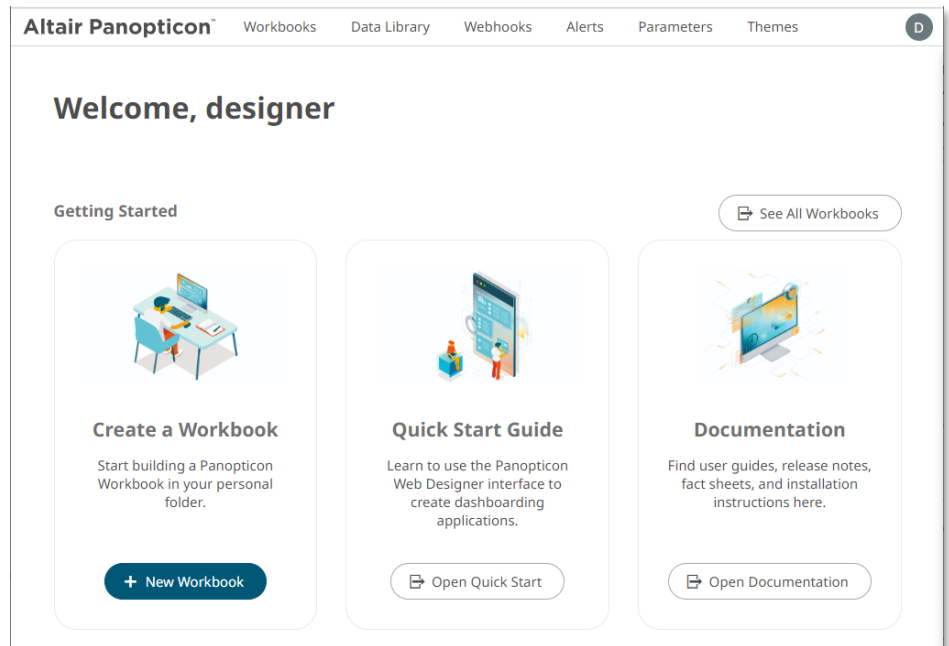


LAUNCH ALTAIR PANOPTICON REAL TIME

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

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

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



FROM DATA TO DASHBOARD IN 3 QUICK STEPS

1 CREATE A WORKBOOK

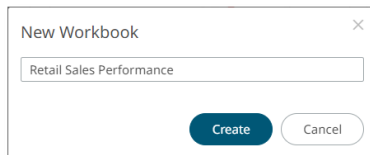
On the **Workbooks** tab, select **My Workspace** folder then click

+ New Workbook

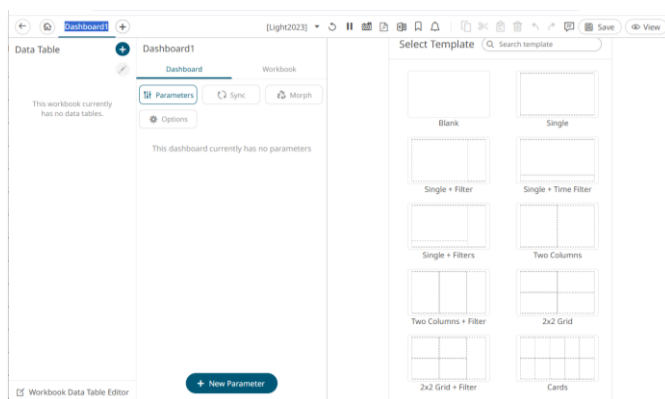
Enter the workbook name

and click

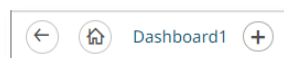
Create



This opens the *Open Workbook in Design Mode*.



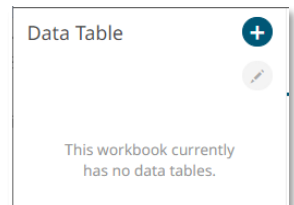
The dashboard name by default is editable. Enter a descriptive name.



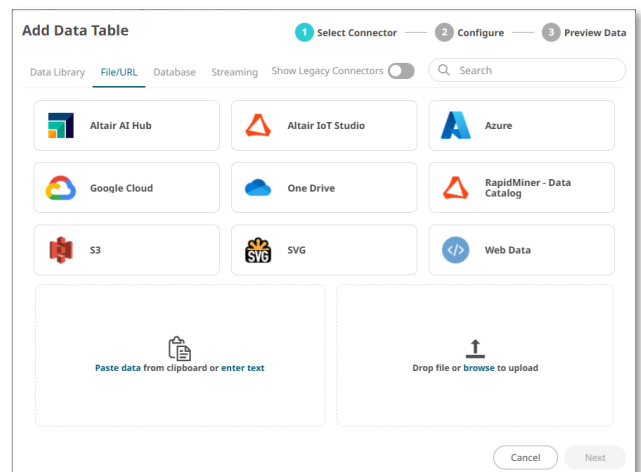
2 CONNECT TO DATA

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

Click **+** on the *Data Table* panel.



The *Add Data Table* wizard displays.



EXAMPLE: MS EXCEL DATA SOURCE

Using the wizard:

1 Select Connector

Select **File/URL** tab then click **MS Excel**.

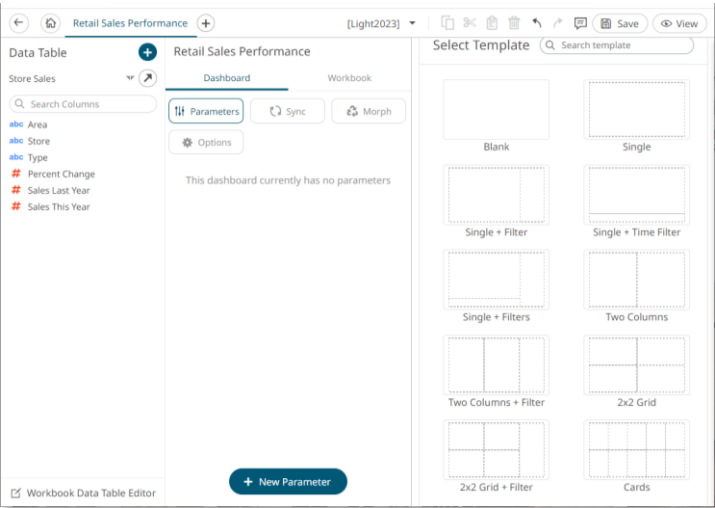
2 Configure

- 1. Click **Upload File** to browse an MS Excel file and select it.
- 2. Select a sheet.
- 3. Define initial settings then click **Next**.

3 Preview Data

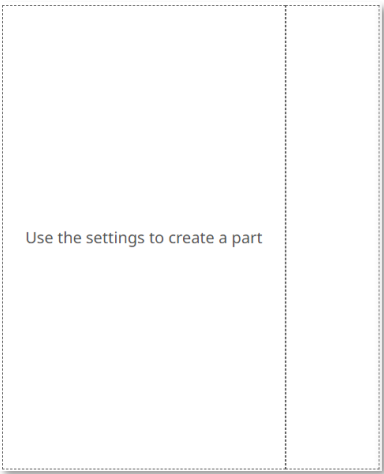
- 1. Inspect the preview of the data then click **Data Library** to save it to the Data Library.
- 2. Click **OK**.

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



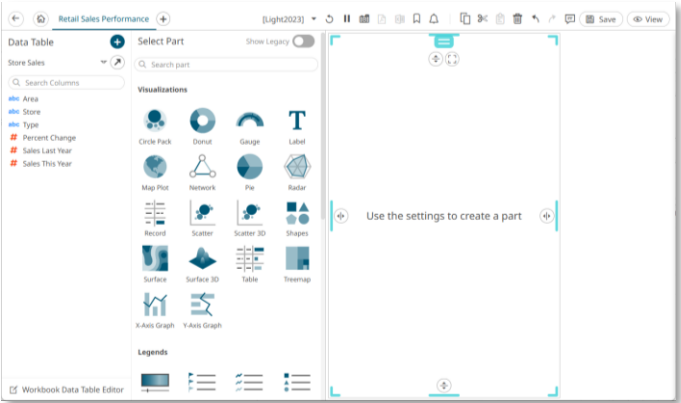
3 BUILD A VISUALIZATION

- 1. On the dashboard canvas, click **Single + Filter** template.
The skeleton image of each part is displayed on the dashboard.



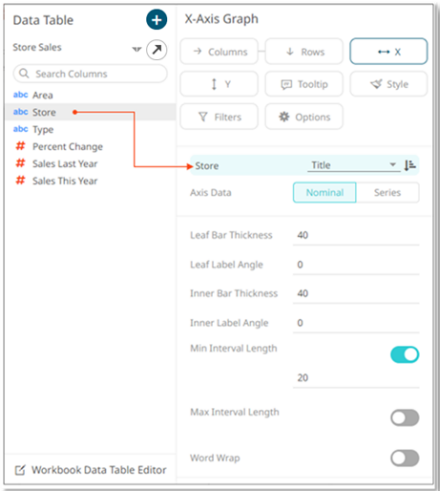
- 2. Select the left part to add and configure a visualization.

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

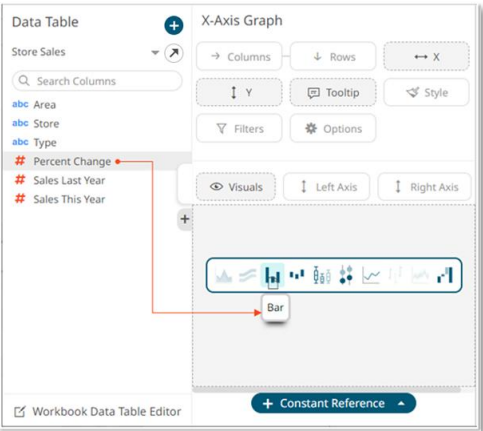


- 3. Select **X-Axis Graph**.
- 4. Drag columns from the *Data Table* pane to the *X-Graph Settings* pane to define the hierarchical breakdown and visualization variables (e.g., Columns, Rows, X, Y).

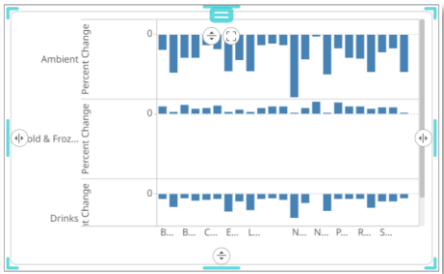
For the X-Axis variable, select and drag and drop a column on the X pill.



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

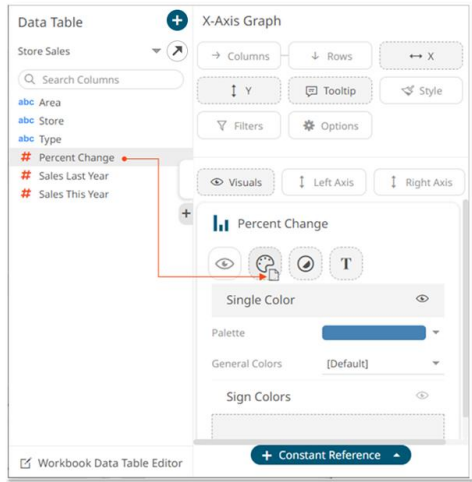


The X-Axis Graph displays on the dashboard.



3.1 ENHANCE YOUR VISUALIZATION

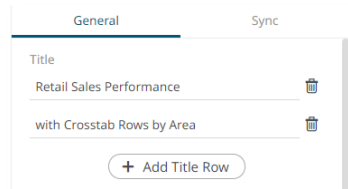
1. Drag a column to the **Color** pill of the **Bar** graph.



The color variable is applied to the visualization.



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



3.2 ADD COLOR LEGEND

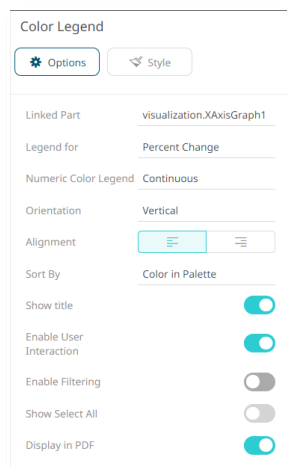
1. Draw another rectangle on the dashboard canvas and click the **Color Legend** icon.



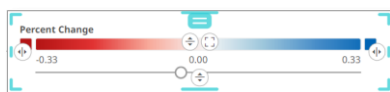
You will see a skeleton image of the legend.



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

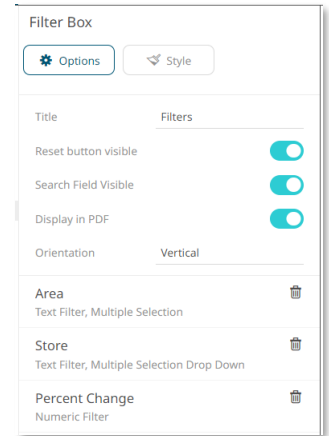


The color legend displays.



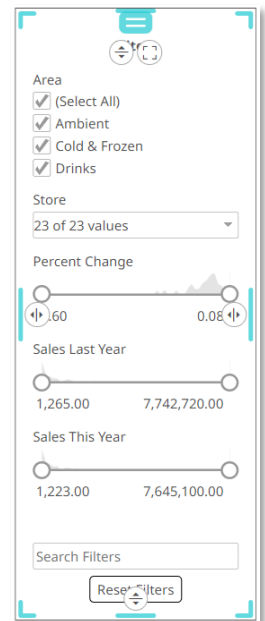
3.3 ADD FILTERS

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

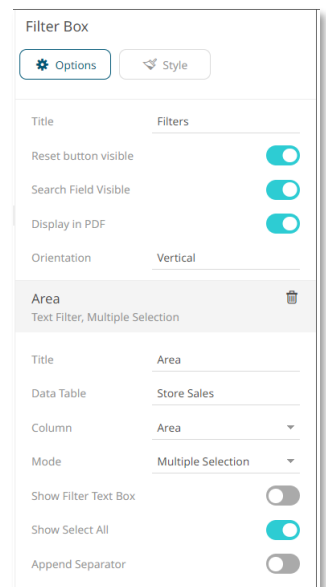


2. On the **Filter Box Settings** pane, enter the **Title** and define the other settings. Then drag and drop text columns from the **Data Table** pane.

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



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



3.4 SAVE YOUR WORKBOOK

Click the **Save** icon on the toolbar. Once saved, the **Saved!** notification is displayed.

To display the workbook in *View Mode*, click **View**.

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



LEARN MORE

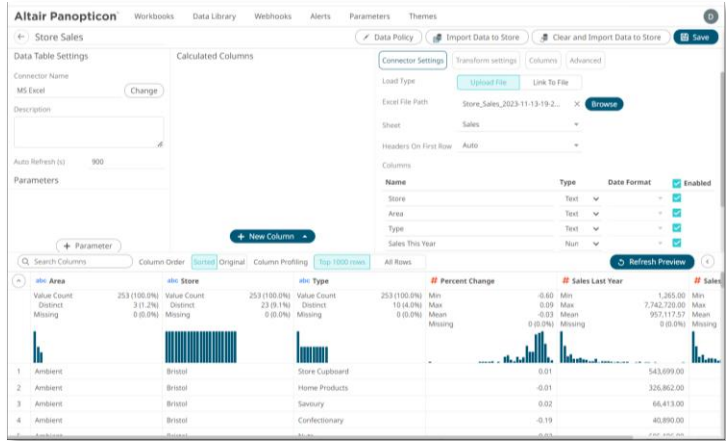
DATA LIBRARY

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

Altair Panopticon™						
Workbooks		Data Library	Webhooks	Alerts	Parameters	Themes
Organization		Search Data Table				
My Workspace		All				
MarketCap		+ New Legacy Extract + New Joined Data Table + New Data Table				
		Name ↑	Connector	Type	Last Modified	Last Modified By
		BitCoinOrders	Text	Live	Nov 14, 2023 3:49 PM	designer
		StocksStatic	JDBC	Live	Nov 14, 2023 3:53 PM	designer
		Store Geography	MS Excel	Uploaded	Nov 14, 2023 3:50 PM	designer
		Store Sales	MS Excel	Uploaded	Apr 5, 2024 6:22 PM	designer

REFINE YOUR DATA TABLE BY ADDING CALCULATED COLUMNS

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



2. On the *Calculated Columns* pane, click **Calculated**.

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

Calculated Columns

Calculated

Sales Delta

TitleSales Delta

Set type manually☐ Numeric

Format###0

Expression

fx Editor...

[Sales This Year]-[Sales Last Year]

4. Click **Save**. The new calculated column is added and displayed in the *Data Preview* pane.

JOIN DATA TABLES

1. Click + New Joined Data Table on the *Data Library* page.
2. Enter the name and click Create.

New Data Table

RetailPerformanceJoin

CreateCancel

The *Join Data Table Editor* is displayed.

Altair Panopticon

WorkbooksData LibraryWebhooksAlertsParametersThemes

+ RetailPerformanceJoin

Data PolicyImport Data to StoreClear and Import Data to Store

Data Table Settings

Calculated Columns

Join SettingsTransform settingsAdvanced

Description

Auto Refresh (s)900

Parameters

+ Parameter

+ New Column

+ Add Data Table

Search Columns

Column Order

SortedOriginal

Column Profiling

Top 1000 rows

All Rows

Refresh Preview

Preview Not Available

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

Add Data Table

Search Data Table

Root > Organization

	Name ↑	Connector	Type	Last Modified	Last Modified By
	BitCoinOrders	Text	Live	Nov 14, 2023 3:49 PM	designer
	StocksStatic	JDBC	Live	Nov 14, 2023 3:53 PM	designer
	Store Geography	MS Excel	Uploaded	Nov 14, 2023 3:50 PM	designer
	Store Sales	MS Excel	Uploaded	Nov 14, 2023 3:59 PM	designer

Close

Click Close.

4. To join the data tables, click the **Join** icon.
- The *Join Key* will be the text column name that is found in both datasets.

Join SettingsTransform settingsAdvanced

Store GeographyMS Excel (xlsx)

Store SalesMS Excel (xlsx)

Left Column

Right Column

StoreStore

+ Add Data Table+ Join Key

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

Altair Panopticon

WorkbooksData LibraryWebhooksAlertsParametersThemes

Organization

Search Data Table

All

+ New Legacy Dataset

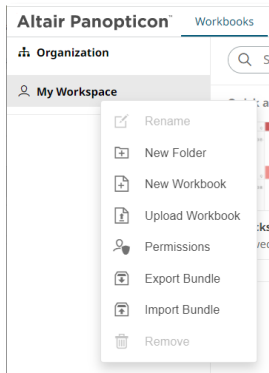
+ New Joined Data Table

	Name ↑	Connector	Type	Last Modified	Last Modified By
	BitCoinOrders	Text	Live	Nov 14, 2023 3:49 PM	designer
	StocksStatic	JDBC	Live	Nov 14, 2023 3:53 PM	designer
	Store Geography	MS Excel	Uploaded	Nov 14, 2023 3:50 PM	designer
	Store Sales	MS Excel	Uploaded	Nov 14, 2023 3:59 PM	designer

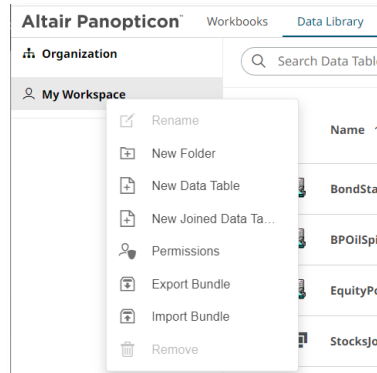
ORGANIZE YOUR CONTENT

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

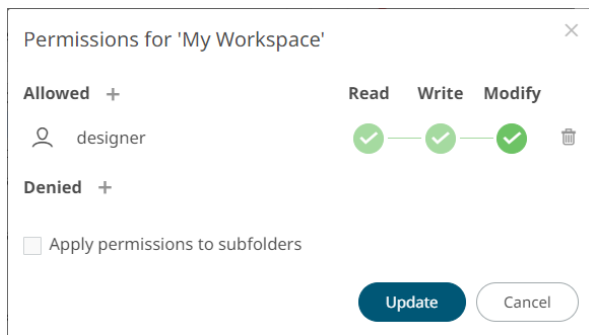
For Workbooks:



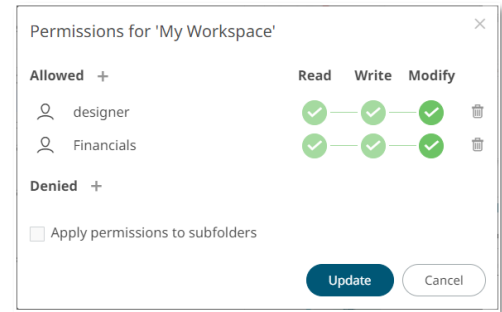
For Data Tables:



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



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



4. Click **Update**.

NEXT STEPS

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

- [Panopticon Web Authoring Guide](#)
- [Analyst Guide](#)