pentaho

Version 5.4

Getting Started with Analyzer, Interactive Reports, and Dashboards

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Introduction

The **User Console** is a fun, easy to use, web-based design environment where you can analyze data, create interactive reports, dashboard reports, and build integrated dashboards to share business intelligence solutions with others in your organization and on the internet. In addition to its design features, the User Console offers a wide variety of system administration features for configuring the Business Analytics (BA) Server, maintaining Pentaho licences, setting up security, managing report scheduling, and tailoring system performance to meet your requirements.

The topics found in this section give you an overview of the reports and dashboards you create with the **User Console**, to help you became familiar with the look and feel of the console.

Prerequisites

Before you can work with the User Console, you will have to have installed the Pentaho software and configured the BA Server.

Expertise

The User Console does not require any special skills or knowledge to use its design environment. However, to use its system administration features you should know where your data is stored and how to access it, as well as details about your system configuration and security providers.

Tools

Through the **User Console** you can access these Pentaho tools and features, as well as the BA Repository on the BA Server.

- Analyzer
- Interactive Reports
- Dashboard Reports
- Dashboard Designer
- Data Source Wizard
- Data Source Model Editor

Login Credentials

These tasks require that you login to the User Console with an evaluator user name and password.

Get Started with Pentaho Reporting Tools

After you define the data sources for your BA Server, you are ready to begin working with the Pentaho User Console to create your first reports.

To create a report, just follow the directions in each tutorial. Each section uses the sample data sources that are included with the installation of the Pentaho suite of software.

It is time to take a look at the User Console and learn how to create reports. Just follow the *Guide Post* graphics as you work with the tutorials to create your first Pentaho Reports and Dashboards.

- Tour the Pentaho User Console
- Get Started with Interactive Reports
- Get Started with Analyzer Reports
- Get Started with Dashboard Designer
- Next Steps

Quick Tour of the Pentaho User Console

If you use file management tools or any web browser, you should feel right at home with the **Pentaho User Console**. To familiarize yourself with the different pages and controls of User Console, let us take you through a quick tour.

Log In to the User Console

Logging in to the User Console for the first time is easy with these steps.

1. Launch any web browser and enter the URL of the Pentaho server. The page loads an introductory screen with a **Login** section.
2. Enter your user name and password and click **Login**, or use the **Login as an Evaluator** option.

Home

The first thing you see after you login to the console is the **Home** page, which serves as the starting place for the **User Console** and all of the tasks that you do with it.

Item	Name	Function
1	**Home** view	The **Home** drop-down menu lets you flip easily from page to page, or return to your **Home** page.
2	**Getting Started**	• **Welcome** shows an introductory video about Pentaho products. • **Samples** holds a variety of sample reports and dashboards that you can use to get familiar with the software. • **Tutorials** contains a number of tutorial videos that give you a visual tour of the User Console, reports, and dashboards.
3	**Current User** and **Log Out**	Shows the name of the person currently logged in to the User Console. Clicking the arrow next to the name lets you log out of the User Console.
4	**Browse Files**	Brings you to the **Browse Files** window, where you can locate your files using the **Browsing** and **Files** panes, and manage them using the **Actions** pane. Any files that you open appear in a new window.
5	**Create New**	Gives you choices to create a new Analysis report, Interactive report, or Dashboard. You can also create a new **Data Source**, if you have permissions to work with data sources.
6	**Documentation**	Leads you to the Pentaho Documentation, which opens in a new window or tab.
7	**Recents, Favorites**	Shows a list of your most recently opened files. Clicking on the star next to a recently opened file adds it to your **Favorites** list.

Browse Files

The **Browse Files** page helps you keep your files organized and makes them easier for you to find and work with.
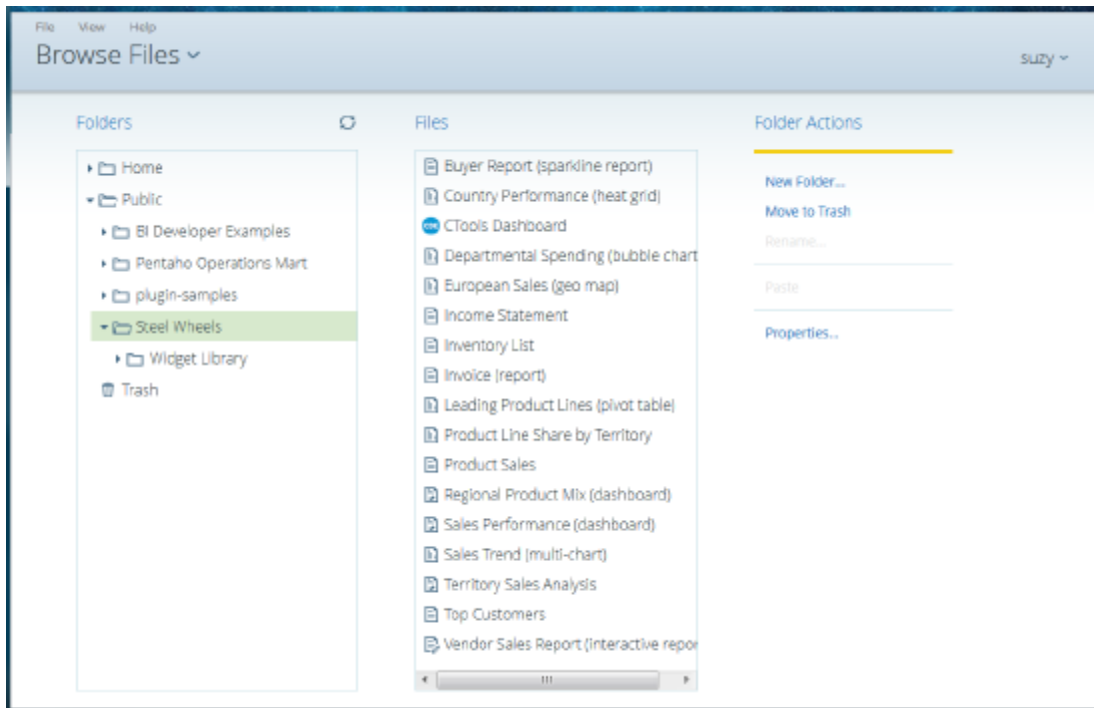
Opened

The **Opened** page activates after you open a file from the **Browse Files** page and provides a simple space to work with your files.
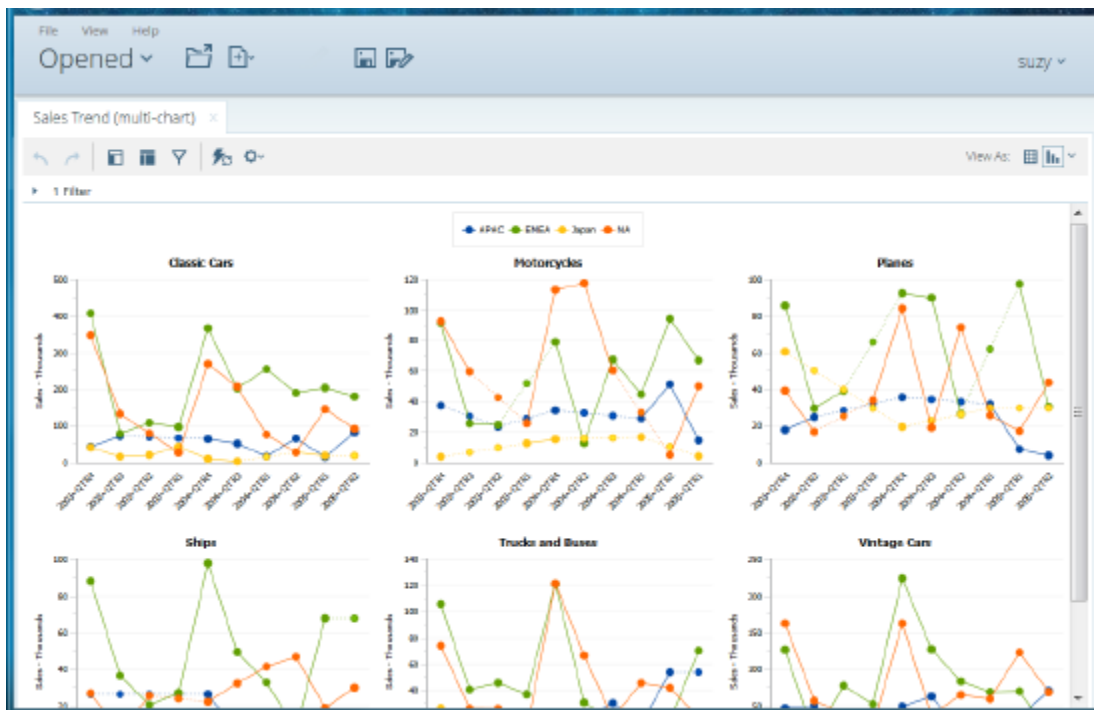
Schedules

All of your active scheduled reports appear in the list of schedules, which you can get to by clicking the **Home** drop-down menu, then the **Schedules** link, in the upper-left corner of the **User Console** page. You can also access your list of schedules from the **Browse Files** pane, if you have a report selected.

The list of schedules shows which reports are scheduled to run, the recurrence pattern for the schedule, when it was last run, when it is set to run again, and the current state of the schedule. You can edit and maintain each of your schedules by using the controls above the schedules list, on the right end of the toolbar.

Use Pentaho Tools

The Pentaho Business Analytics Suite download includes sample reports and a sample database called Steel Wheels. Steel Wheels is included so that you can quickly use the software and explore the Pentaho BA Suite.

This table helps you decide what tools to use for your needs and provides links to the corresponding articles.

| Explore Considerations	Choose Options		
	Interactive Reports	Analyzer Reports	Dashboard Designer
Summary	**Interactive Reports** is a web-based design interface which is used to create both simple and on-demand operational reports without depending on IT or report developers.	**Analyzer Reports** is an intuitive analytical visualization tool that filters and drills down into business information contained in Pentaho Analysis data sources.	**Dashboard Designer** allows users to create dashboards with little or no training. The dashboard is several different reports brought together inside one screen.
Expertise	Knowledge of basic computer functions, such as operating systems and web browsers.	Knowledge of basic computer functions, such as operating systems and web browsers.	Knowledge of basic computer functions, such as operating systems and web browsers.
Recommendation	Use **Interactive Reports** if you want to create a tabular report that answers an immediate business question, looks professional, can be printed quickly, and provides significant control over formatting elements such as fonts, column width or sorting, background colors, and more.	Use **Analyzer Reports** if you want to compile data quickly while visually exploring your data, perform advanced sorting and filtering of your data, and want to see chart visualizations that include detailed stop-lighting.	Use **Dashboard Designer** if you want to create an interface to view many different reports at once, have quick access to web pages that you visit often, or view dynamic charts and graphs within a space while you create reports in another.

Get Started with Interactive Reports

Interactive Reports is a web-based interface which is used to create on-demand operational reports.

Interactive Reports is a web-based design interface which is used to create both simple and on-demand operational reports without depending on IT or report developers. Use **Interactive Reports** if you want to create a quick report that answers an immediate business question, looks professional, and provides significant control over formatting elements such as fonts, column width or sorting, background colors, and more.

If you want to start creating your first report right away, feel free to jump ahead to Create Your First Interactive Report.

View an Interactive Report Sample

This section highlights some popular **Interactive Report** capabilities that are available, using the sample report called **Vendor Sales Report**, located in the Getting Started widget.

1. In the **Getting Started** widget on the **Home** perspective, click the **Samples** tab.
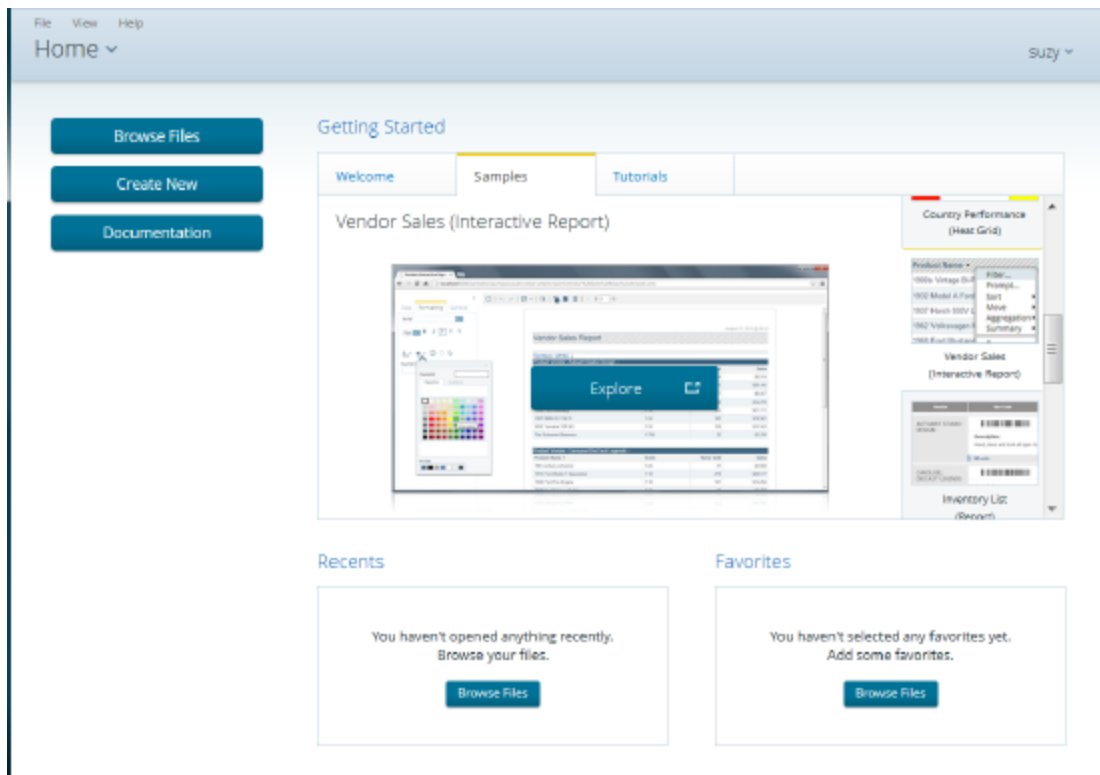
2. Click to select **Vendor Sales** from the scrolling panel on the right.

3. Click **Explore** in the **Samples** pane. A new window opens showing the **Vendor Sales** sample report.
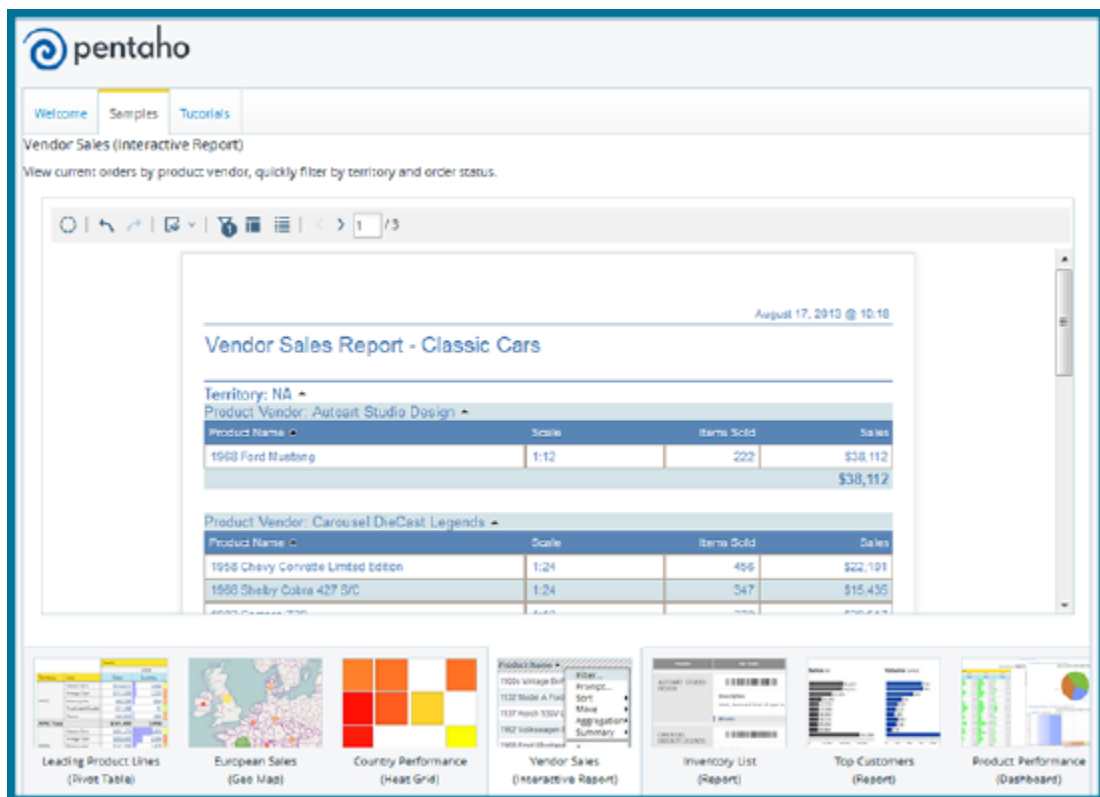
Tour the Interactive Panels

You can view the editable version of the **Vendor Sales** report in Interactive Reports by going to the Browse Files perspective in the User Console, and following these quick steps.

1. In the **Folders** pane, click to expand the **Public** folder, then click to highlight the **Steel Wheels** folder.
2. In the **Files** pane, double-click on **Vendor Sales**, and then click the **Edit** icon. The **Opened** perspective appears with the Interactive report and toolbars active.

Item	Name	Function
1	**Opened** view	Displays quick access buttons across the top to create and save new Analysis reports, Interactive reports, and Dashboards. Opened reports and files show as a series of tabs across the page.
2	**Data**, **Formatting**, and **General** panels	Use the **Data** panel to drag information into a column or a row on the report. Your report display changes as you drag items onto the **Report Canvas**. Delete a level or measure from your report by dragging it from the Layout panel to the trash can that appears in the lower right corner of the **Report Panel**. The **Formatting** panel allows you to change the font size and type on the opened report. The **General** panel allows you to set preferences, select a paper size for printing, and select from a variety of templates for your report.
3	**Report Canvas**	Shows a dynamic view of your Interactive report as you work to build it. The look of your report changes constantly as you work with **Data**, **Formatting**, and **General** panels to refine it.

| Item	Name	Function
4	**Interactive Toolbar** and **Filters**	Use the **Toolbar** functions to undo or redo actions, hide lists of fields, add or hide filters, disable the auto-refresh function, adjust settings, and change the view of your report. Use the **Filters** panel to display a list of filters applied to the active report, or edit or delete filters.

Create Your First Interactive Report

The instructions below guide you through the creation of your first Interactive report using the Steel Wheels sample data.

1. From the **Home** perspective, click **Create New**, then choose **Interactive Report**.
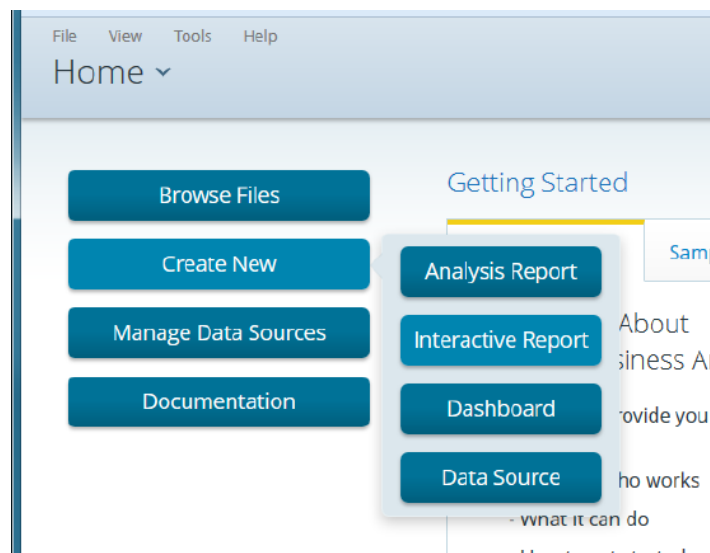
2. Choose the **Inventory** data source from the **Select Data Source** dialog box. Click **OK**.
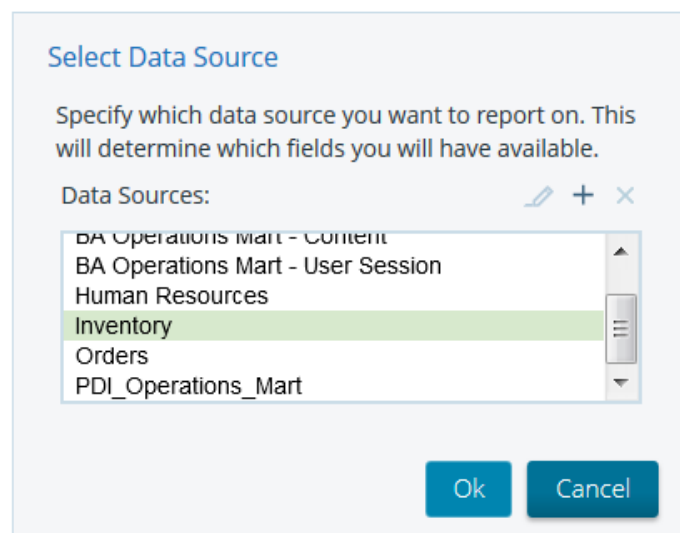
3. Click **Get Started** on the dialog box that appears. A blank Interactive report canvas appears.

4. Click and drag the **Product Code** element onto the report canvas until a highlighted vertical line appears. Drop it onto the **Report Canvas.**
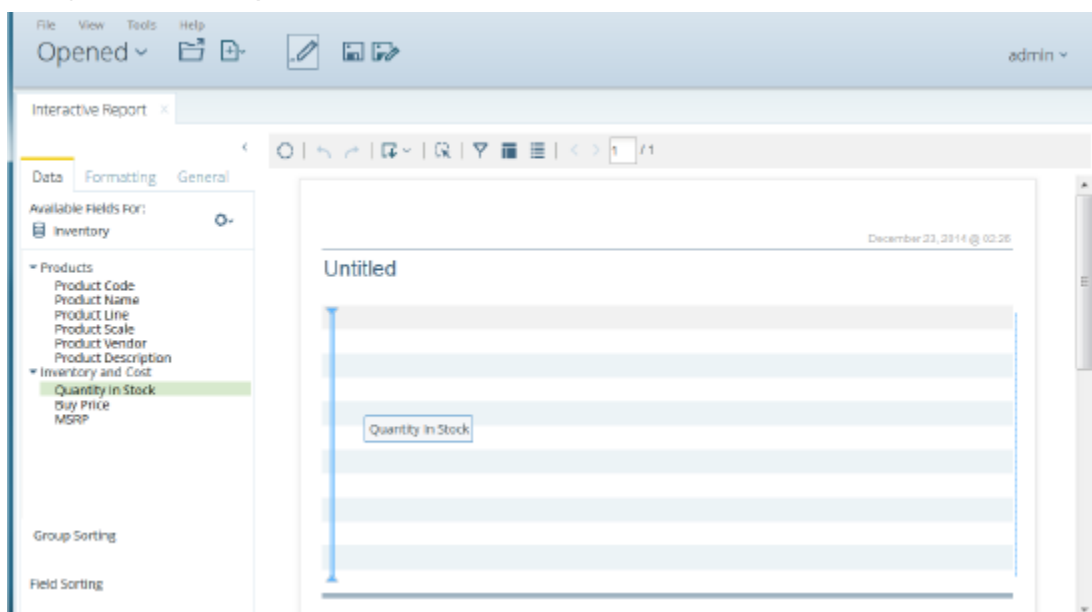
5. Continue dragging and dropping these fields onto the canvas: **Product Name**, **Product Vendor**, **Quantity in Stock**, **MSRP**, and **Buy Price**.

The data from the chosen fields appears on the report canvas and populates with the information from the server.

NOTE:

You can change the order of the columns by clicking the column heads and dragging the columns left or right until they are in the order you want. If you want to delete a column, just drag and drop the column title into the trash can.

6. Rename your report by double-clicking on **Untitled** in the **Report Canvas**, and typing a name in the field that appears. **In Stock Report** is used in this example.

7. After you have arranged your columns in order, apply a filter to the data by clicking on the **Filter** icon in the toolbar. After the filter pane expands, drag the **Product Code** field onto the filter workspace.
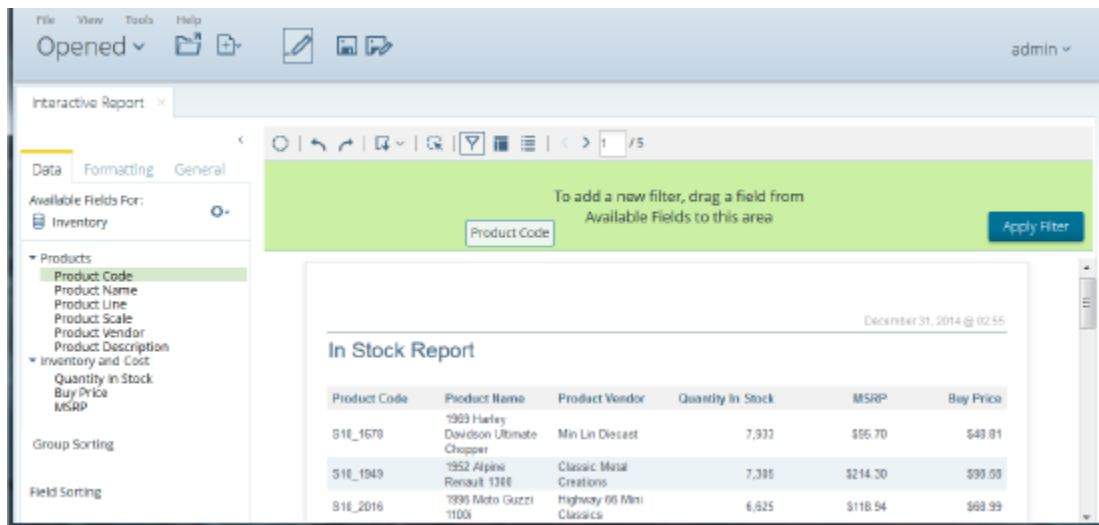
8. In the **Filter on...** dialog box, click **Select from a list**.
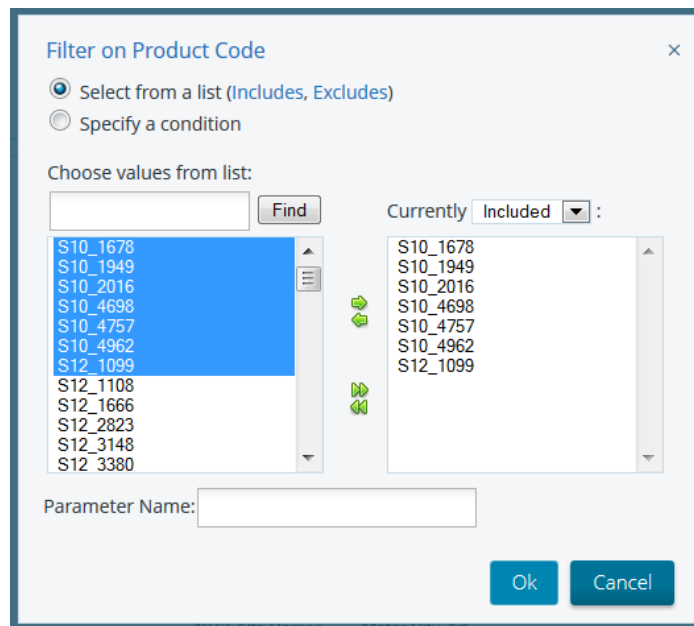
9. Choose items from the **Filter** list by using one of these methods.

Click on the arrows to move your selected filters on to or off of the **Filter** list.

- To choose more than one item from the **Filter** list, hold down the **Ctrl** key and click the items that you want to filter by, then click the top arrow to move the items to the right panel.

- Or you can choose a series from the list by holding down the **Shift** key and clicking on the first item you want to use, then clicking on the last item that you want to use.

- Choose individual items by clicking to highlight them, and then clicking on the top arrow to move it to the right panel.

10.

Click **OK**, then click the **Save As** button in the toolbar.
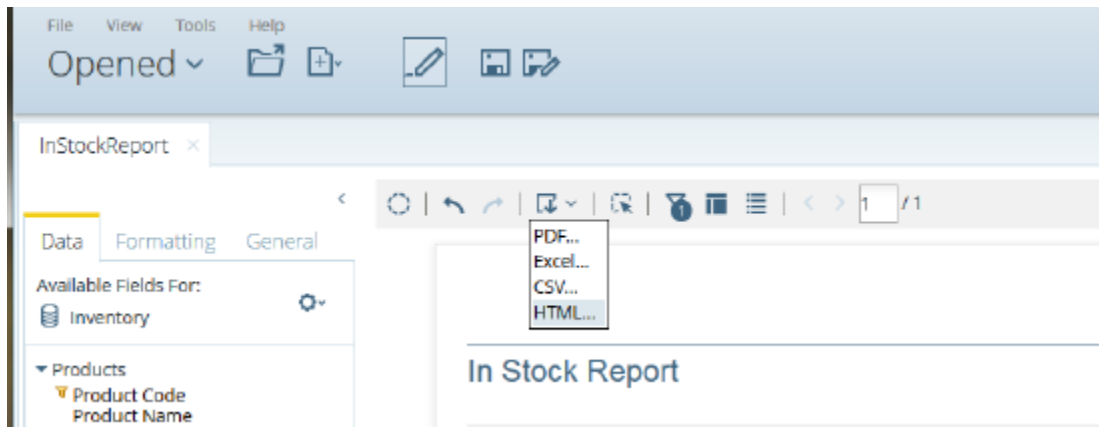
    A.

    When the **Save As** dialog box appears, save your report using the title that you used for your report.

    B.

    Choose your user folder as the location, and click **Save**.

11. If you want to export the report, click the **Export** icon on the toolbar and chose a format from the dropdown list for the export.
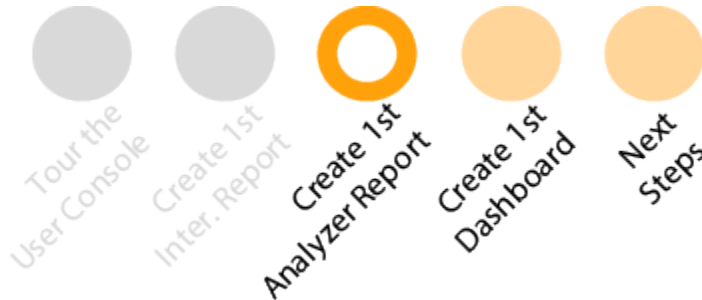

The report exports in the selected format and a paper copy can be printed from the export.

You have successfully created a simple Interactive report from scratch. Use Interactive Reports shows you how to work with more complex Interactive reports.

Get Started with Analyzer Reports

Analyzer Reports is an intuitive analytical visualization tool that filters and drills down into business information contained in Pentaho Analysis data sources. Use **Analyzer Reports** if you want to compile data quickly in an interactive environment, perform advanced sorting and filtering of your data, and want to see chart visualizations that include conditional stop-lighting.

View an Analyzer Report Sample

This section highlights some popular **Analyzer** capabilities that are available, using the sample report called *European Sales* located in the Getting Started widget.

1. In the **Getting Started** widget on the **Home** page, click the **Samples** tab.
2. Click to select **European Sales** from the scrolling panel on the right.
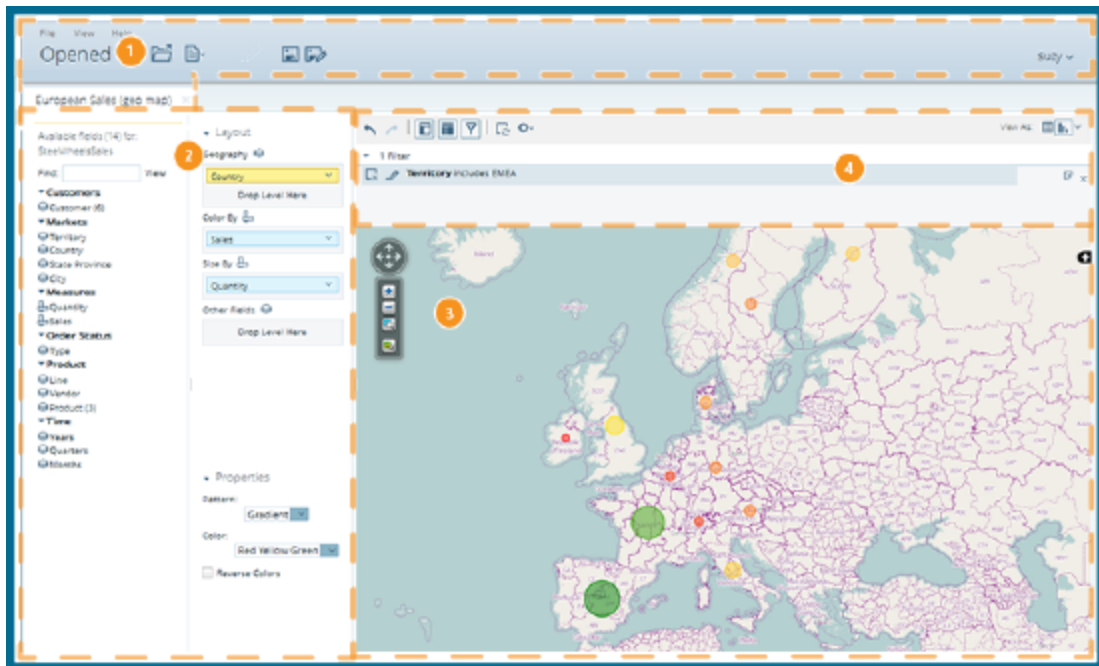3. Click **Explore** in the **Samples** pane.
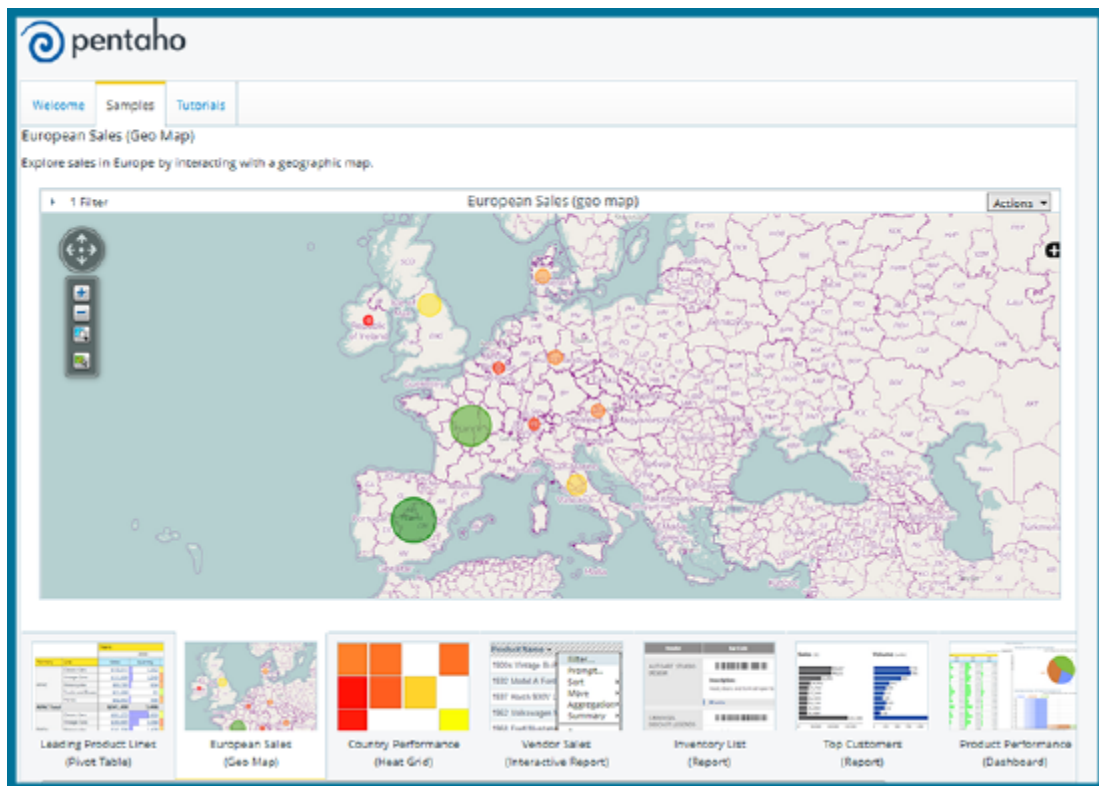
A new window opens showing the **European Sales** sample report.

Tour the Analyzer Panels

You can view the editable version of **European Sales** in Analyzer by going to the Browse Files page in the User Console, and following these quick steps.

1. In the **Browsing** pane, click to expand the **Public** folder, then click to expand the **Steel Wheels** folder.

2. In the center pane, double-click on **European Sales**. The **Opened** page appears with the Analysis report. Click the **Add More Fields** and **Rearrange Fields** icons on the toolbar to expand the **Available Fields** and **Layout** panels.

| Item	Name	Function
1	**Opened** view	Displays quick access buttons across the top to create and save new Analysis reports, Interactive reports, and Dashboards. Opened reports and files show as a series of tabs across the page.
2	**Available Fields** and **Layout** panels	Use the **Available Fields** and **Layout** panels to drag levels and measures into a report. Your report displays changes in the **Report Canvas** as you drag items onto the **Layout** panel. Delete a level or measure from your report by dragging it from the Layout panel to the trashcan that appears in the lower right corner of the **Report Canvas**.
3	**Report Canvas**	Shows a dynamic view of your report as you work to build it. The look of your report changes constantly as you work with **Available Fields** and **Layout** panels to refine it. The **Report Canvas** shows different fields based on the chart type selected.
4	**Analyzer Toolbar** and **Filters**	Use the **Analyzer Toolbar** functions to undo or redo actions, hide lists of fields, add or hide filters, disable the auto-refresh function, adjust settings, and change the view of your report. Use the **Filters** panel to display a list of filters applied to the active report, or edit or delete filters.

Create Your First Analyzer Report

The instructions below guide you through the creation of your first Analyzer report, using the Steel Wheels sample data.

1. From the User Console **Home** page, click **Create New**, then choose **Analysis Report**.

2. Choose the **Steel Wheels** data source from the **Select Data Source** dialog box. Click **OK**. A blank Analyzer report appears.

3. Click and drag the **Territory** element and drop it into the **Rows** field. Click and drag the **Years** element and drop it into the **Columns** field. Click and drag the **Sales** element into the **Measures** field.
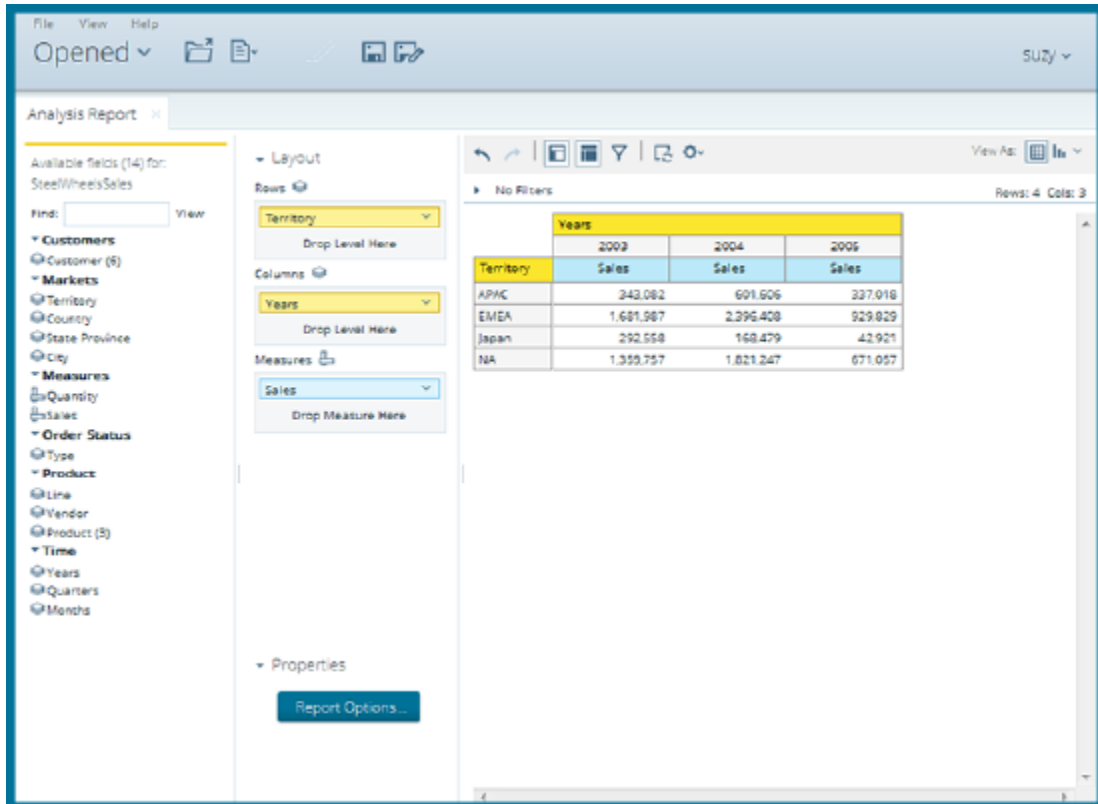

A table with the **Territory**, **Years**, and **Sales** data appears and populates with the information from the server.

4. Click and drag the **Line** field and drop it next to the **Territory** column on the canvas. Right-click the **Line** column header and select **Show Subtotals** from the menu that appears.
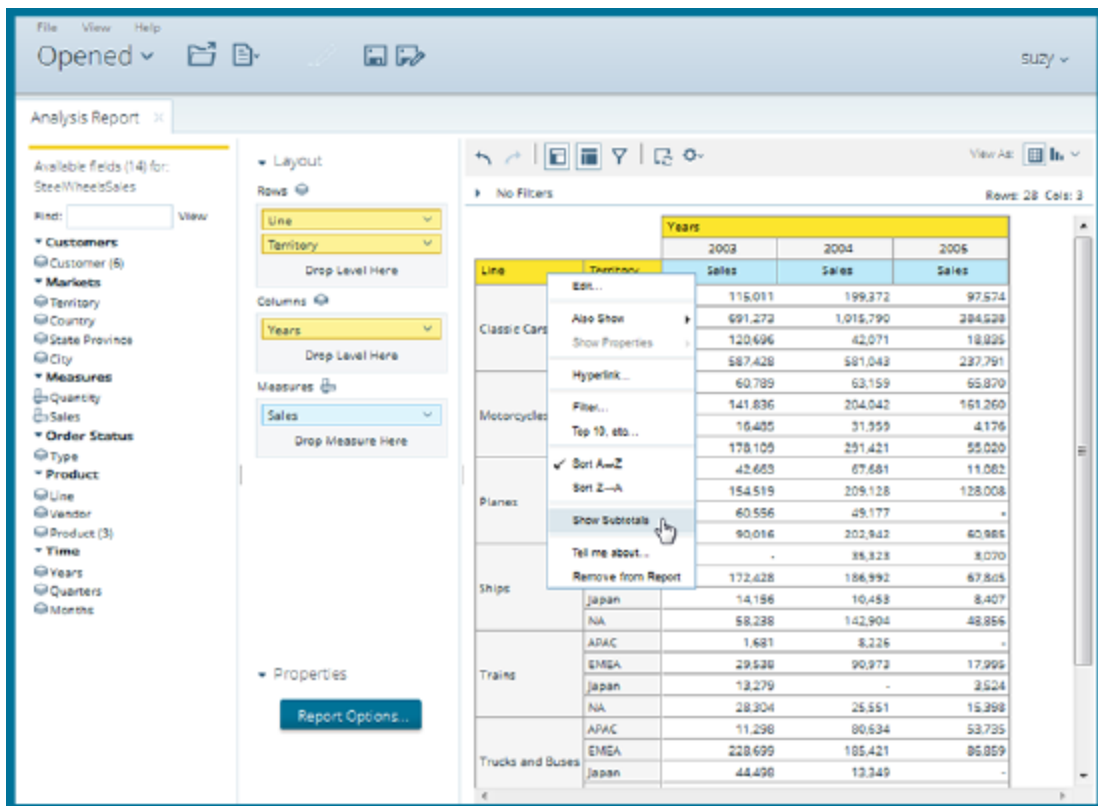
5. Right-click the first **Sales** column and select **Conditional Formatting** -> **Data Bar - Green** in the menu that appears.

6. Right-click the same **Sales** column and select **User Defined Measure** -> % of **Rank, Running Sum...** In the dialog box that appears, select the radio button next to **% of Sales**. Click **Next**.
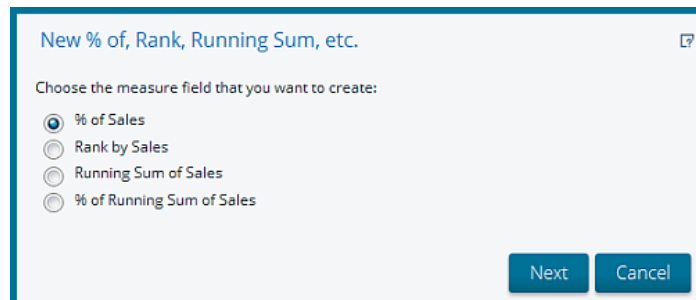
7. Select the radio button for **Each Line Column/Row Subtotal (Subtotal is 100%)**. Click **Done**.
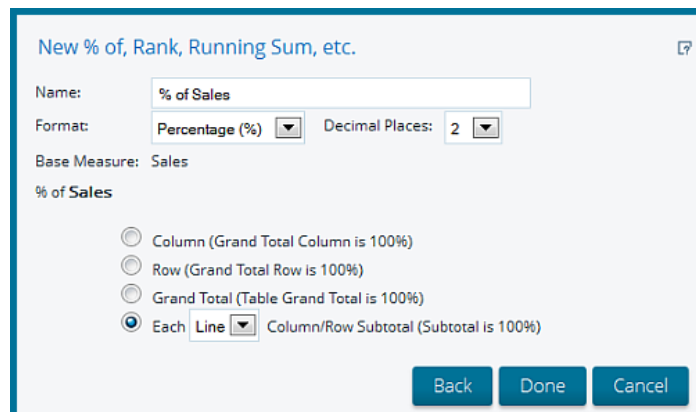
8. Expand the **Filters** canvas by clicking the **Show Filters** icon. Click and drag the **Territory** field from the **Available Fields** panel into the filter canvas. The **Filter on Territory** dialog box appears.

9. In the **Filter on Territory** dialog box, select **APAC** from the list and click the top, right-pointing arrow to move it to the box on the right.

10. Enable **Parameter Name** by clicking on the check box in the bottom left of the dialog box. Type **region** as your parameter name in the text box. Click **OK**.
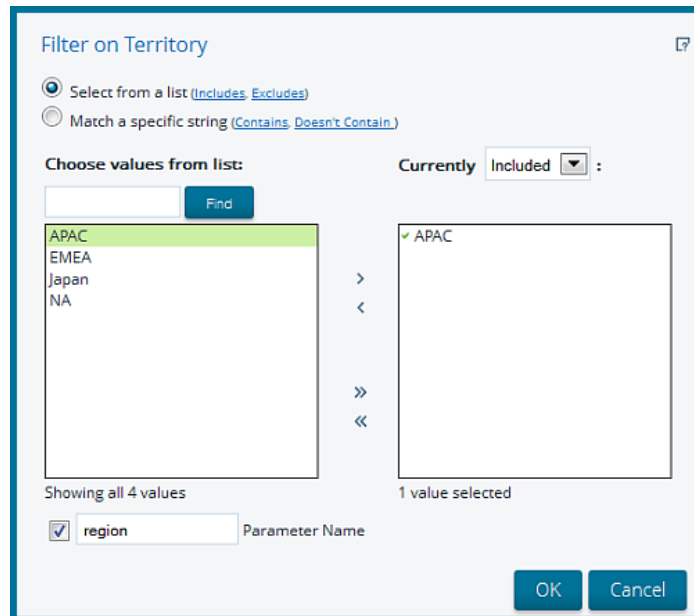
The report updates and displays sales data for APAC exclusively.

Click the line that separates each column to adjust it for better viewing. Move the line right or left as needed.

11. Click the **Save As** icon in the toolbar. When the **Save As** dialog box appears, save your report as **Territory - Sales** in your user folder and click **Save**.

You have successfully created a simple Analyzer report from scratch. You may export the report to one of several different formats or close the report. Use Analyzer Reports guides you through working with complex Analyzer reports.

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# Get Started with Dashboard Designer

Dashboard Designer allows you to create dashboards with little or no training. The dashboard is several different reports brought together inside one screen. Use **Dashboard Designer** if you want to create an interface to view many different reports at once, have quick access to web pages that you visit often, or view dynamic charts and graphs within a space while you create reports in another.

View a Dashboard Sample

This section highlights some popular Dashboard Designer capabilities that are available, using the sample dashboard called **Sales Performance (Dashboard)**, located in the Getting Started widget.
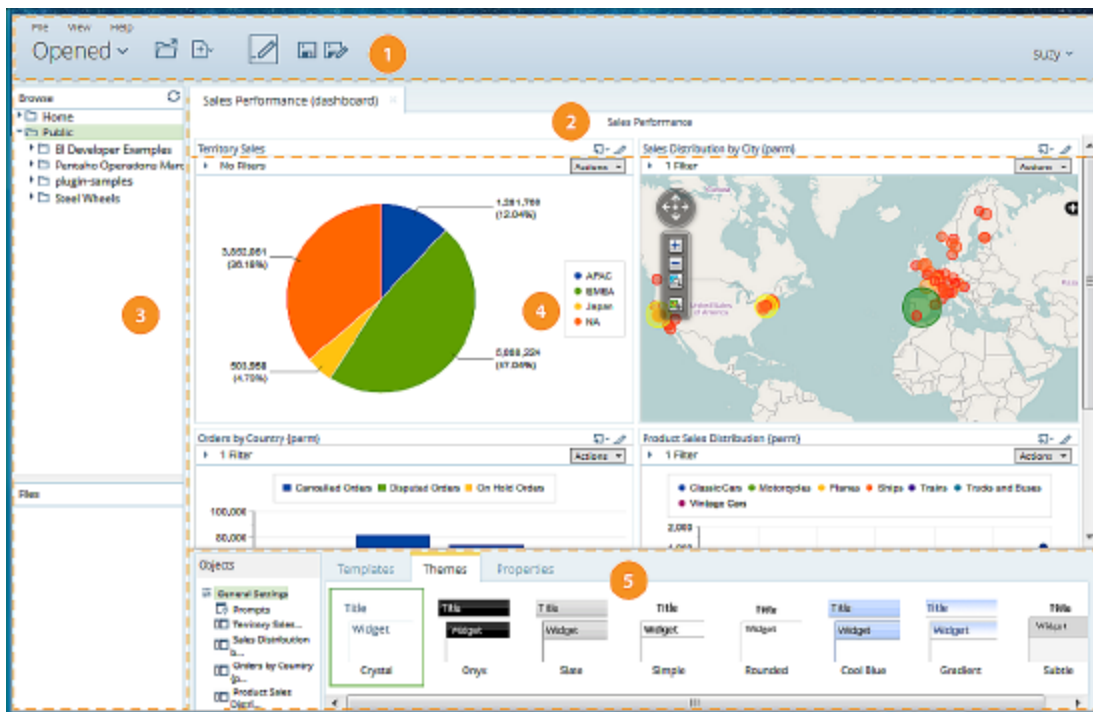
1. In the Getting Started widget on the Home page, click the **Samples** tab.
2. Scroll to the right to find the Dashboard samples.
3. Click on **Sales Performance (Dashboard)** to view the sample.
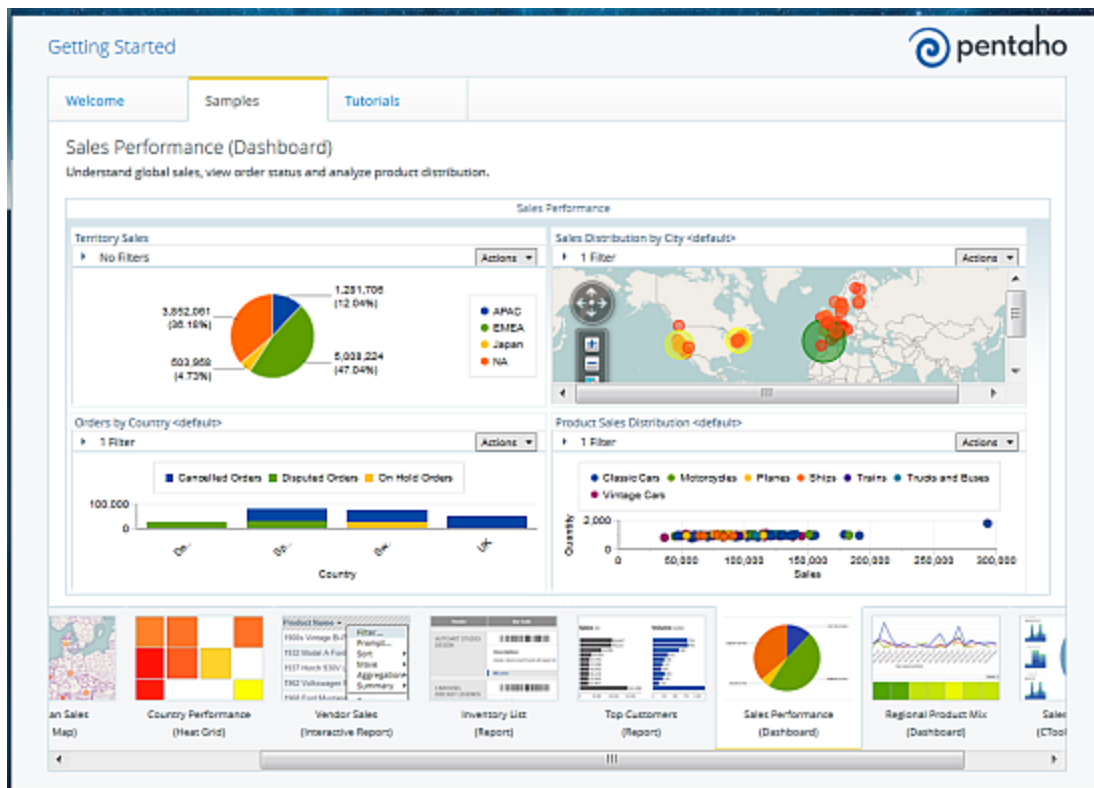
Tour the Dashboard Panels

You can view the editable version of the **Sales Performance (Dashboard)** in Dashboard Designer by going to the **Browse Files** page in the User Console, and following these quick steps.

1. In the **Folders** pane, click to expand the **Public** folder, then click to highlight the **Steel Wheels** folder.
2. In the center pane, double-click on **Sales Performance (Dashboard)**.
3. After the dashboard opens, click the **Edit** icon in the toolbar.

Item	Name	Function
1	**Opened** view	Displays quick access buttons across the top to create and save new Analysis reports, Interactive reports, and Dashboards. Opened reports and files show as a series of tabs across the page.
2	**Prompts** panel	The **Prompts** panel gives you a way to add filters to the individual parts of your dashboard.
3	**Browse Folders and Files** panel	Locate your files using the **Browse** and **Files** panels, and add them to dashboards.
4	**Dashboard** canvas	Shows a dynamic view of your Dashboard as you work to build it. The look of your dashboard refreshes as you add content from the **Browse Folders and Files** panels, and work with the **Prompts** or **Objects** panels.
5	**Objects** panel	Refine the look of your dashboard with the **Objects** panel by choosing a dashboard template or changing the titles for each object in the dashboard.

Create Your First Dashboard

1. From the User Console **Home** page, click **Create New**, then choose **Dashboard**.
2. In the Edit Pane, click **Templates** tab and select the **2 over 1** layout to use for this exercise.
3. Click **Properties**, and type **My Dashboard** in the **Page Title** text box. This is the title for your dashboard page.
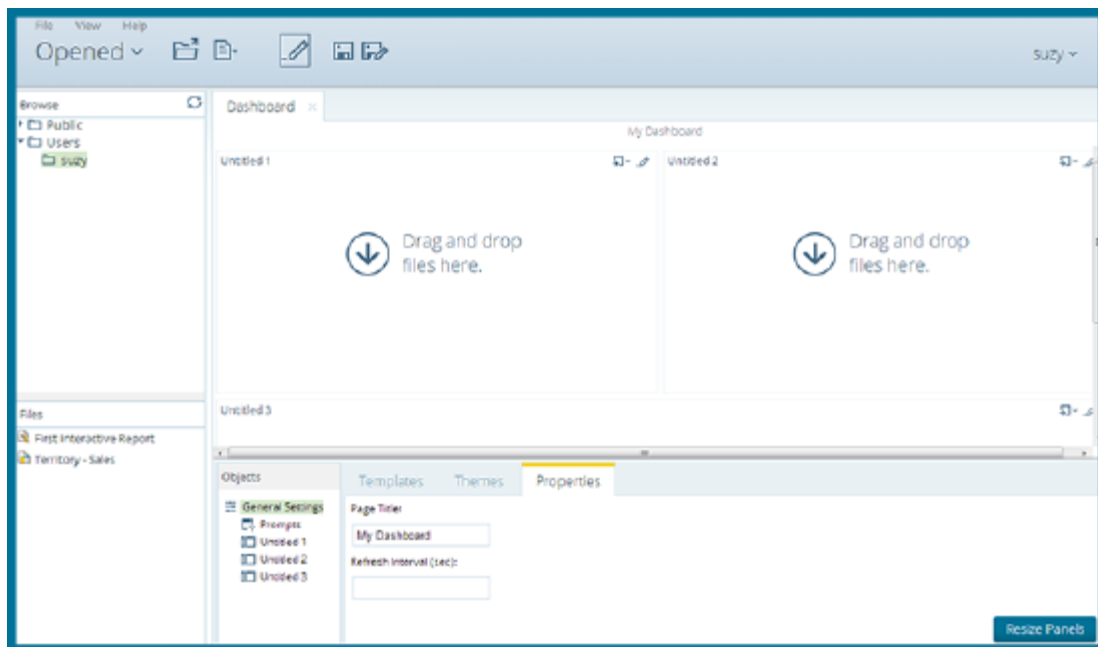
4. Click the **Themes** tab and select the theme of your choice. The new theme will be applied to your dashboard immediately.

5. Locate the Analyzer report you created earlier by going to the Browse pane to the left of the Dashboard canvas and clicking on the **Users** folder and clicking to highlight your folder. Click-and-drag the **Territory - Sales** file from the **Files** pane and onto the top-left dashboard panel.

6. Within the Edit Pane, type **Territory - Sales** in the **Title** text box and click **Apply**. The dashboard panel is populated with the **Territory - Sales** report.
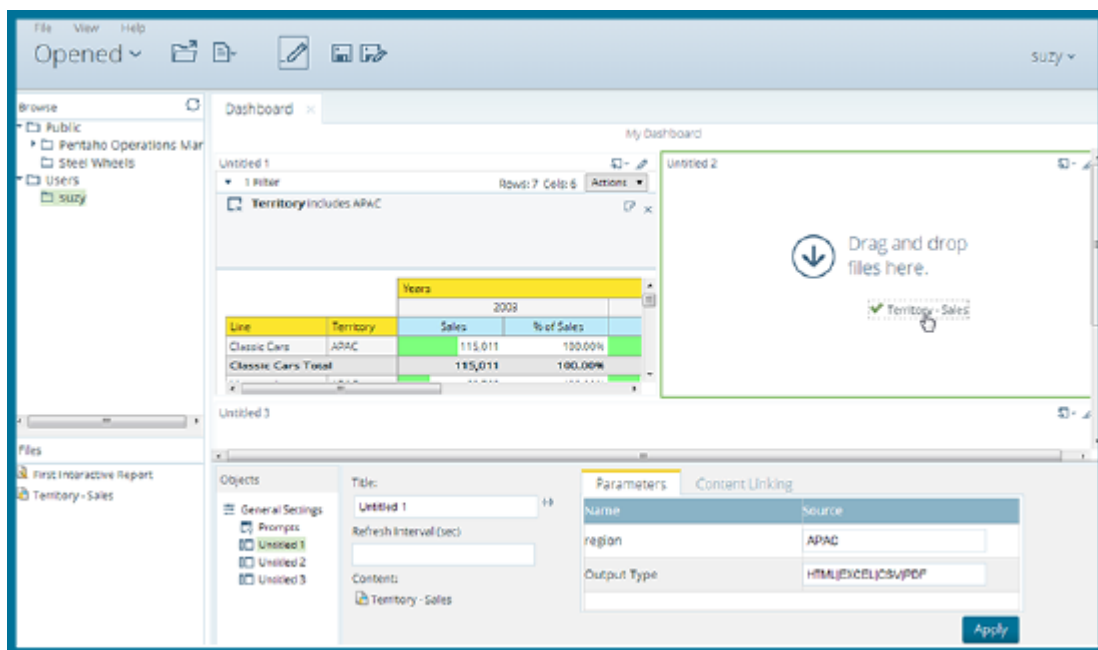
7. Locate your Interactive report by going to the **Browse** pane to the left of the Dashboard canvas and clicking on the **Users** folder and clicking to highlight your folder. Click-and-drag the **First Interactive Report** file from the **Files** pane and onto the top-right dashboard panel.

8. Within the Edit Pane, type **First Interactive Report** in the **Title** text box and click **Apply**. The right dashboard panel is populated by the **First Interactive Report** report. You can drag any report from the **Steel Wheels** folder in **Public** into the bottom dashboard panel.

9. Click on the **Save as** icon in the toolbar. When the **Save As** dialog box appears, save your dashboard as **My Dashboard** in your user folder and click **Save**.

    a. Close the dashboard, then go to **Browse Files** and double-click on **My Dashboard** in the **Files** pane.
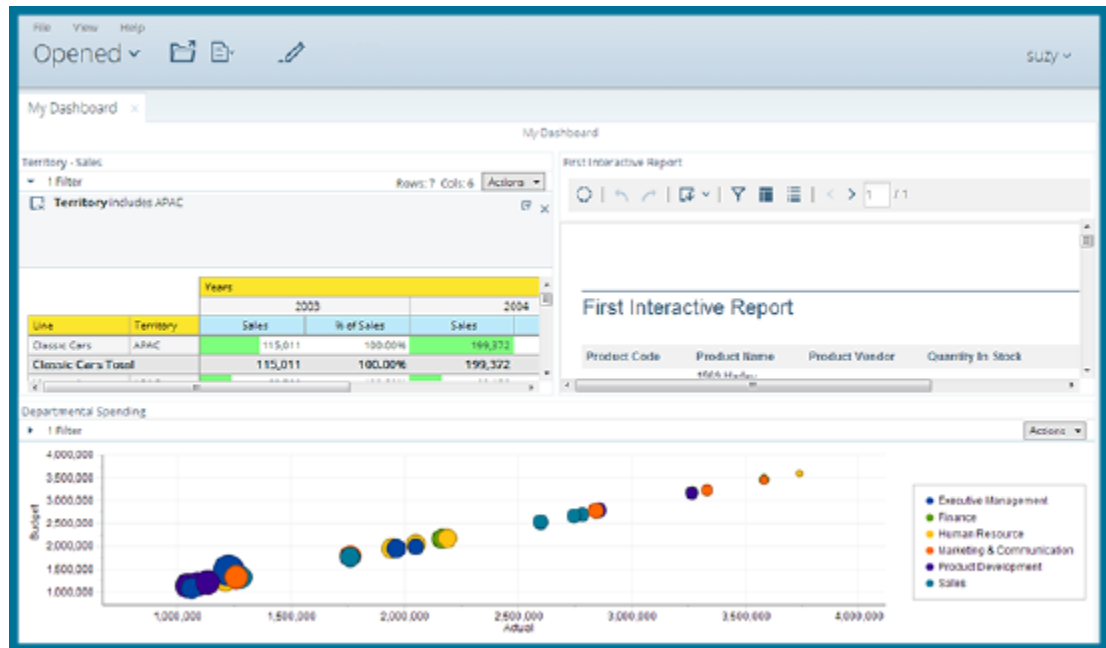
You have successfully created a simple Dashboard from scratch. Use Dashboard Designer illustrates how to work with complex dashboards.

Next Steps

After you have finished working through the walk through tutorials, you are ready to learn more about Pentaho reporting.

Learn More

- [Create Analysis, Interactive Reports, and Dashboards](#) provides in-depth details about creating eye-catching business intelligence deliverables for your user community.

- The [Build Full-Featured Solutions](#) category contains a large number of topics on working with the BA Suite. Here you can learn about defining data models, fine-tuning your reports and dashboards, how to create print-quality reports, or work with Big Data.

- [Work with Big Data](#) tells you how to use big data as a data source.