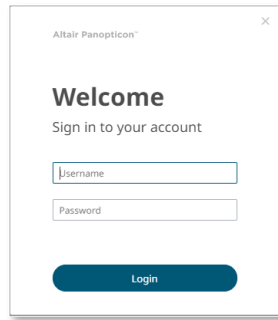
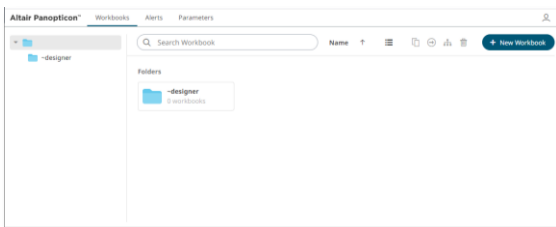


1 LOG ON TO THE PANOPTICON VISUALIZATION SERVER

1. On the Panopticon Visualization Server, click **Sign In**.
2. Enter the *Username* and *Password*.
3. Click **Login**.



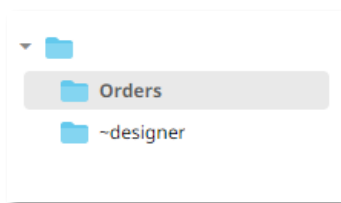
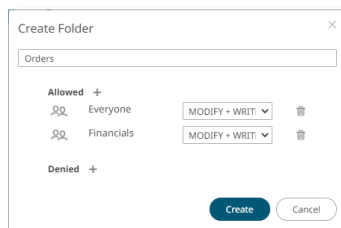
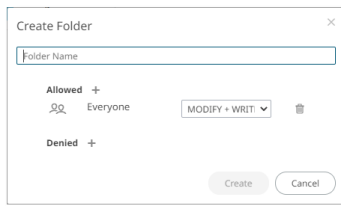
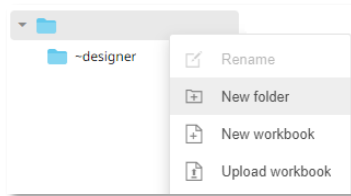
The *Workbooks and Folders* page displays with the personal folder where users with a Designer role can create workbooks and build dashboards.



2 CREATE A FOLDER AND ASSIGN PERMISSIONS

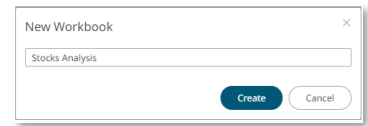
Workbooks can be saved, uploaded, copied, or moved to folders or subfolders where they can inherit the access or restriction settings.

1. Right-click on the root folder and select **New Folder** on the context menu.
2. Enter the *Folder Name* in the *Create Folder* dialog and click **+** beside the *Allowed* section. Select a *Group* that will be granted permission.
3. Select **MODIFY + WRITE + READ** and click **✓**. This means the group will be able to read, modify, and write to the folder as well as create subfolders.
4. Click **Create**. The folder is displayed on the *Folders* list.

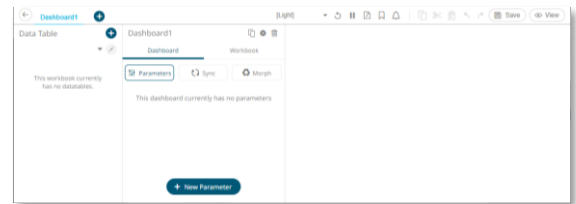


3 CREATE A NEW WORKBOOK AND CONNECT TO DATA

- To create a new workbook, click **+ New Workbook**. Enter the name **Stocks Analysis** and click **Create**.

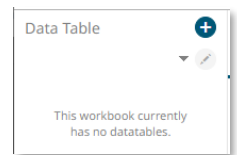


This opens the *Open Workbook on Edit Mode*.

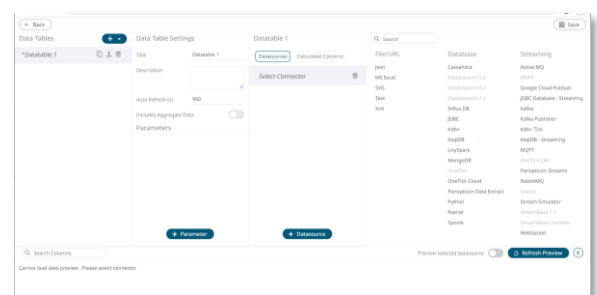


To proceed in creating workbooks, data tables must be added first.

- On the *Data Table* pane, click **+**.

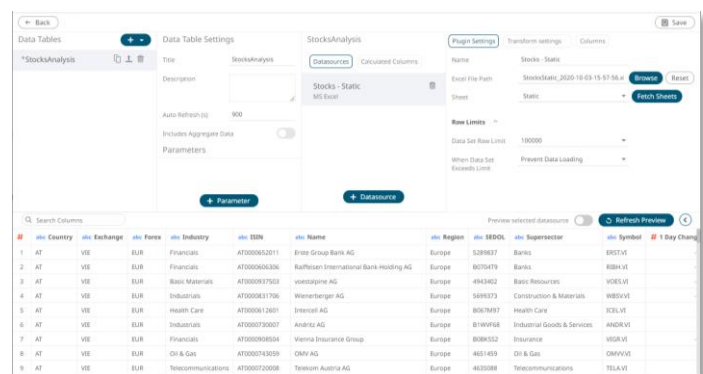
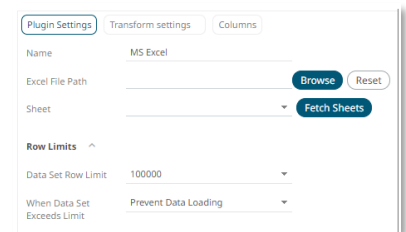


This opens the *Edit Data Table* layout. Select a data source to create a new table.



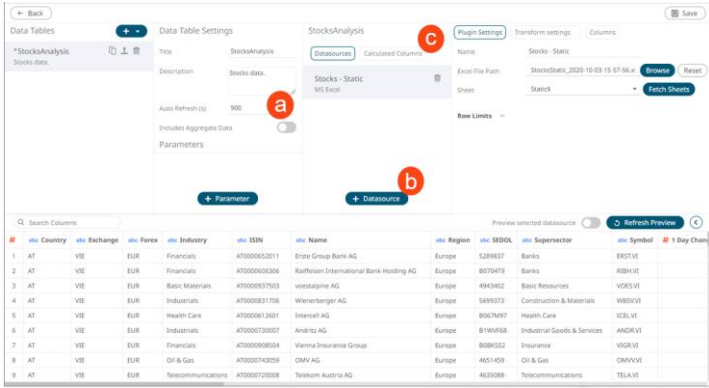
EXAMPLE: MS EXCEL DATA SOURCE

1. Select **MS Excel** in the *Connector List* pane. Browse to an MS Excel file and select it.
2. Select the sheet and the data access method to use.
3. Define initial settings.
4. Click **Refresh Preview**. The preview of the data table is displayed.



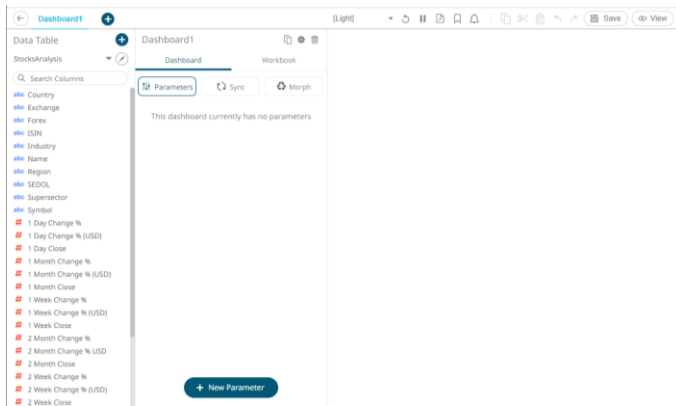
4 DEFINE/REFINE YOUR DATA TABLE USING THE EDIT DATA TABLE LAYOUT

1. Enter the name of the data table and click . Then give a description and set the *Auto Refresh* (a).
2. Click **Datasource** to add more data sources to the data table (b).
3. Click **Calculated Columns** to display the *Calculated Columns* pane and create new calculated columns in the data table (c).



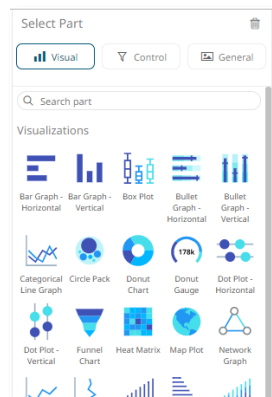
4. Click **Save** to save the changes then click **Back** to close the *Edit Data Table* layout and go back to the *Open Workbook* in *Edit Mode*.

The data table is displayed.

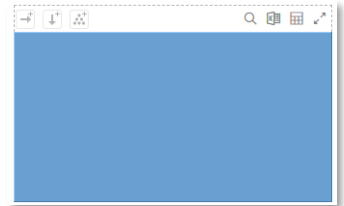


5 ADD A VISUALIZATION

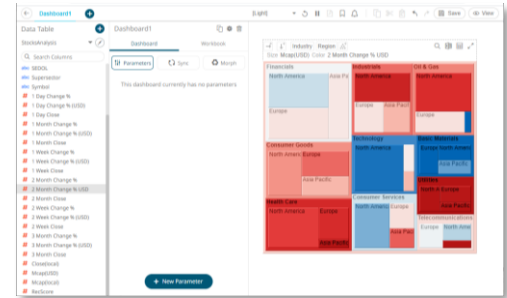
1. Draw a rectangle on the dashboard canvas to create a visualization. The *Select Part* pane displays with the available visualization parts.



2. Select a visualization. You will see a skeleton image of the visualization on the dashboard canvas.



3. Drag columns from the *Data Table* pane to the *Visualization Settings* pane to define the hierarchical breakdown and visualization variables (e.g., Size, Color, Icons, and so on).



6 ENHANCE YOUR VISUALIZATION

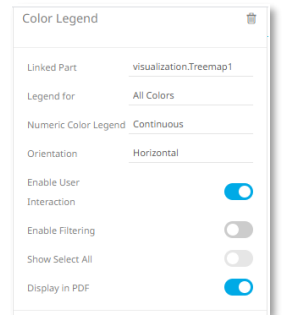
ADD LEGENDS

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

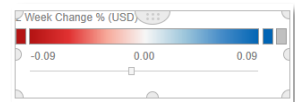


You will see a skeleton image of the legend.

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



The color legend displays.



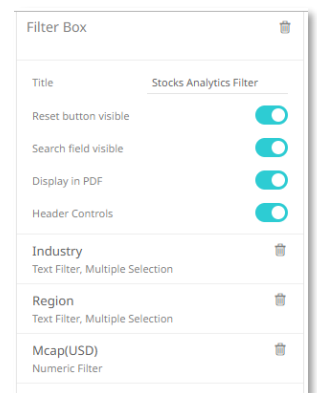
ADD FILTERS

1. Draw another rectangle on the dashboard canvas and click then the **Filter Box**

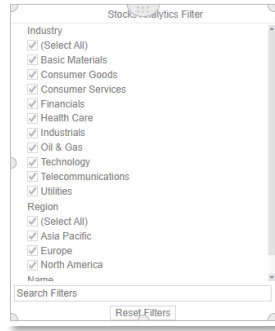


You will see a skeleton image of the filter.

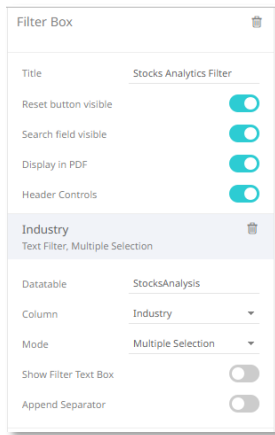
2. On the *Filter Box Settings* pane, enter the *Title* and define the other settings. Then drag and drop text columns from the *Data Table* pane.



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

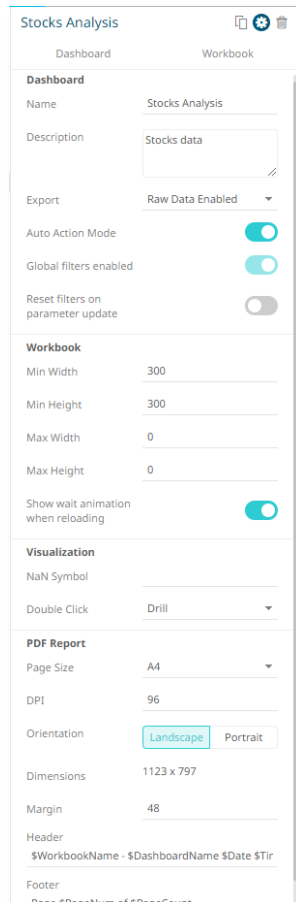


3. Click on a filter column to expand and modify the settings as required.



7 DEFINE THE DASHBOARD AND WORKBOOK SETTINGS

1. On the *Dashboard* pane, click . The *Dashboard and Workbook Settings* pane displays.
2. Enter and select the *Dashboard*, *Workbook*, *Visualization*, and *PDF Report* settings.

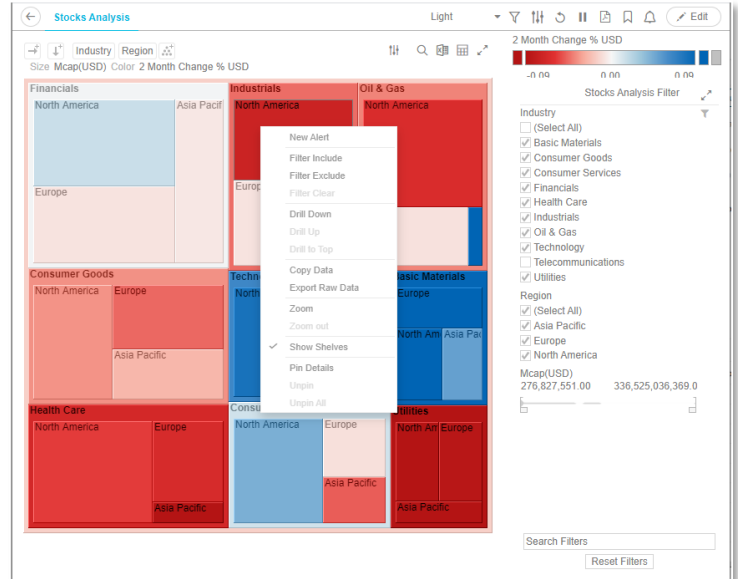


8 SAVE YOUR WORKBOOK

If you wish to save your workbook, click the **Save** icon on the toolbar. Once saved, the 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.



NEXT STEPS

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

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