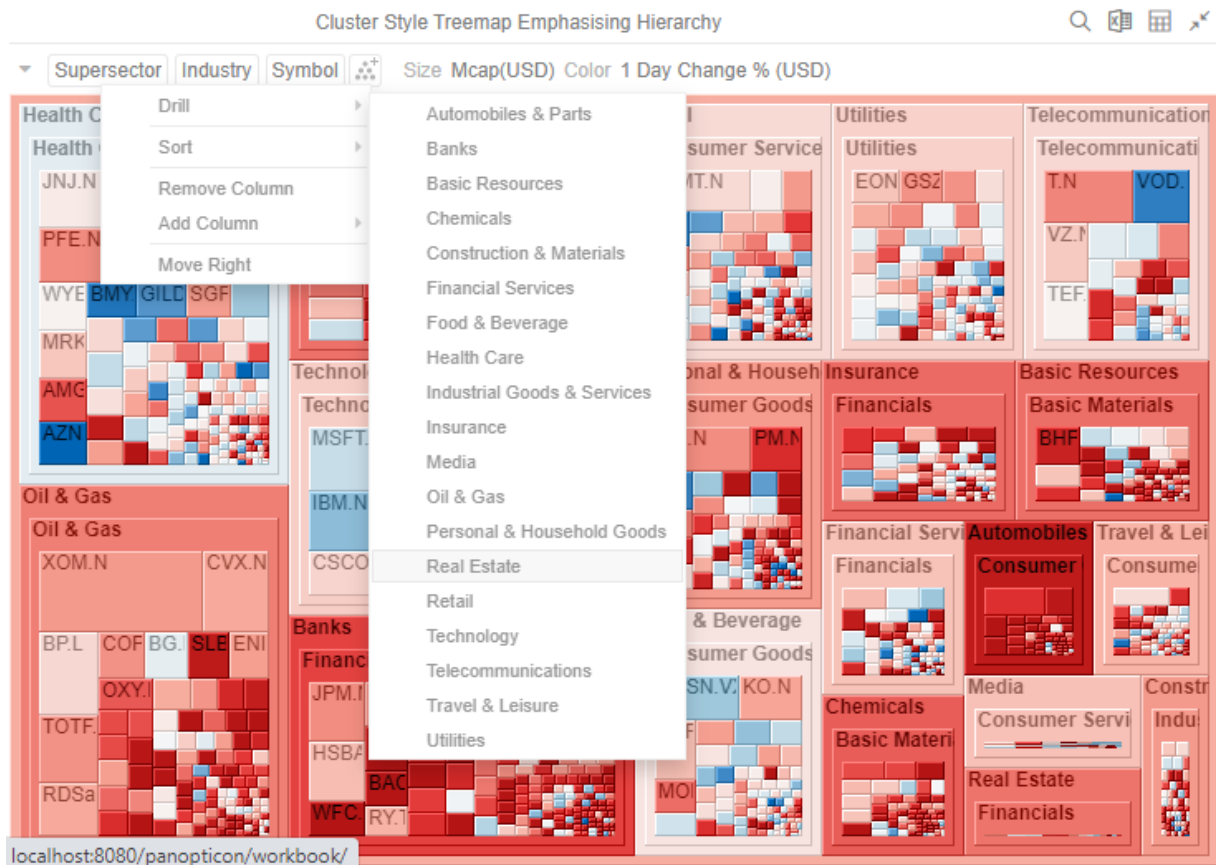


Drilling into Hierarchy Displays

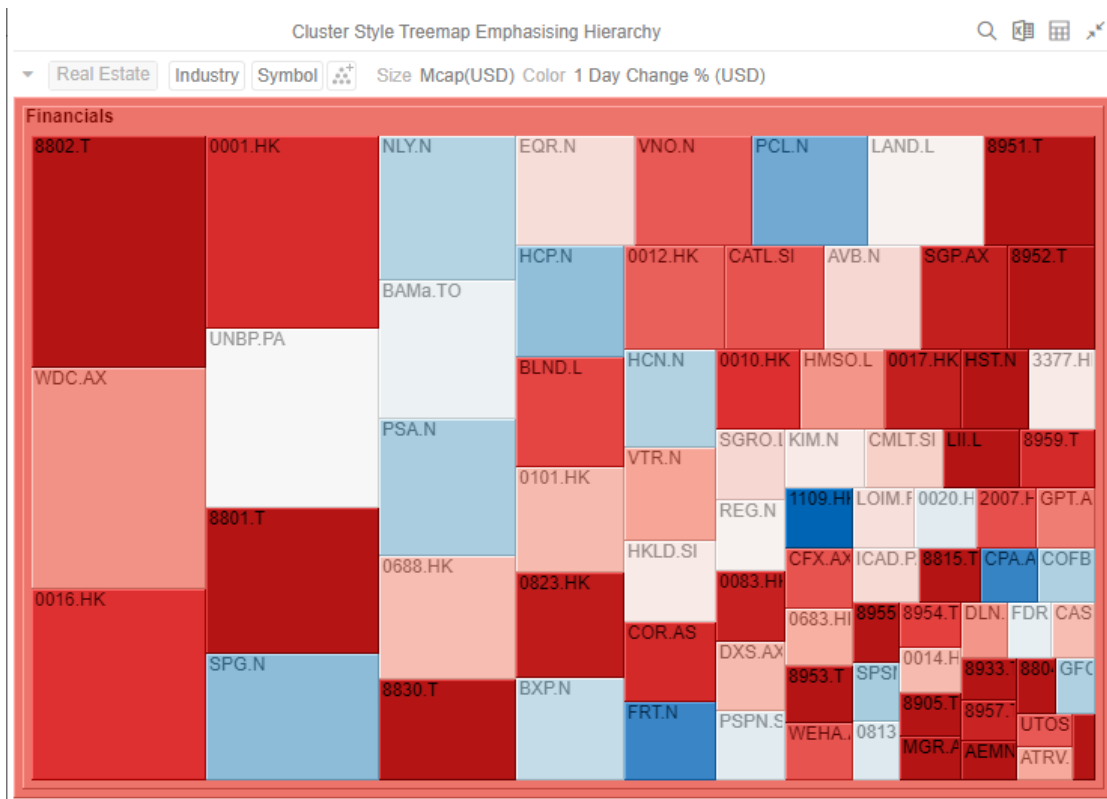
You can drill into cross tab columns, cross tab rows, and breakdown columns.

Steps:

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



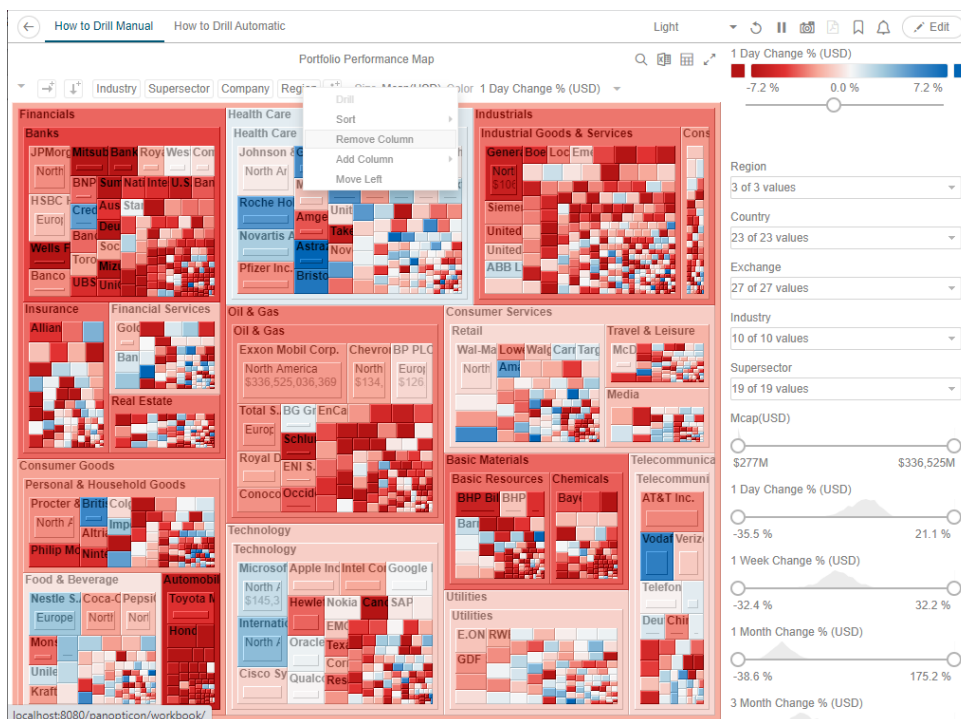
The selected level will appear gray.



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

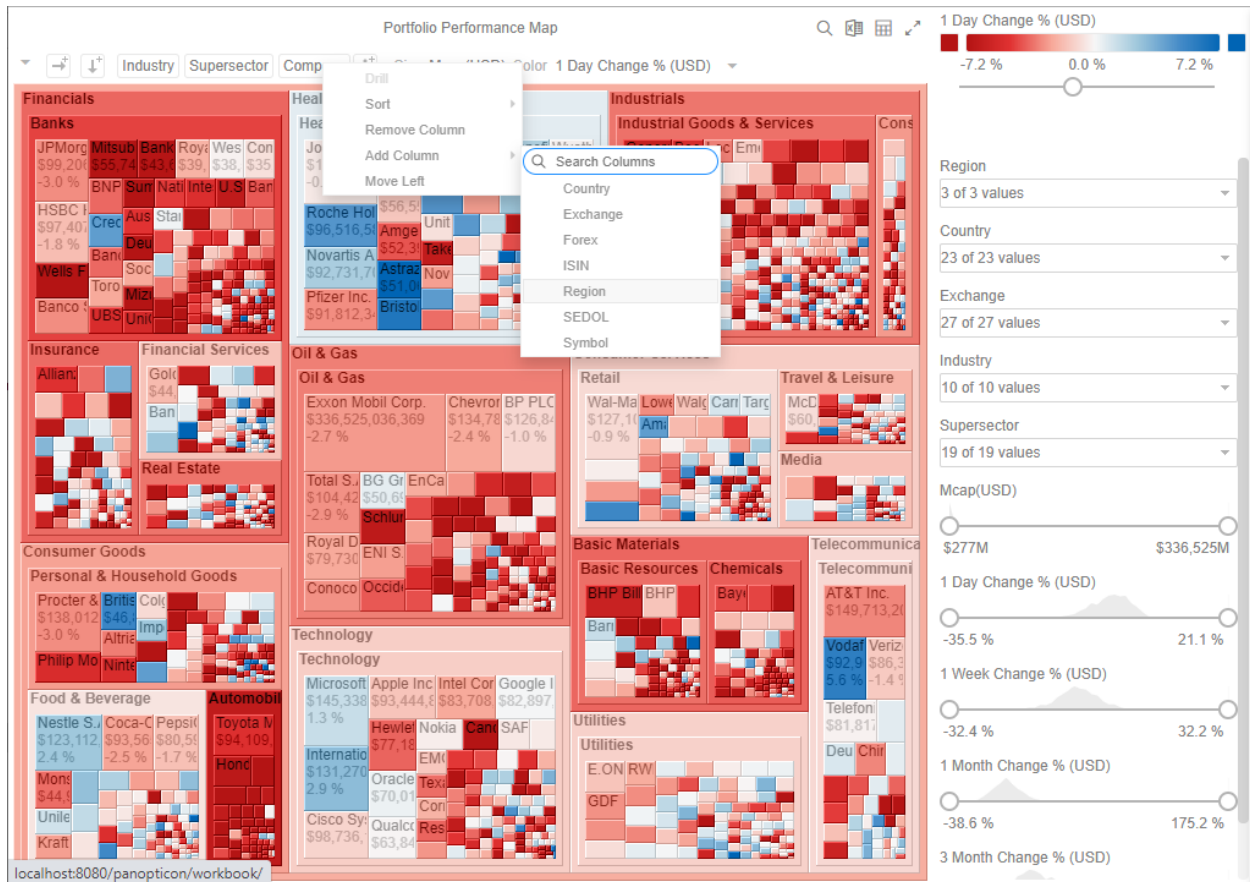
Removing Breakdown or Cross Tab Columns

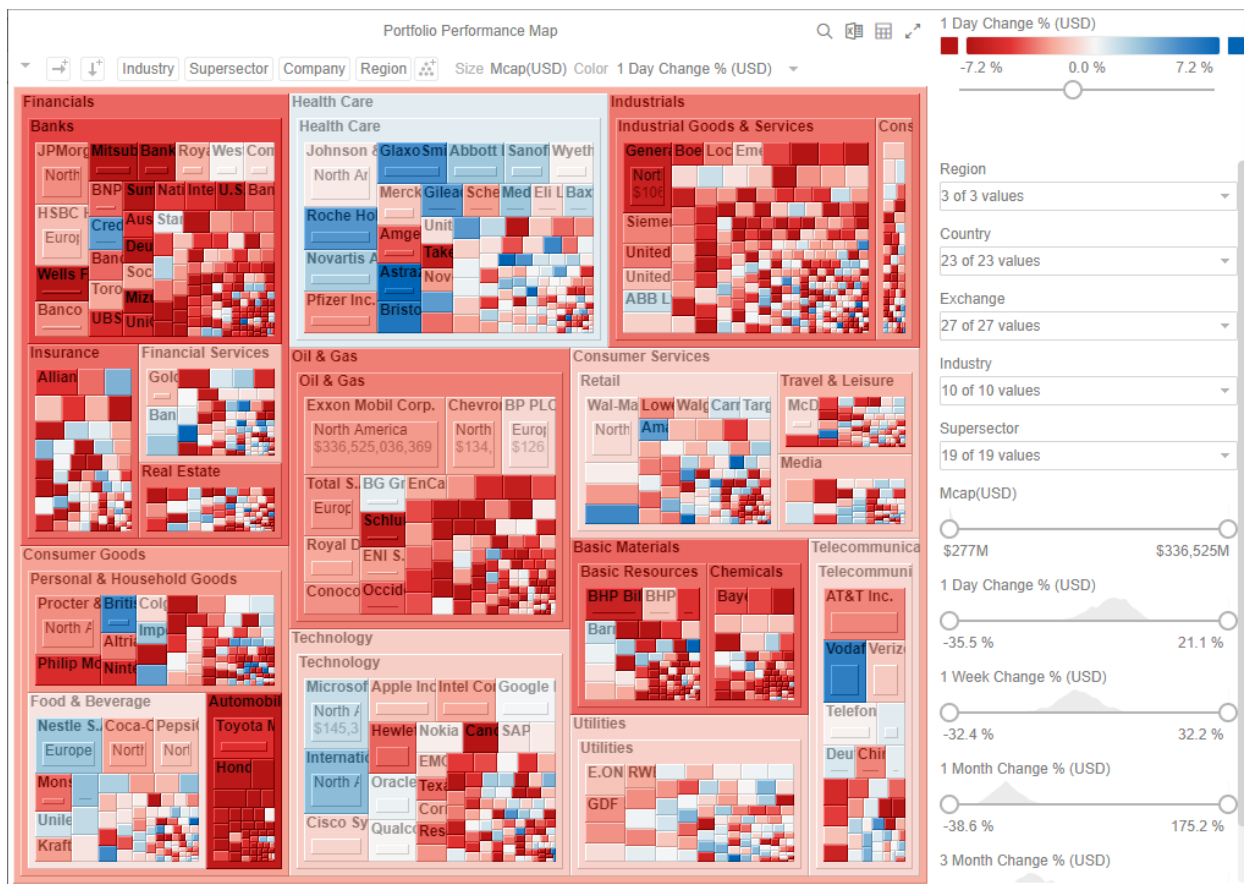
Right-click on a column and select **Remove Column** on the context menu.



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*.





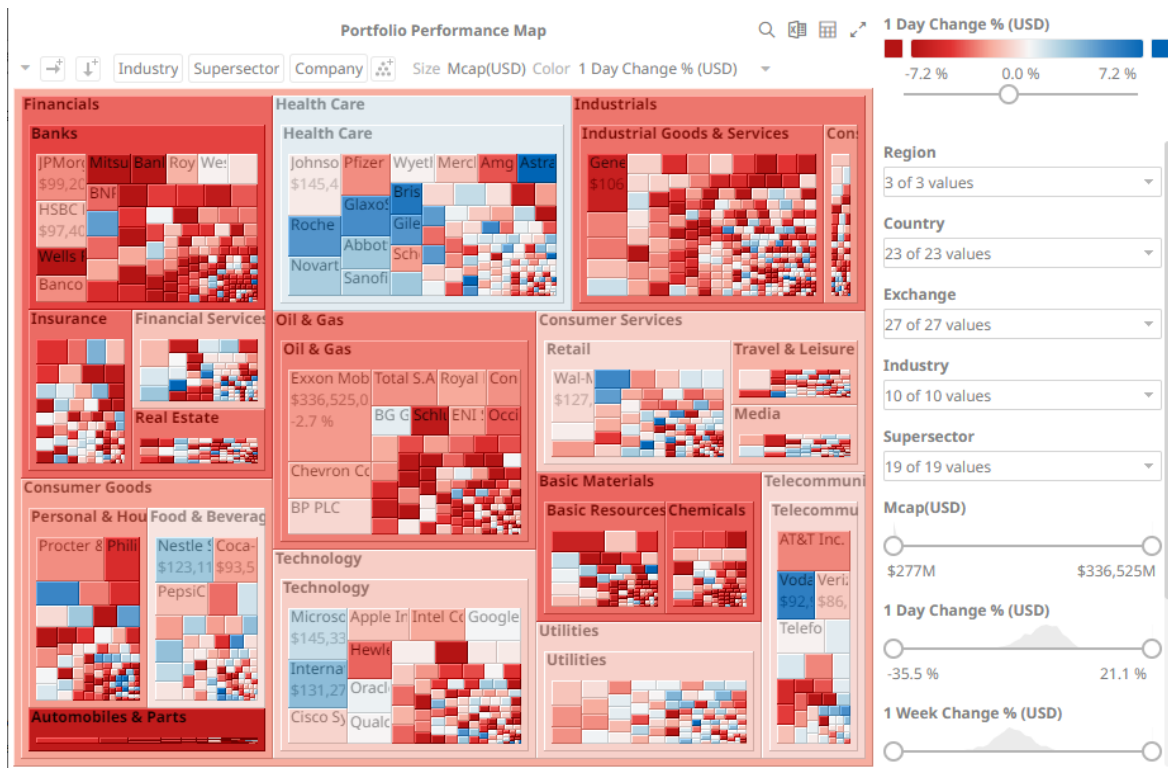
Moving Breakdown Columns

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

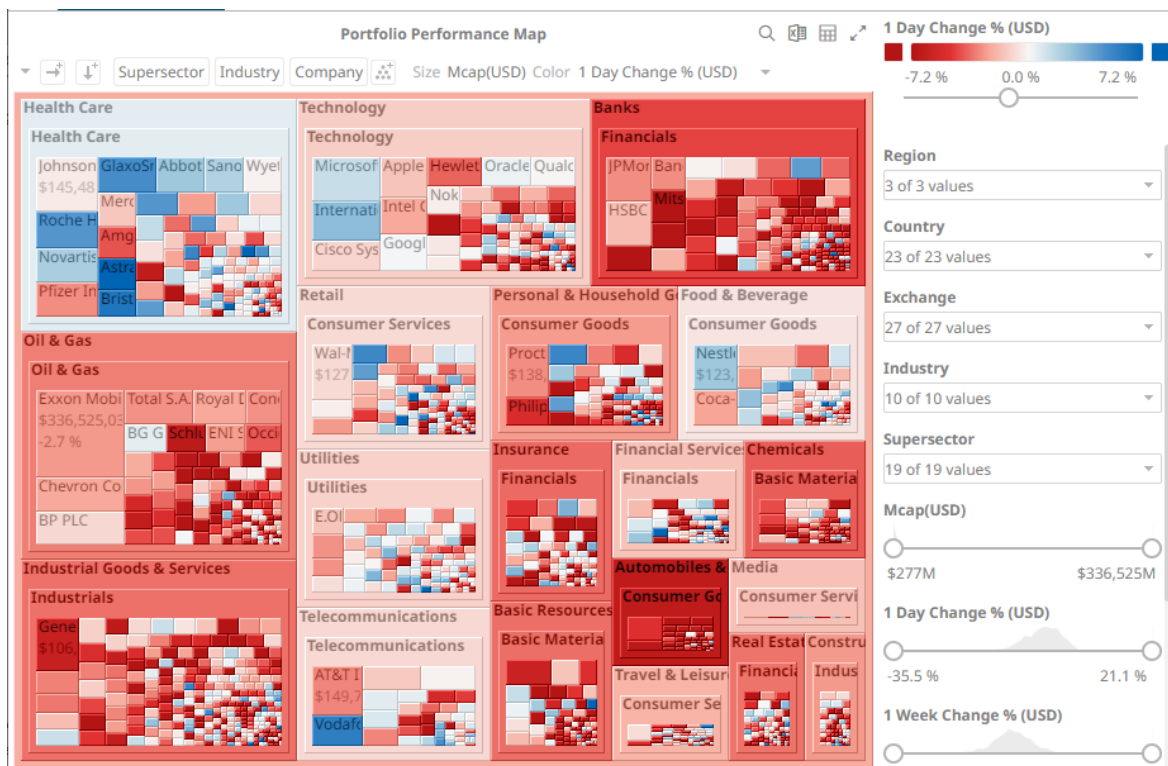
Right-click on a breakdown column and select **Move Right** or **Move Left** on the context menu.

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.

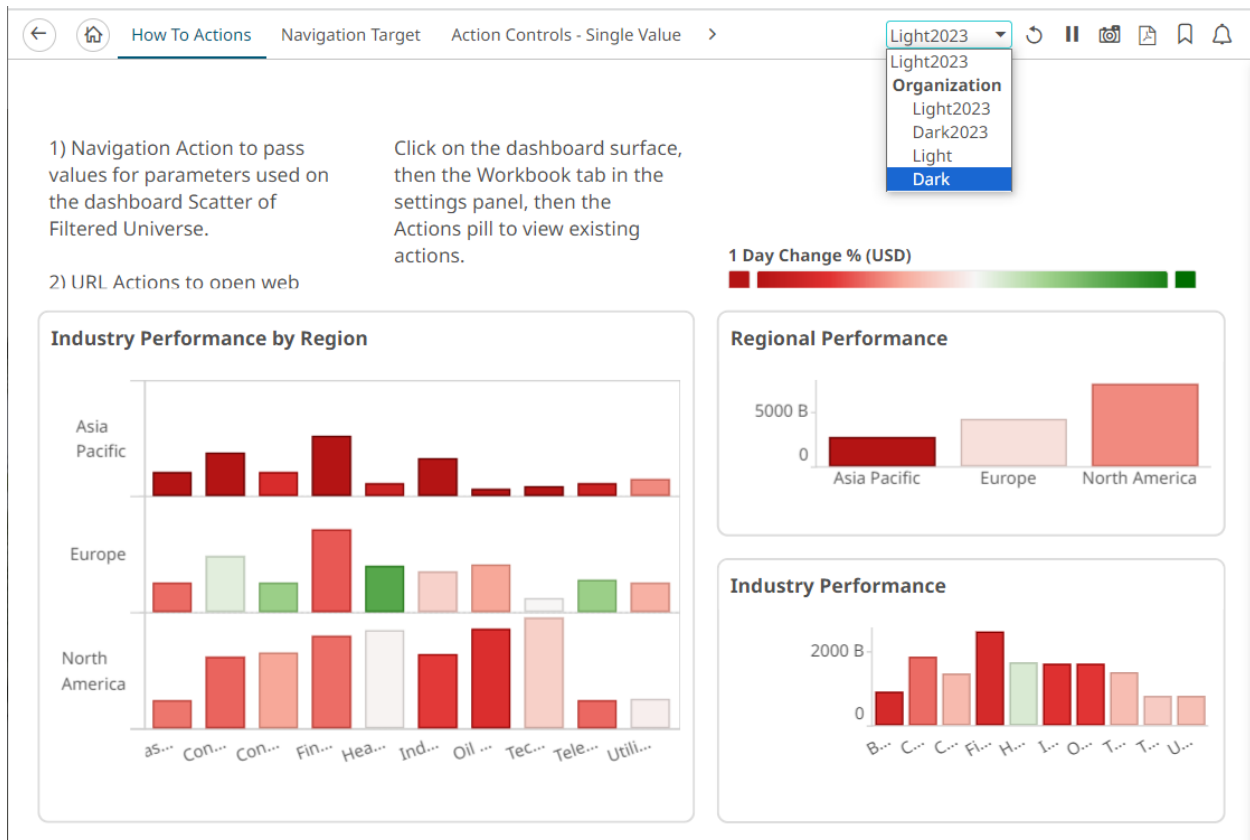
In a visualization that is cross tabbed, right-click on row or column and select **Swap Columns and Rows** on the context menu.

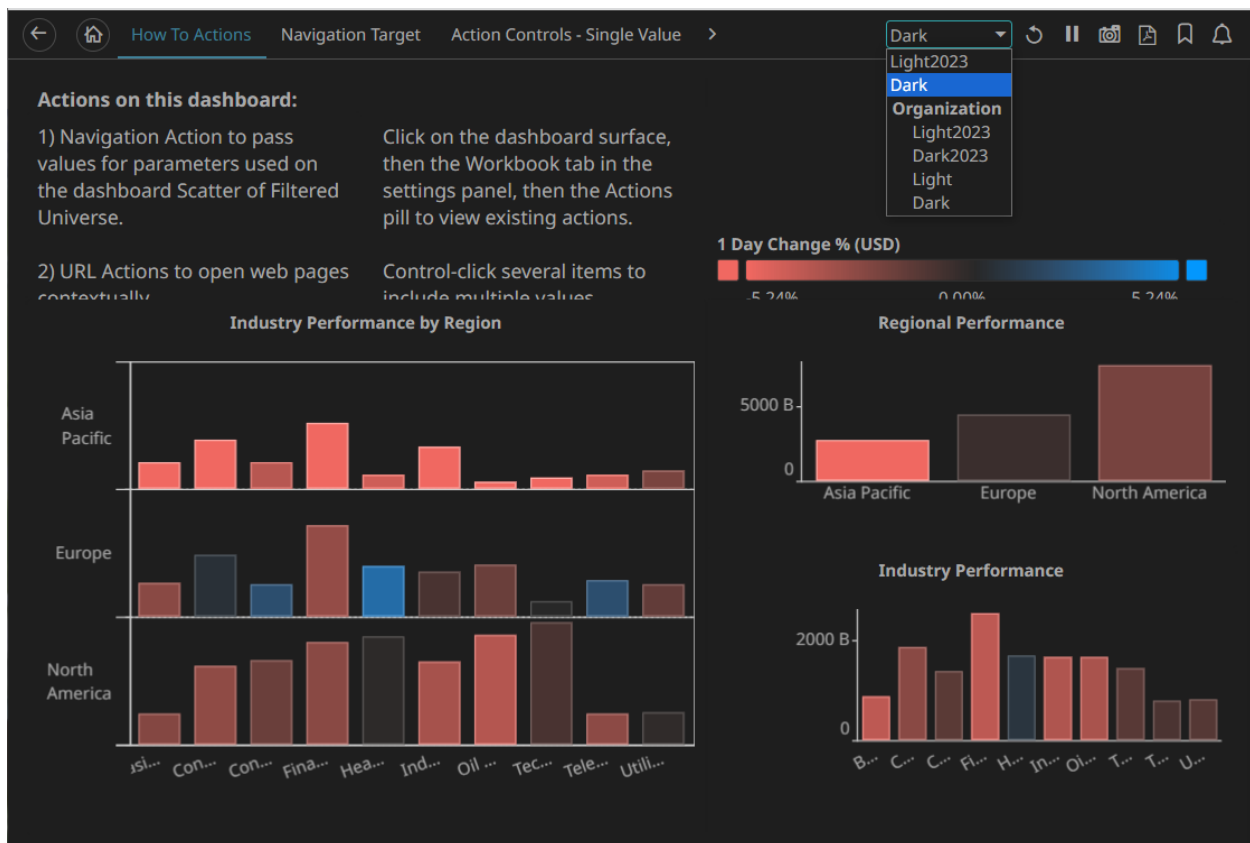
The rows and columns will be swapped in the *Columns* or *Rows* section of the visualization.

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

You can dynamically switch to other workbook themes.












WORKBOOK TOOLBAR


An opened workbook has several toolbar options:

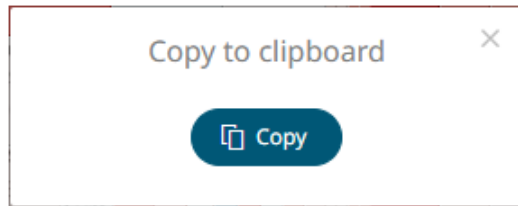


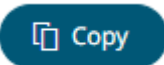
| Toolbar Option | Description |
|---|--|
| Data Refresh  | Manually refreshes the data. |
| Pause Real-Time  | Clicking the icon changes it to  and pauses the streaming data sources. |
| Copy Image  | Exports the whole dashboard image to the clipboard. |
| Create PDF Report  | Set the dashboards that will be included in the PDF report. |
| Bookmarks  | Add and manage bookmarks. |
| Alerts  | Manage alerts and notifications. |

Copying Dashboard Image

Steps:

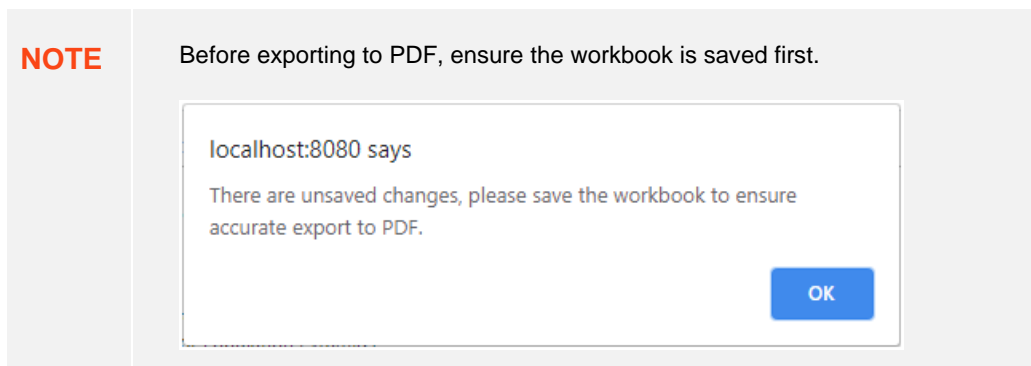
1. Click the **Copy Image**  icon on the toolbar.
The **Copy to Clipboard** button displays.



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

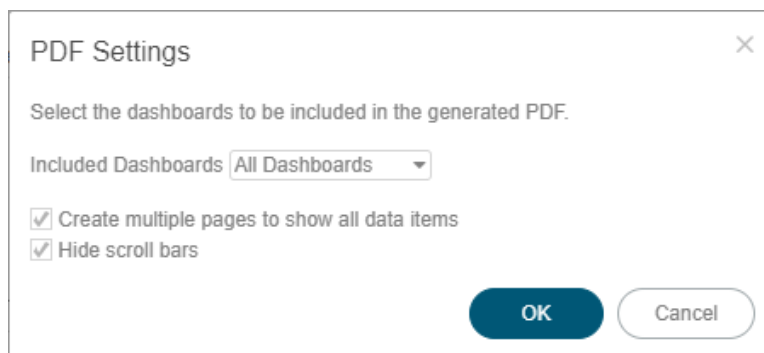
Ad Hoc PDF Generation

Select the dashboards to be included in the generated PDF.



Steps:

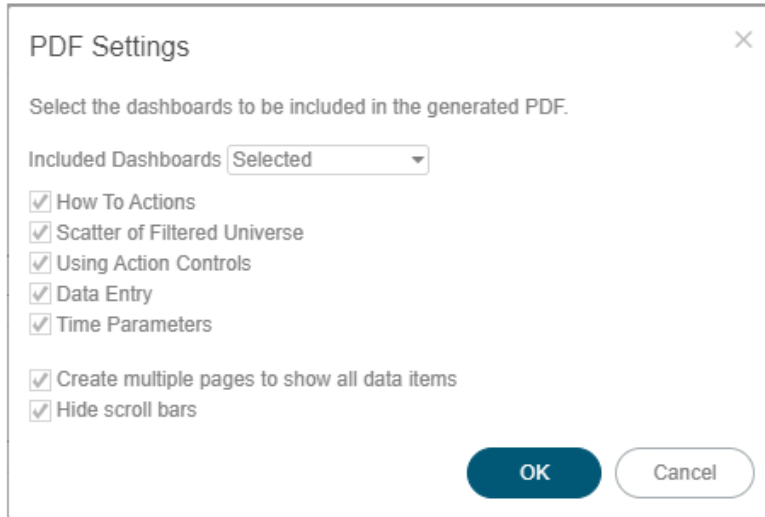
1. Click the **Create PDF Report**  icon on the toolbar.
The *PDF Settings* dialog displays.



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.




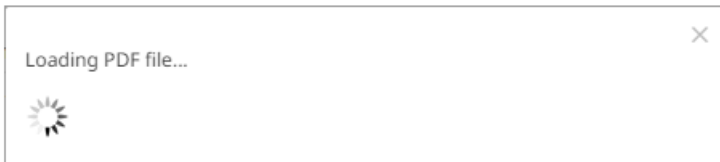
The dialog box is titled "PDF Settings" and has a close button (X) in the top right corner. Below the title, it says "Select the dashboards to be included in the generated PDF." There is a dropdown menu labeled "Included Dashboards" with "Selected" chosen. Below this are several checkboxes, all of which are checked: "How To Actions", "Scatter of Filtered Universe", "Using Action Controls", "Data Entry", "Time Parameters", "Create multiple pages to show all data items", and "Hide scroll bars". At the bottom right, there are two buttons: "OK" (in a dark blue rounded rectangle) and "Cancel" (in a light gray rounded rectangle).

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.




The dialog box is titled "Loading PDF file..." and has a close button (X) in the top right corner. Below the title, there is a loading spinner icon (a circle with eight radiating lines) and the text "Loading PDF file...".

This will allow the Panopticon Real Time to read all the datasets necessary to output the dashboard and produce the PDF file.


NOTE

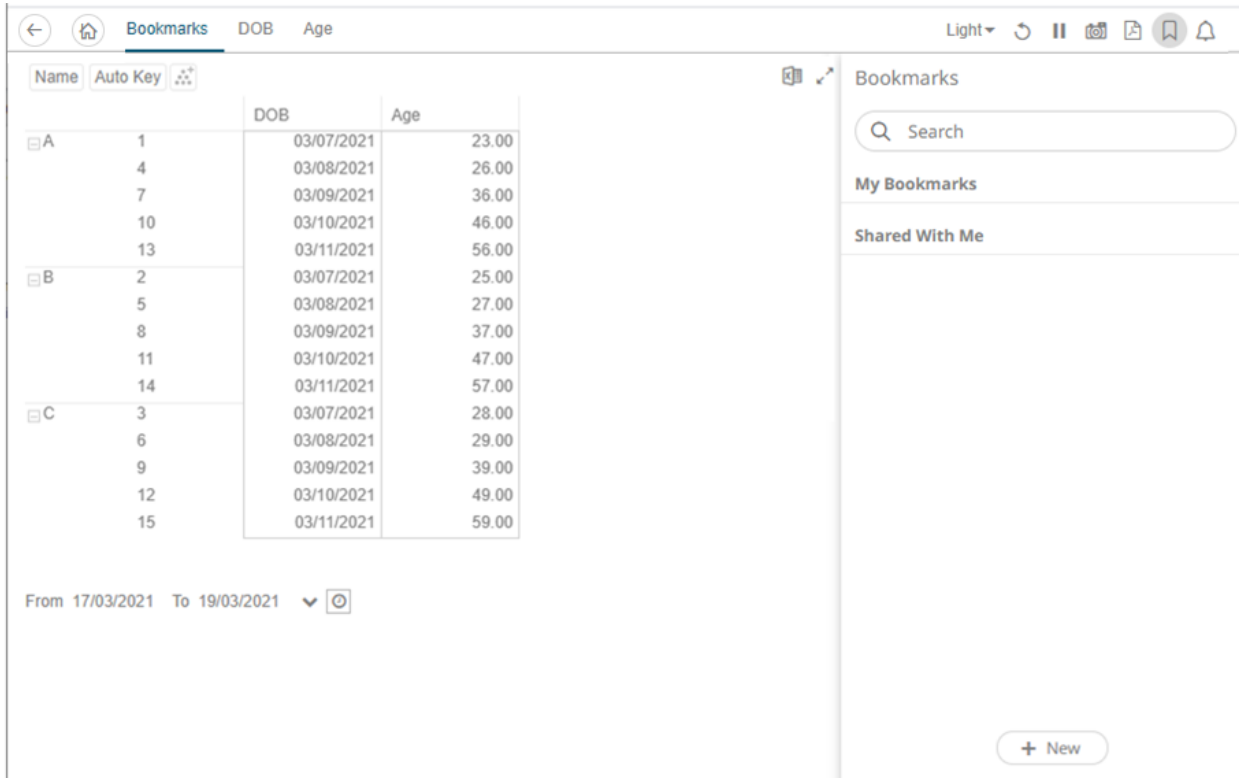
Ad hoc PDF generation in the Web client using Google Chrome (or other browsers) may be hindered by the AdBlock Extension.

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 the 'Bookmarks' interface. The main area displays a table with columns 'Name', 'Auto Key', 'DOB', and 'Age'. The table is grouped by 'Name' (A, B, C) and 'Auto Key' (1, 4, 7, 10, 13 for A; 2, 5, 8, 11, 14 for B; 3, 6, 9, 12, 15 for C). The 'DOB' column shows dates from 03/07/2021 to 03/11/2021, and the 'Age' column shows values from 23.00 to 59.00. Below the table, there is a date range filter: 'From 17/03/2021 To 19/03/2021'. The right sidebar contains a 'Search' bar, 'My Bookmarks' section, and a 'Shared With Me' section. A '+ New' button is located at the bottom right of the sidebar.

| 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 |

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>**.

←

🏠

Bookmarks

DOB

Age

Light▼

↺

⏸

📷

📄

🔖

🔔

Name

Auto Key

⚙️

☐

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

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

▼

🔍

🔖

↗️

Bookmarks

🔍 Search

My Bookmarks


BookMarked - Bookmarks - Bookmark1

↺

✎

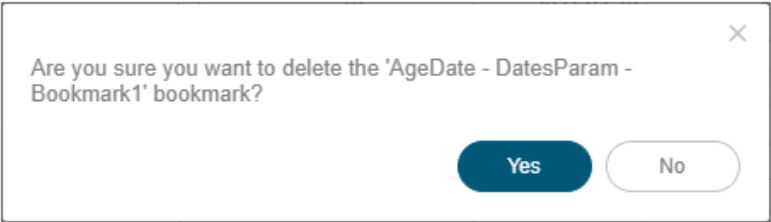

Shared With Me

+ New

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 Yes 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 | <p>Update the bookmark settings.</p>  <p>Click Yes 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 | <p>Available dashboard parameters.</p> <p>NOTES:</p> <ul style="list-style-type: none"> 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 now, 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. Directly modifying the parameter value in the bookmark (such as entering now, today, or yesterday) is not supported. |
| Save | Enabled when a change is made in the bookmark settings. Click to save. |

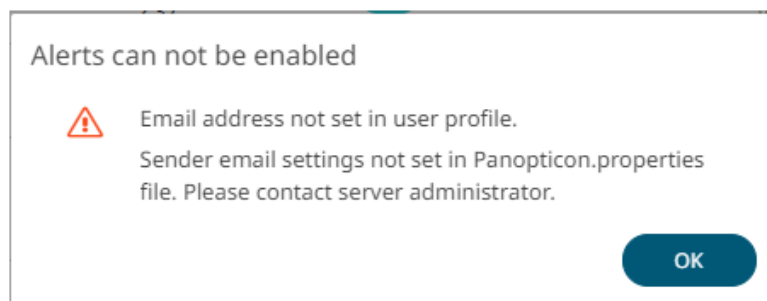
[2] ALERTING

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.

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

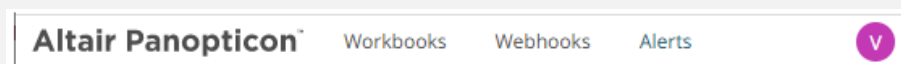
Alert definition can be done by right-clicking on a streaming numeric data in a visualization in the Web client and setting the limits, duration, what will be included, how many and when an email will be sent.

NOTE

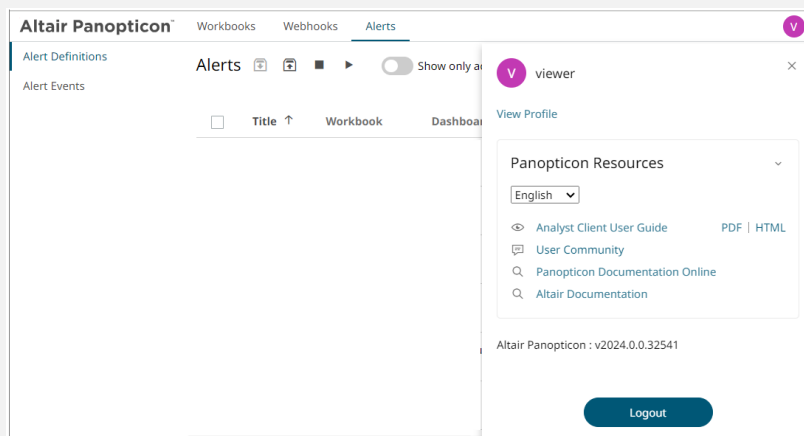
Before setting up the visualization alert, enter the email of the user or group who will receive the alert on the *User Profile*:

Steps:

1. On the toolbar, click .

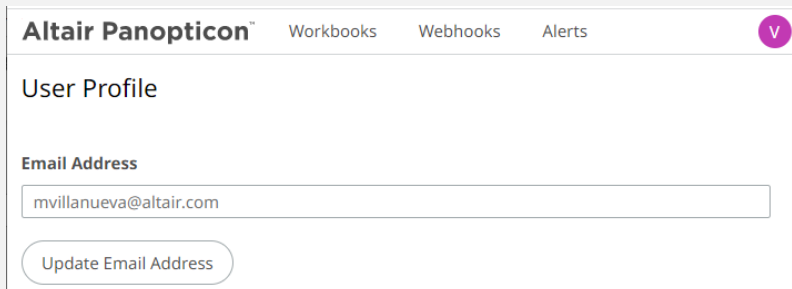


The drop-down menu displays.



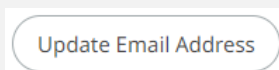
2. Click *View Profile*.

The *User Profile* page displays.



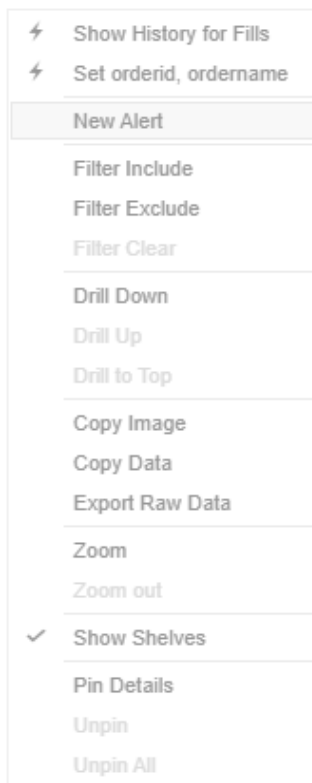
3. Enter the *Email Address*.

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 the name of the visualization where the alert will be set. You can define the alert definition using the four tabs in the dialog: **Criteria**, **Actions**, **Throttling**, and **Details**.

Alert for Dashboard1 > HorizontalTable2 Activated ☐

Alert1

Criteria

Actions

Throttling

Details

Criteria 1 +

Q Search

| Variable | Condition | Limit |
|----------|---------------------|----------------------------|
| Region | TextUnique(Region) | Equals ▼ Asia |
| Country | TextUnique(Country) | Equals ▼ |

OK

Cancel

Sample Text Alerting

Alert for Simple Summary > By Algo Activated ☐

Alert1

Criteria
Actions
Throttling
Details

Criteria 1 +

| Variable | Condition | Limit | |
|----------------|------------------------------|--------|--------------------------|
| usdfilledvalue | Sum(usdfilledvalue) | <= | |
| pcntfilled | WeightedMean(pcntfilled,u... | <= | |
| algotype | TextUnique(algotype) | Equals | Cost Driven |
| algoname | TextUnique(algoname) | Equals | Implementation Shortfall |

OK

Cancel

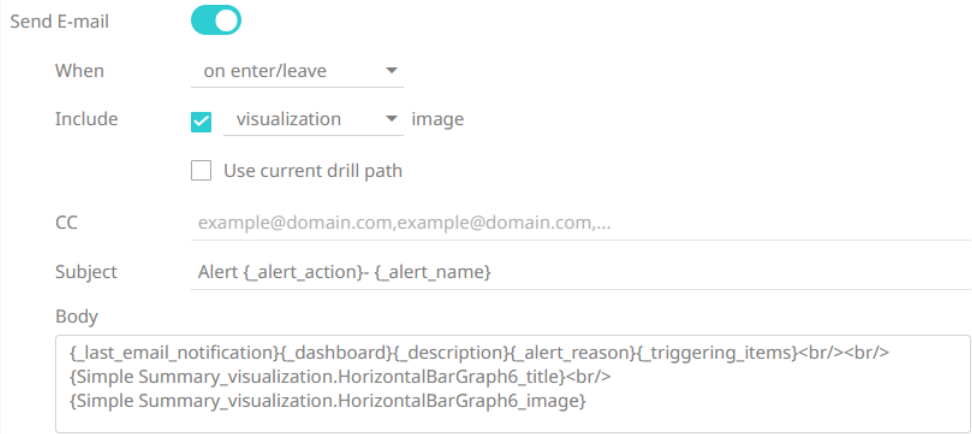
Sample Numeric Alerting

- The alert name is editable (i.e., **Alert1**). Double-click and enter a descriptive alert name.
- On the **Criteria** tab, you can enter or perform the following:





| Property | Description |
|-----------|---|
| Search | Search for columns. |
| Criteria | <p>Criteria set of the alert. Can be multiple, in which case all criteria sets are evaluated in parallel, each triggering respective alerts.</p> <p>Additional criteria sets can be added by clicking +. You can also right-click a Criteria tab and select Rename to rename the criteria or select Remove to delete. The Remove option is disabled when only one criteria set is available.</p> |
| Variable | Available variable columns in the visualization where the alert is set. |
| Condition | <p>Allows setting the following Limit of all the available numeric variables in the visualization:</p> <ul style="list-style-type: none"> Upper or Equal To (<=) Lower or Equal To (>=) Upper values (<) Lower values (>) Between – values between the Lower and Upper values <p>For text variables, there are four types of conditions:</p> <ul style="list-style-type: none"> Equals - The string is equal to another string, e.g., Country=Sweden Not Equals – The string is not equal to another string Wildcard: The string matches a wildcard expression, e.g., Country=Norwa* would match Country=Norway |

| | |
|--|---|
| | <ul style="list-style-type: none"> Regex: The string matches a regex expression, e.g., Country= [a-zA-Z]+a would match Country=India and Country=Indonesia |
|--|---|

4. On the **Actions** tab, you can specify the following:

| Property | Description |
|--------------|---|
| Send E-mail | <p>Tap the slider to update the dialog and display the following settings:</p>  <ul style="list-style-type: none"> When Determines when an alert email will be sent: <ul style="list-style-type: none"> On enter On leave On enter/leave If unchecked, the notification will only be displayed on the Web client. Include Determines whether the image of the visualization or dashboard will be included in the alert email. For the included image of the visualization, check the Use current drill path box to generate a drilled image in the email. CC CC mailing groups that will receive the alert, separated by a comma. Subject The subject of the alert's email notifications. Body The content of the alert's email notifications. |
| Call Webhook | Tap the slider and select the one or more webhooks that will be executed when the alert is triggered. |
| Play Sound | Tap the slider and select the sound that will be played for a triggered alert. The available sounds are mp3 files placed in the <code>AppData/Sounds</code> folder. Panopticon is shipped with one sound (i.e., bell_ping_1s.mps). Default is None . |


5. On the **Throttling** tab, you can specify the following:

| Property | Description |
|--------------|--|
| For the Last | Checks if a value has reached the limit on the set Date/Time unit: <ul style="list-style-type: none">• second(s)• minute(s)• hour(s)• day(s) |
| Action Limit | The maximum number of times an alert will be sent on the set Date/Time unit: <ul style="list-style-type: none">• second(s)• minute(s)• hour(s)• day(s) |
| Active Hours | <p>Tap the slider to update the dialog and display the following settings:</p> <div><p>Active Hours <input checked="" type="checkbox"/></p><p>From 09:00 am </p><p>To 05:00 pm </p><p>Timezone </p><p>Days Mon, Tue, Wed, Thu, Fri </p></div> <p>Determines when an alert should be active. Set the <i>From</i> and <i>To</i> time limits, <i>Timezone</i>, and <i>Days</i>.</p> <p>NOTE: Once you set the <i>Timezone</i>, the <i>From</i> and <i>To</i> limits will be applied for that time zone. If not set, the server's default time zone will be used.</p> |

6. On the **Details** tab, you can view or specify the following:

| Property | Description |
|-------------|--|
| Breakdown | Current breakdown of the visualization. |
| Description | Description of the alert. |
| Parameters | Available parameters in the visualization. |

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

8. Click . The new alert is added to the *Alerts* page.

NOTE

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

See [Working with Alerts](#) for more information.

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

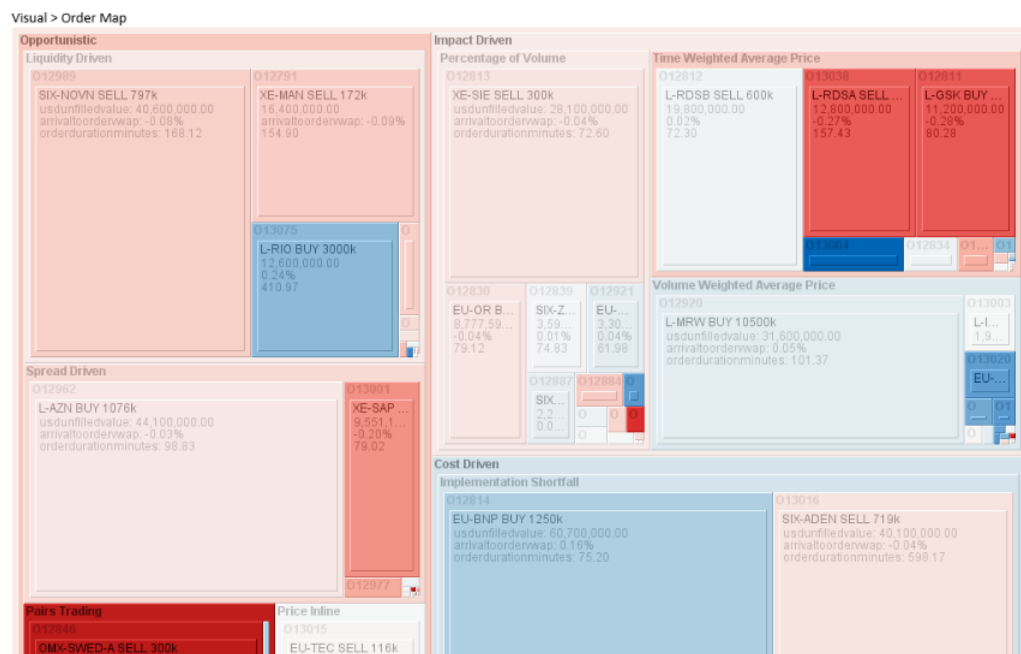
All items that do not match the criteria are excluded from the display.

Dashboard: http://localhost:8080/panopticon/workbook/#/ecs_kx/Visual

Condition: Sum(fills) >= 10.0

The alert was triggered by the following items:

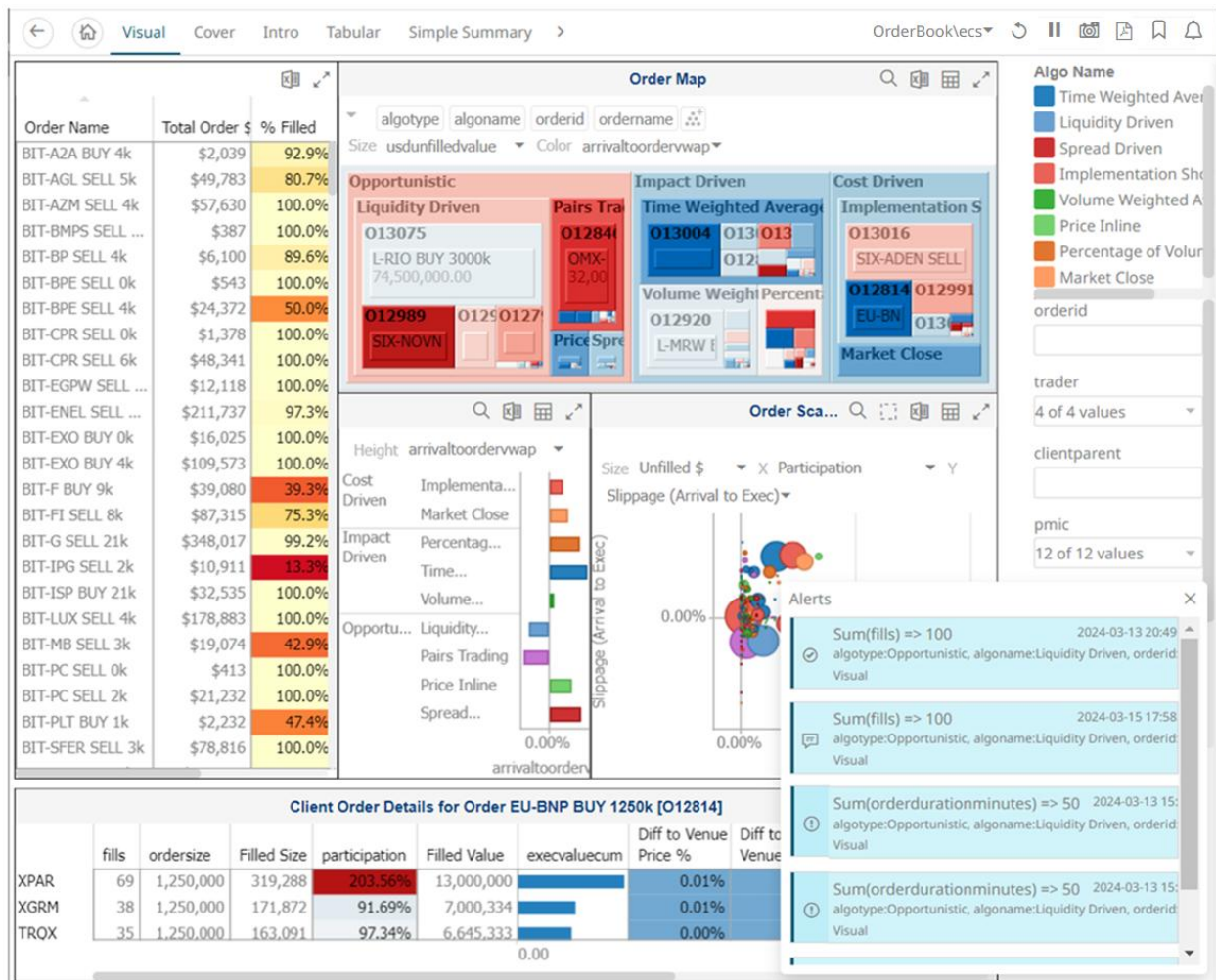
algotype:Opportunistic, algoname:Liquidity Driven, sym:O12989, ordername:SIX-NOVN SELL 797k



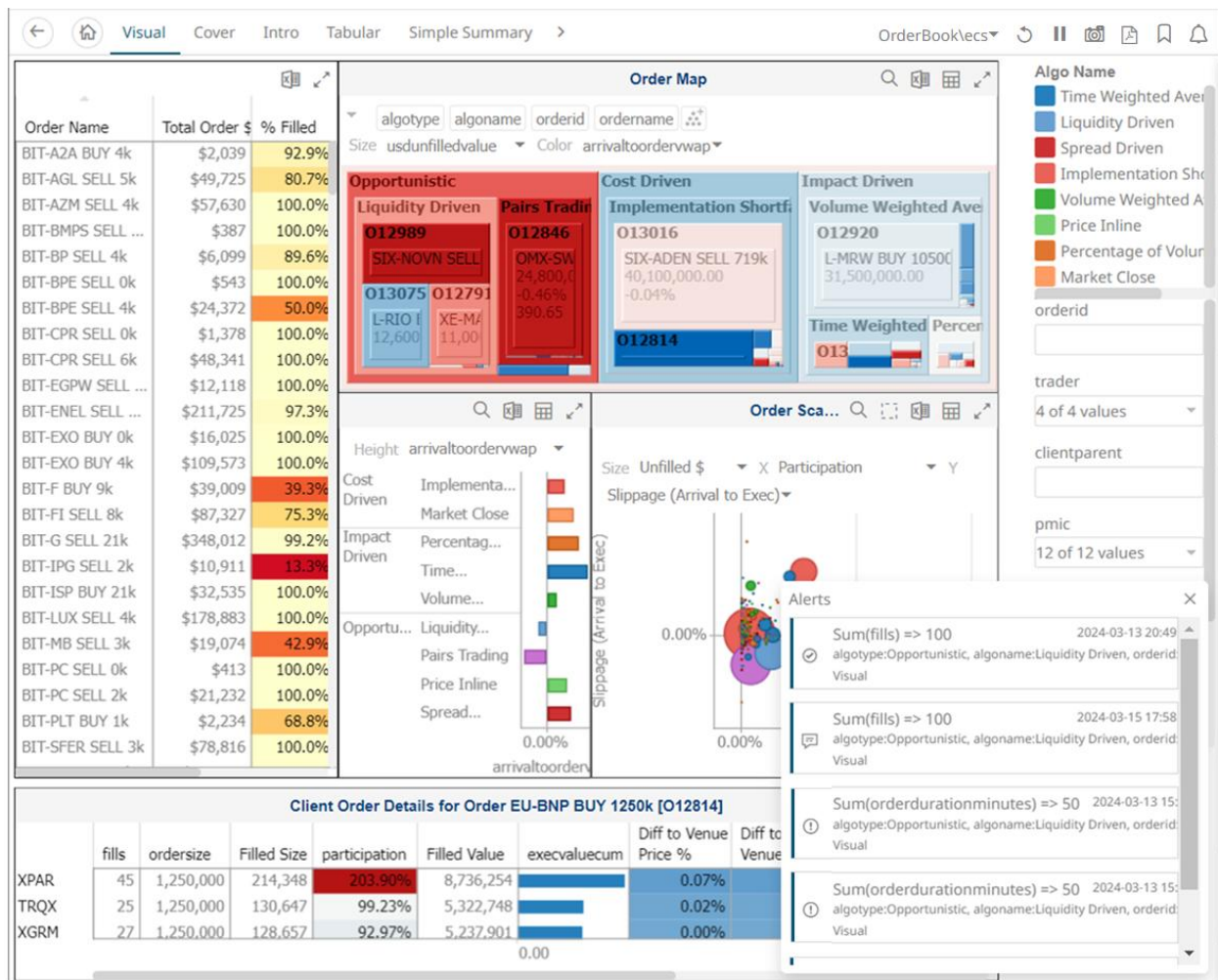
Sample Web Client Alerts


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, alerts initially display highlighted in blue:




The blue highlight eventually fades away.



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

You can open an alert either by:

- ☐ Clicking the **Alert**  icon
- ☐ Clicking an alert on the pop-up

Order Map

| Order Name | Total Order \$ | % Filled |
|-------------------|----------------|----------|
| BIT-A2A BUY 4k | \$2,038 | 92.9% |
| BIT-AGL SELL 5k | \$49,725 | 80.7% |
| BIT-AZM SELL 4k | \$57,630 | 100.0% |
| BIT-BP SELL 4k | \$6,095 | 89.6% |
| BIT-BPE SELL 0k | \$543 | 100.0% |
| BIT-CPR SELL 0k | \$1,378 | 100.0% |
| BIT-EGPW SELL ... | \$12,118 | 100.0% |
| BIT-ENEL SELL ... | \$211,688 | 97.3% |
| BIT-EXO BUY 0k | \$16,025 | 100.0% |
| BIT-EXO BUY 4k | \$109,573 | 100.0% |
| BIT-F BUY 9k | \$38,923 | 39.3% |
| BIT-FI SELL 8k | \$87,327 | 75.3% |
| BIT-G SELL 21k | \$348,005 | 99.2% |
| BIT-ISP BUY 21k | \$32,535 | 100.0% |
| BIT-LUX SELL 4k | \$178,883 | 100.0% |
| BIT-PC SELL 0k | \$413 | 100.0% |
| BIT-PLT BUY 1k | \$2,231 | 27.7% |
| BIT-SFER SELL 3k | \$78,816 | 100.0% |
| BIT-SPM BUY 6k | \$497,480 | 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 | 84 | 1,250,000 | 414,332 | 217.81% | 16,900,000 | | 0.02% | 0.04% |

Alerts

Search alerts: All Open

Sum(fills) => 100
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-15 17:58:07
 Comment Resolve
 Comment 'This alert is acknowledged.' by design...

Sum(orderdurationminutes) => 50
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-13 15:24:22
 Comment Resolve
 Triggered on 2024-03-13 15:24:22

Sum(orderdurationminutes) => 50
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-13 15:08:02
 Comment Resolve
 Triggered on 2024-03-13 15:08:02

Sum(orderdurationminutes) => 50
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-13 14:55:32
 Comment Resolve
 Triggered on 2024-03-13 14:55:32

Clicking on a notification highlights the item in the workbook that triggered the alert.

Order Map

| Order Name | Total Order \$ | % Filled |
|-------------------|----------------|----------|
| BIT-A2A BUY 4k | \$2,039 | 92.9% |
| BIT-AGL SELL 5k | \$49,757 | 80.7% |
| BIT-AZM SELL 4k | \$57,630 | 100.0% |
| BIT-BP SELL 4k | \$6,099 | 89.6% |
| BIT-BPE SELL 0k | \$543 | 100.0% |
| 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 ... | \$211,712 | 97.3% |
| BIT-EXO BUY 0k | \$16,025 | 100.0% |
| BIT-EXO BUY 4k | \$109,573 | 100.0% |
| BIT-F BUY 9k | \$39,009 | 39.3% |
| BIT-FI SELL 8k | \$87,340 | 75.3% |
| BIT-G SELL 21k | \$348,012 | 99.2% |
| BIT-ISP BUY 21k | \$32,535 | 100.0% |
| BIT-LUX SELL 4k | \$178,883 | 100.0% |
| BIT-PC SELL 0k | \$413 | 100.0% |
| BIT-PLT BUY 1k | \$2,231 | 47.4% |
| BIT-SFER SELL 3k | \$78,816 | 100.0% |
| BIT-SPM BUY 6k | \$497,480 | 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 | 84 | 1,250,000 | 414,332 | 217.81% | 16,900,000 | | 0.02% | 0.04% |

Alerts

Search alerts: All Open

Sum(fills) => 100
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-15 17:58:07
 Comment Resolve
 Comment 'This alert is acknowledged.' by design...

Sum(orderdurationminutes) => 50
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-13 15:24:22
 Comment Resolve
 Triggered on 2024-03-13 15:24:22

Sum(orderdurationminutes) => 50
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-13 15:08:02
 Comment Resolve
 Triggered on 2024-03-13 15:08:02

Sum(orderdurationminutes) => 50
 algotype: Opportunistic, algoname: Liquidity Driv...
 Visual 2024-03-13 14:55:32
 Comment Resolve
 Triggered on 2024-03-13 14:55:32

[3] WEBHOOKS

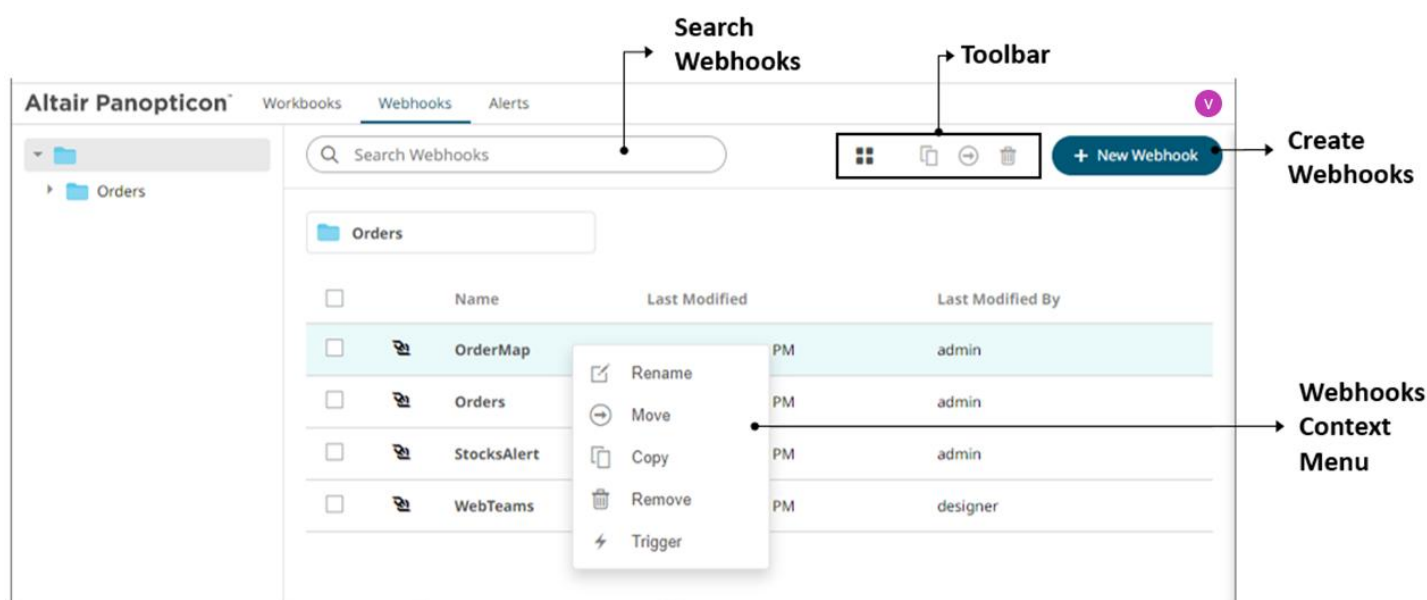
A webhook is a special URL that makes it possible to send a message from other systems into the system that issued the webhook. Webhook URLs should be treated with care and not shared publicly, since anyone with knowledge about the webhook URL will be able to use it.

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, like 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.

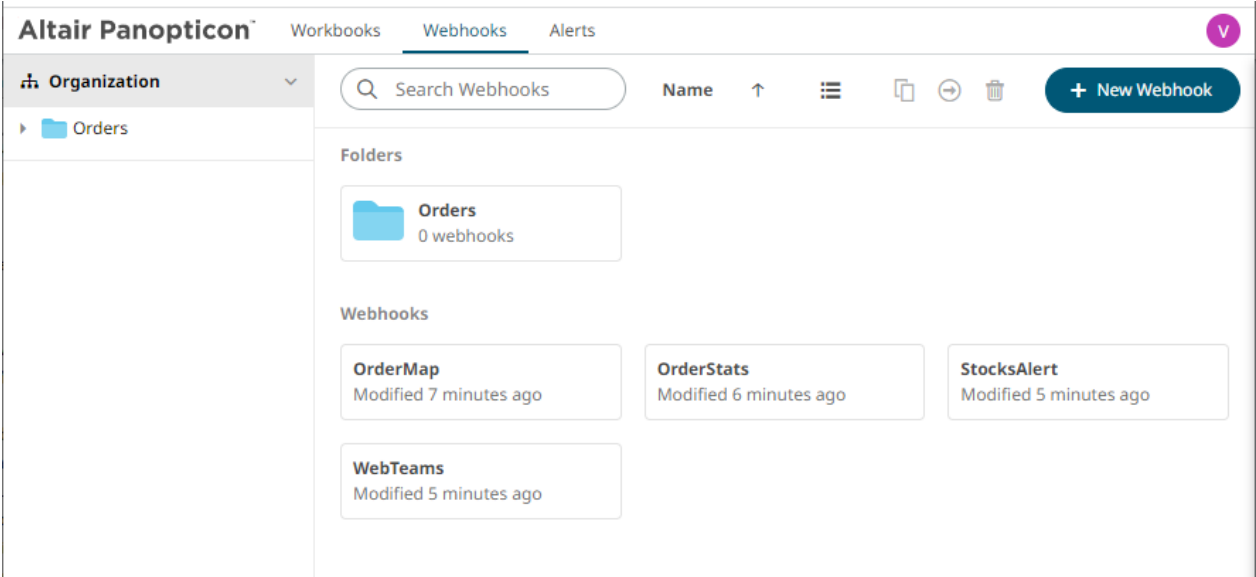



| Property | Description |
|---------------------------------------|--|
| Search Webhooks | Entering text will filter the webhooks. |
| Toolbar | Allows copying, moving, and removing of webhooks. Also, to display the webhooks list either on List View or Grid View . |
| Create Webhooks | Allows creating new webhooks. |
| Webhooks Context Menu | Allows renaming , moving , copying , deleting , and enabling of the trigger of webhooks. |

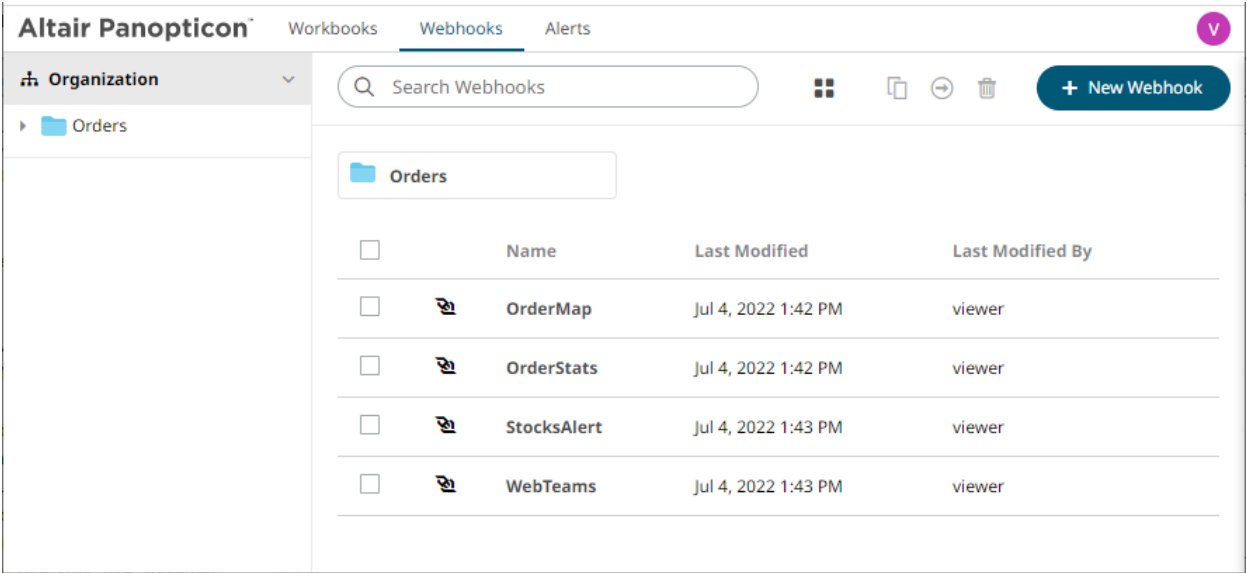
Folders and Webhooks Display View

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.



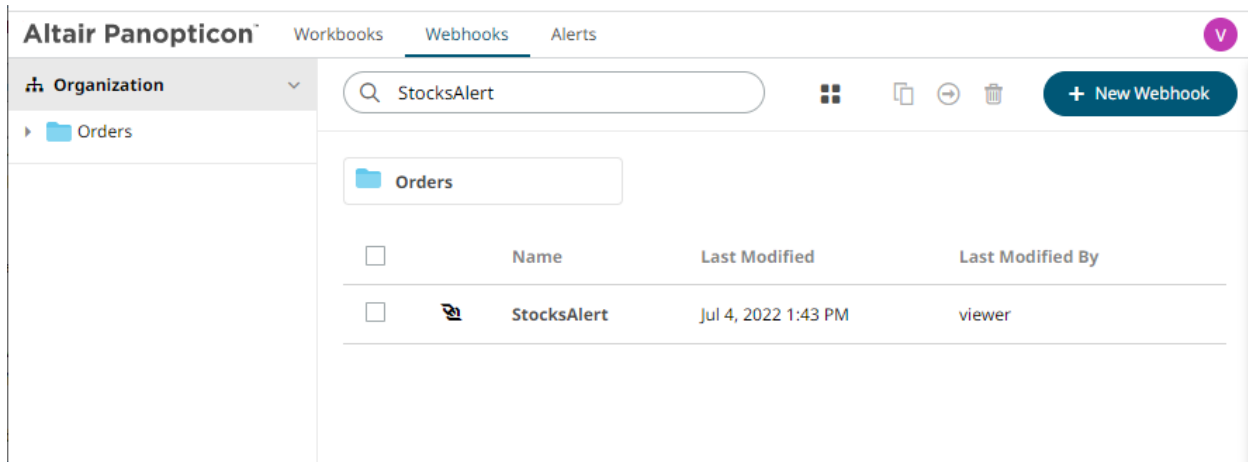
Or click **List View** , the folders and webhooks are displayed in a standard listing.



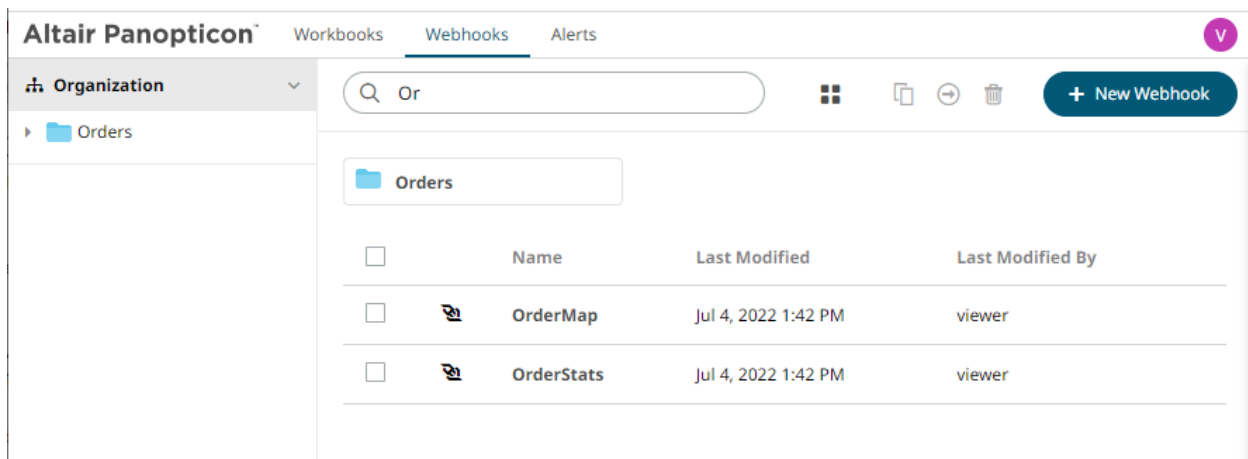
On either display view style, clicking on a webhooks title or thumbnail displays the *Webhooks* page.

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 dark blue button with a white plus sign and the text 'New Webhook'.

New Webhook

Webhook1

Create

Cancel

2. Enter the name of the webhook then click .

The new webhook is displayed on the *Webhook* page.

Altair Panopticon™

Workbooks

Webhooks

Alerts

V

← OrderType

⚡ Trigger

💾 Save

Description

Url*

Headers

Http Method

POST

▼

Timeout

10000

Content Type




application/json

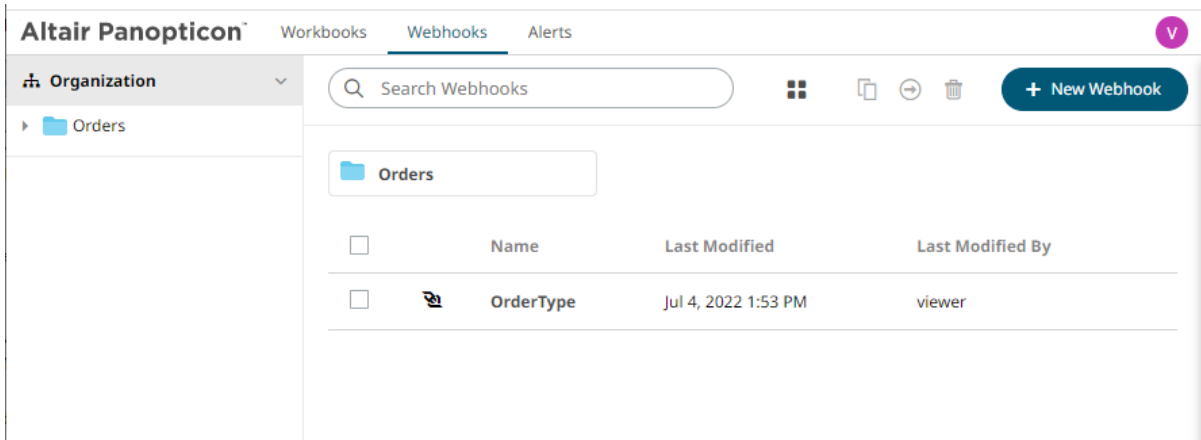
Request Body

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> <div>GET</div> <div> <div>GET</div> <div>POST</div> <div>PUT</div> <div>DELETE</div> </div> </div> <ul style="list-style-type: none"> • GET – To retrieve data. • POST – To add new data. • PUT – To replace existing data. • DELETE – To remove existing data. |
| Timeout | Timeout (in ms) for reading a response from the URL. |
| Content Type | The content type of the request body. Default is application/json . |
| 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> |

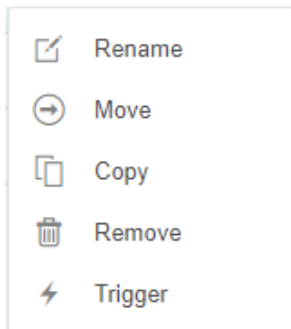
- Click  to save the new webhook.
- Click  to trigger the webhook. Any parameter in the request body will be replaced by its value when triggering the webhook request.
For example:
`{_current_time}` - 2021-07-01T12:34:56Z
- Click  to go back to the *Folders and Webhooks* list. The new webhook is added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



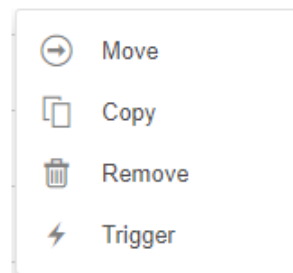
WEBHOOKS TOOLBAR AND CONTEXT MENU

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

| | |
|------------------------|------------------|
| Remove | Remove webhooks. |
|------------------------|------------------|

The *Context Menu* options include:

| Context Menu Option | Description |
|-------------------------|---|
| Rename | Rename the webhook. |
| Move | Move webhooks to another folder or subfolder where the user has permission. |
| Copy | Copy webhooks to another folder or subfolder where the user has permission. |
| Remove | Remove webhooks. |
| Trigger | Trigger the webhook. |

Sorting Webhooks

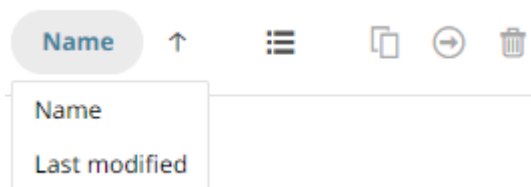
Sorting webhooks can be done by **Name**, **Last Modified**, or **Last Modified By**.

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**.

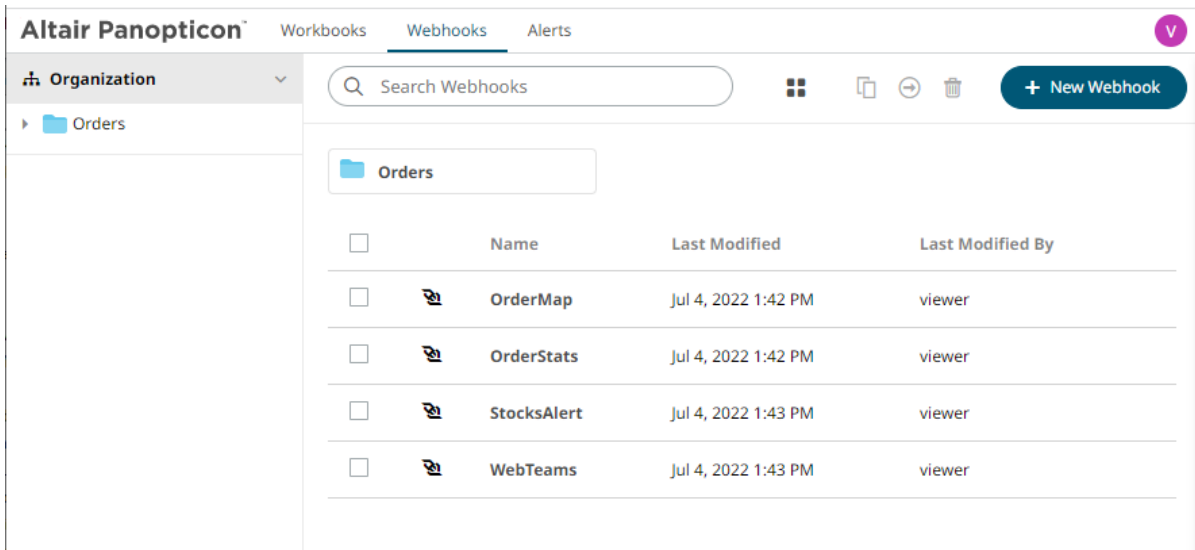


- Name
- Last Modified

Then click the *Sort Order*:

- Ascending
- Descending

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



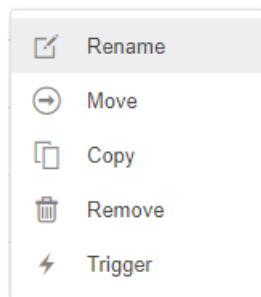
Then click the *Sort Order*:

- Ascending
- Descending

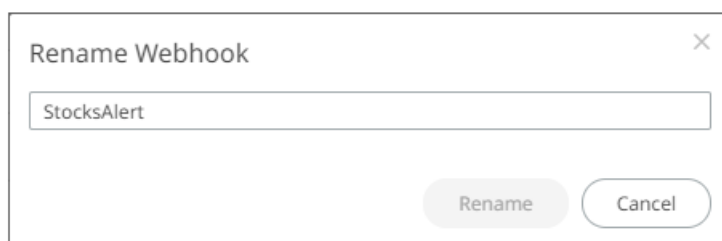
Renaming a Webhook

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  .

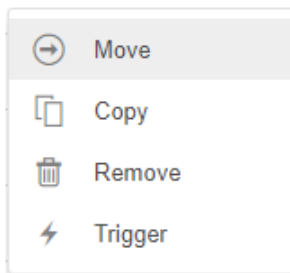
Moving Webhooks

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

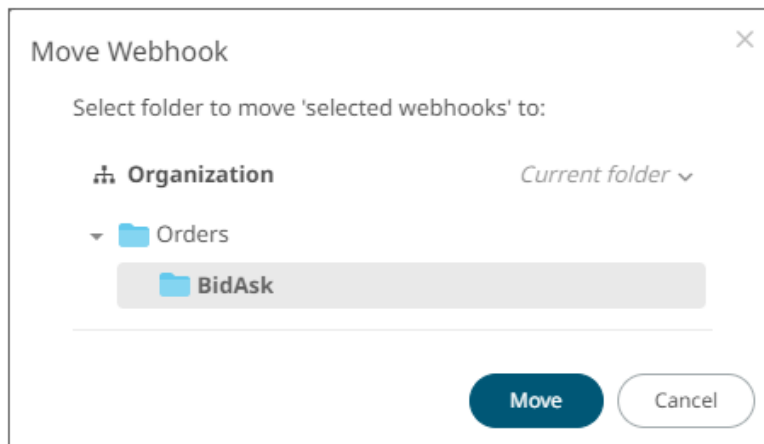
Steps:

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

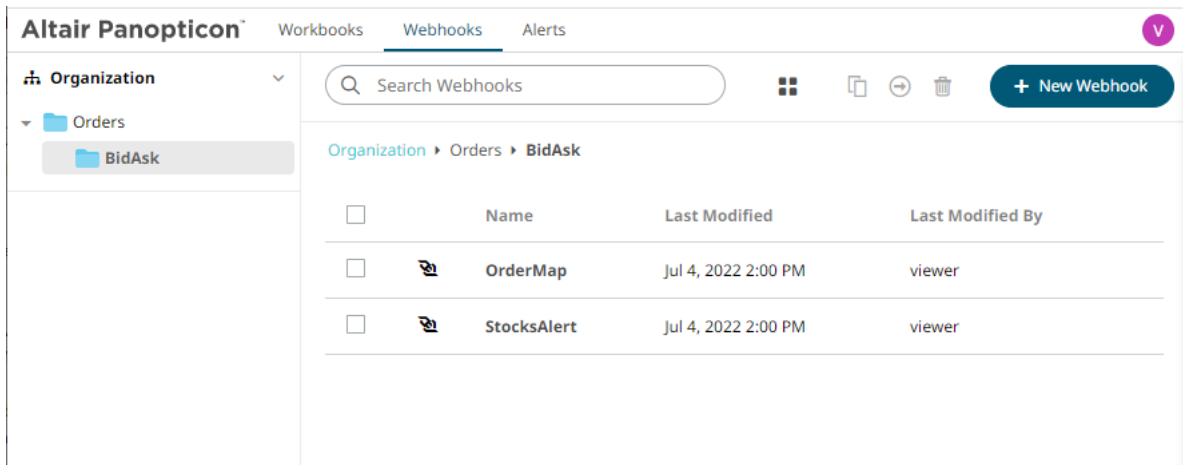


The *Move Webhook* dialog displays with the folder or subfolders that the user is allowed to move the webhooks. Select the folder or subfolder.



3. Click .

The webhooks are moved and displayed on the selected folder.



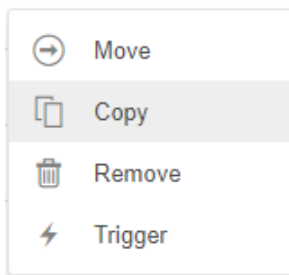
Copying Webhooks

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

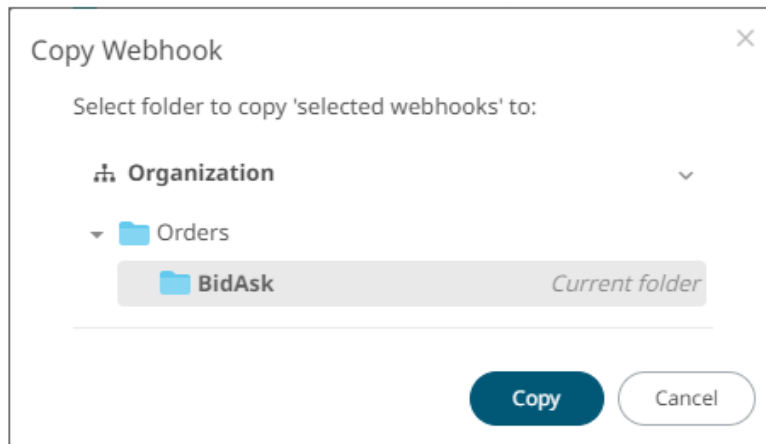
Steps:

1. Check the box of one or several webhooks either on *Grid View* or *List View*.
2. Then select either:

- the **Copy** icon on the toolbar
- **Copy** on the content menu

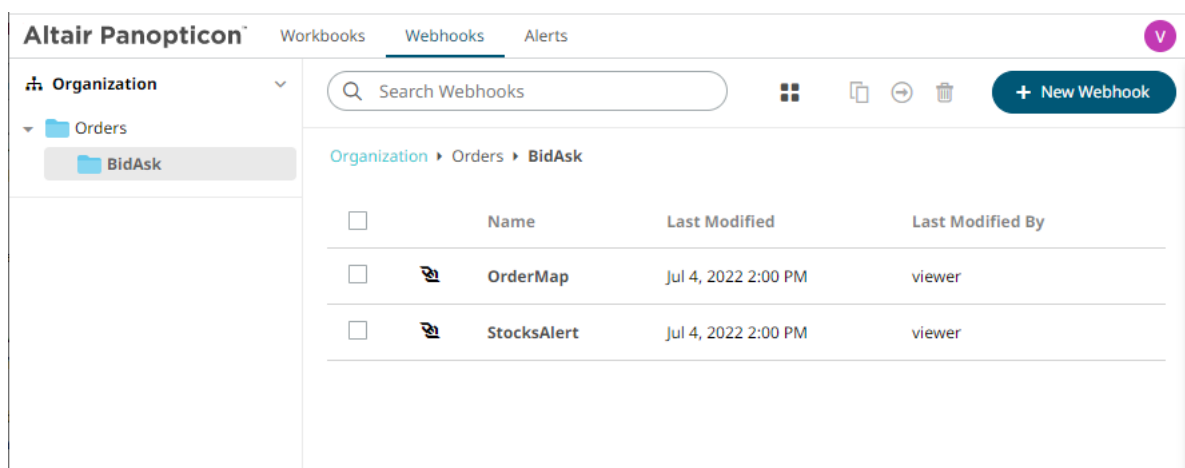


The *Copy Webhook* dialog displays with the folder or subfolders the user is allowed to copy the webhooks to. Select the folder or subfolder.



3. Click .


The webhooks are copied and displayed on the selected folder.

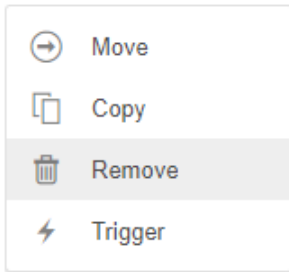


Deleting Webhooks

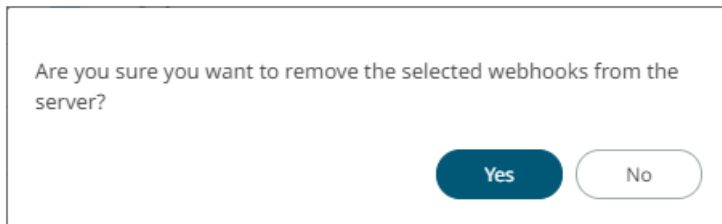
Users with a Viewer role can remove webhooks.

Steps:

1. Check the box of one or several webhooks either on *Grid View* or *List View*.
2. Then select either:
 - the **Remove**  icon on the toolbar
 - **Remove** on the content menu



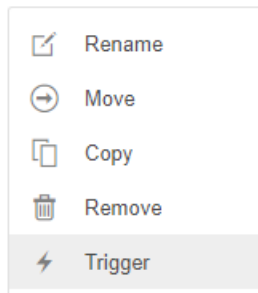
A notification message displays.



3. Click  to remove.

Triggering Webhooks

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




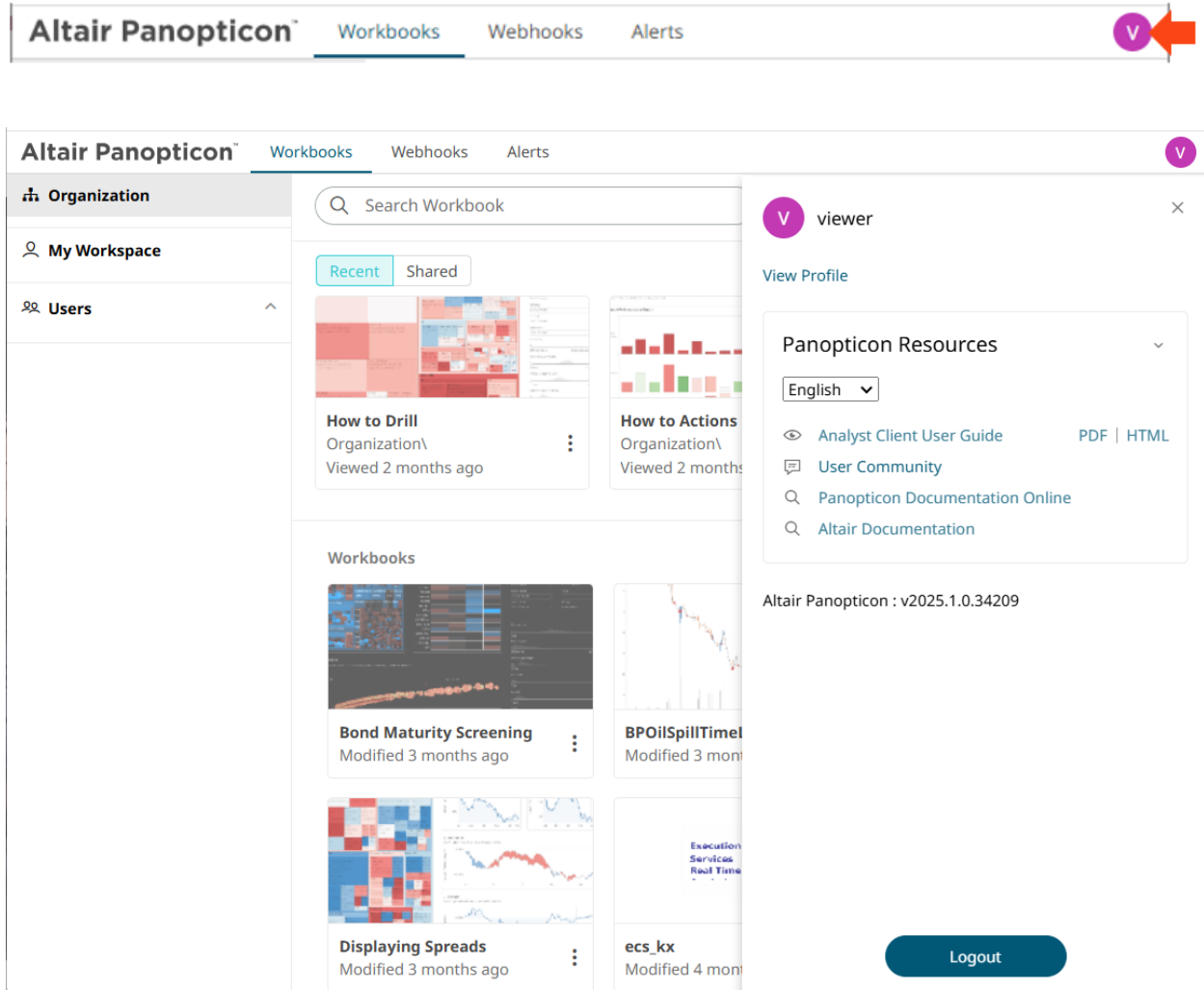
Any parameter in the request body will be replaced by its value when triggering the webhook request.

For example:

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

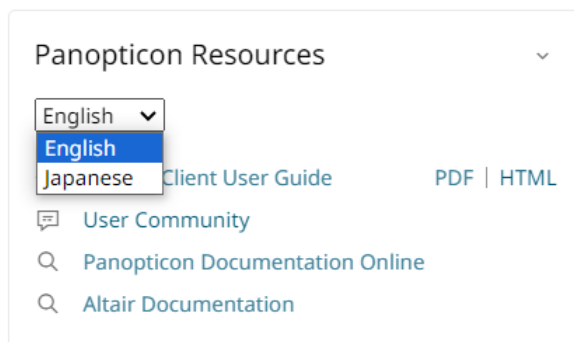
[4] PANOPTICON RESOURCES

Clicking  on the top right section of the toolbar displays the other Panopticon online resources that users with a Viewer role can access.



The screenshot shows the Altair Panopticon interface. At the top, there is a toolbar with the 'Altair Panopticon' logo and tabs for 'Workbooks', 'Webhooks', and 'Alerts'. A purple circle with a white 'V' icon is located in the top right corner of the toolbar, with a red arrow pointing to it. Below the toolbar, the main content area is divided into three sections: 'Organization', 'My Workspace', and 'Users'. The 'Organization' section is currently selected. The 'My Workspace' section shows a search bar and two tabs: 'Recent' and 'Shared'. The 'Recent' tab is active, displaying a list of workbooks. The 'Users' section shows a list of users. The 'Panopticon Resources' dropdown menu is open, showing a list of resources: 'Analyst Client User Guide' (PDF | HTML), 'User Community', 'Panopticon Documentation Online', and 'Altair Documentation'. The language is set to 'English'.

Select the *Language* on the drop-down list: **English** or **Japanese**.



This is a close-up of the 'Panopticon Resources' dropdown menu. The menu is open, showing a list of resources: 'Analyst Client User Guide' (PDF | HTML), 'User Community', 'Panopticon Documentation Online', and 'Altair Documentation'. The language is set to 'English'.

| Resource | Description |
|------------------------------|--|
| Analyst Client User Guide | <p>Panopticon Real Time documentation for users with a Viewer role which consists of:</p> <ul style="list-style-type: none"> • Viewing and analyzing of workbooks • Creating, monitoring, and deleting of alerts <p>Available upon installation.</p> |
| User Community | Link to the Panopticon User Community page. |
| Data Analytics Documentation | Link to the Altair Data Analytics Documentation page. |
| Altair Documentation | Link to product documentation in the Altair Community page. |

03.2025

ABOUT PANOPTICON

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