Pentaho User Console Commmunity Edition 2.0 Guide

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Company Information

Pentaho Corporation
Citadel International, Suite 340
5950 Hazeltine National Drive
Orlando, FL 32822
Phone: +1 407 812-OPEN (6736)
Fax: +1 407 517-4575
http://www.pentaho.com

E-mail: communityconnection@.pentaho.com
Sales Inquiries: sales@pentaho.com
Alliances: alliances@pentaho.com

Sign-up for our newsletter:
http://community.pentaho.com/newsletter/

Contents

Introduction to the Pentaho User Console

Introduction to the Pentaho BI Server user interface.

The Pentaho BI Server is a Web-based framework that leverages elements of Pentaho Analysis and Pentaho Reporting to provide easy-to-use tools for creating and sharing analysis views and ad-hoc reports. It is the heart of the BI Suite, which includes powerful software to prepare your data and create detailed reports. The BI Server Community Edition includes two graphical user interfaces: The Pentaho User Console, which helps you discover patterns, trends, and other hidden information about your data; and the Administration Console, which enables sysadmins, IT managers, CIOs, and database administrators to control low-level configuration and access permissions settings.

The purpose of this guide is introduce Community Edition users to the Pentaho User Console.

Prerequisites

Required knowledge and skills for BI Server Community Edition users.

In order to successfully use the Pentaho User Console, you must have previous experience or training in creating business reports and/or analysis views. While the newly redesigned graphical interface should be intuitive for an experienced business application end user, successfully creating a report or analysis view requires analytical skills and familiarity with your company's proprietary data. It also requires your data to have been prepared for analysis and reporting through Pentaho's sophisticated metadata tools.

This guide assumes that the Pentaho BI Server Community Edition is already installed, configured, and running, and that you have a BI Server user account. If you do not know the URL for your BI Server, or if you have not yet received your login credentials, contact your system administrator or CIO.

System Requirements

Required system specifications for Pentaho BI Server Community Edition end-users.

To successfully access and work with the Pentaho BI Server Community Edition 2.0, your software environment must meet these requirements:

Operating system: Windows XP SP2 32-bit, Red Hat Enterprise Linux 5 32-bit, and Mac OS X 10.5.

Java VM: Sun 1.5.0 32-bit.

Web browser: Firefox 2.0 or Internet Explorer 7.

It is possible that newer versions of these programs may work reasonably well. It is likely that other Linux distributions, Windows Vista, and other operating systems such as Solaris 10 will work reasonably well as long as they meet the Java requirement. In some instances, Pentaho may even perform a minimum level of testing with other OSes, VMs, and browsers; however, only the configurations listed above are officially supported.

Pentaho BI Suite Documentation

A list of all of the BI Suite Enterprise Edition 2.0 documentation resources.

This guide is designed for the Web interface integrated into the Pentaho BI Server. Enterprise Edition customers are entitled to access a more comprehensive version of this guide, plus further documentation that covers more advanced aspects of this and other Pentaho software:

Document Name	Purpose
Pentaho User Console Enterprise Edition 2.0 Guide	A comprehensive guide to the Pentaho User Console.
Pentaho Enterprise Edition 2.0 Administrator's Guide	A sysadmin and database administrator's guide to advanced BI Server configuration, including security integration, product maintenance, and performance tuning.
Pentaho BI Suite Enterprise Edition 2.0 Basic Installation Guide	An installer's step-by-step guide to deploying the BI Suite with the preconfigured Tomcat application server, and the supported solution database of your choice.
Pentaho BI Server 2.0 Advanced Deployment Guide	An installer's step-by-step guide to building and deploying the BI Server for all supported solution repository databases and application servers.
Pentaho Report Designer User Guide	A comprehensive, task-based user guide for Report Designer.

Getting Started

Your first steps as a Pentaho BI Server Community Edition user.

Follow the instructions below to log into the Pentaho User Console and familiarize yourself with its graphical interface.

How to Log Into the Pentaho User Console

Instructions for logging into the Pentaho BI Server Community Edition as a normal user.

Follow the below process to log into the Pentaho User Console.

1. Open a Web browser and type in the Web or IP address of the Pentaho server.

   You'll see an introductory screen with some Pentaho-related information and a **Login** button in the upper right corner.
2. Click **Login**.

   A login-related popup dialog will appear.
3. Select your username from the drop-down box, type your password into the appropriate field, then click **Ok**.

You are now logged into the Pentaho User Console and ready to start creating and running reports.

Navigating the Pentaho User Console

How to navigate the Pentaho BI Server user interface.

The Pentaho User Console was designed to be intuitive to users accustomed to standard file managers like Windows Explorer, and Web browsers like Firefox.

The first thing you will see after logging in is the Welcome Screen, shown here:

Click one of the three icons in the center of the screen to start a new ad-hoc report, start a new analysis view, or open the browser panel to run or edit existing solutions.

The button bar near the top of the page also contains icons for starting new ad-hoc reports and analysis views, along with a button to print the current report or analysis view, and to open a previously saved solution.

The menu above the button bar performs these same functions, plus administrative actions if you are logged in as an administrator, and also offers access to My Workspace and external links to help and support resources.

The Welcome Screen will appear when you log into the Pentaho User Console for the first time, and when you close all tabs in the solution browser.

You can change views between My Workspace and the solution browser at any time through the **View** menu.

Creating an Ad-hoc Report

How to create an ad-hoc report in the Pentaho User Console.

Pentaho Report Designer is the most comprehensive report design tool in the BI Suite, but for preliminary report exploration or to generate a report quickly, nothing beats the ad-hoc report wizard built into the Pentaho User Console. Ad-hoc reporting helps users quickly identify and group interesting or and relevant data, apply constraints to it, and generate a report. The resulting reports are viewable through the built-in preview feature; through a Pentaho Reporting-based Web application; or as a standalone PDF, XLS, CSV, or HTML file. To create an ad-hoc report, follow these steps:

1. In the **File** menu, select the **New** sub-menu, then click **New Ad Hoc Report...**.

   The Ad-hoc Reporting wizard will appear in a new solution browser tab.
2. In the first step of the wizard, select a **Business Model**. The **Business Model Details** table will populate with available tables and columns.

   Business Models are defined by your solution metadata, which your administrator can create or modify with the Pentaho Metadata Editor.
3. In the **Apply a Template** field, select a predefined report template. A thumbnail preview of the template will appear in the **Template Details** field.

   A template specifies a variety of properties in the report that affect its appearance, like font size and background colors for various report elements.
4. Click **Next** to proceed to the next screen.
5. In the **Available Items** list, select the business columns that you want to see in your report, and click and drag them to the **Groups**, **Details**, or **Filters** lists on the right. You must have at least one business column in the Details list for a report to be valid.

   You can select multiple items by holding down the **Ctrl** key. If you want to delete an item, click the **X** in the upper right corner of the field the item is in; if you need to move an item up or down in the list or to other groups, click the up or down arrows at the top of the **Groups** list.
6. In the **Preview as** drop-down box, select a preview format, then click **Go**. When the preview appears in a new browser window or tab, verify that it contains the data you selected and that it's presented appropriately.
7. Click **Next** when you're ready to start refining your report.
8. Click the **Level 1** item in the **Groups** list. The **General** options list will appear on the right.
9. Modify the level options to your preference.

   By default, the **Show Group Summary** checkbox is selected; uncheck it if you do not want to see group summary information. The default name for the group summary uses the group name as a variable; you can change this if you like. The options in the **Formatting** lists determine where in the report the information in the selected level will appear.
10. Repeat the above two procedures for other levels that you configured earlier.
11. Click the first item in the **Details** field. Three new options lists will appear on the right.
12. In the **Formatting** field, select the numerical formatting and alignment options appropriate for your situation.

13. In the **Calculation** list, select the function you want to use to refine the element you selected. For instance if you selected a Business Column that contains product prices, clicking on **Sum** would add all of the prices together.
14. Click **Add a Constraint**. The field will expand to show the name of the element, a conditional drop-down box, a text field, and a checkbox.
15. Select a conditional symbol from the drop-down box, then type in a value in the text box.

    This specifies the exact constraint you are applying to the element, meaning that you are decreasing the amount of detail by adding a higher level of specificity.
16. Add further constraints as necessary by clicking **Add a Constraint** again. Remove a constraint by clicking its checkbox and then clicking the **X** at the top of the list.

    If there is more than one constraint in the list, you will have the option of adding conditional operators for the constraints via a drop-down box to the left of each item in the list, meaning you can specify AND or OR conditionals on each constraint.
17. In the **Sort Columns** field, click **Add** to specify how each element in the Details list should be sorted, then select the sort order from the drop-down box.
18. Repeat the above steps for any other items in the **Details** list.
19. Click the first item in the **Filters** list. The **Constraints** list will appear on the right.
20. Add constraints as necessary, per the above instructions for adding constraints to items in the Filters list.

    For string-type Business Columns, you will have the option of searching the database tables that apply to the column. When this option is available, it is accessible via a magnifying glass icon to the right of the text box.
21. Repeat the above instructions for additional filters.
22. Click **Next** to move on to the next screen.
23. To set the header, footer, description, paper type, and page orientation, change the values accordingly.

    PDF is the only output type that has a concept of a page, so the **Page** portion of the **Header** and **Footer** sections only applies to PDFs.
24. Click the **Save as** button to save your report. In the ensuing file dialog, navigate to the location you want to save the report to, type in a filename for the report, and click the checkboxes next to the file formats you want to save in.

    You can continue to modify your report after it's been saved; just click the **Save** button to update the saved report after you've made changes.

You now have a complete ad-hoc report in the format or formats you specified.

Creating An Analysis View

How to create an analysis view in the Pentaho User Console.

In order to create an analysis view, you must already have a Pentaho Analysis schema and cube. If you do not already have these items, you can create them by using the Pentaho Schema Workbench. The BI Suite Community Edition comes with sample data and solutions that include an analysis cube and schema for the fictional Steel Wheels product database.

To create a new anlysis view using an existing Pentaho Analysis cube, follow this process.

1. In the **File** menu, select the **New** sub-menu, then click **New Analysis View...**.

   This is one of several ways to create a new analysis view; all methods lead to the same screen in the Pentaho User Console.
2. Select the appropriate schema and cube from the drop-down lists.
3. Click **OK** to continue.

An analysis view will open in a new tab.

Contacting Pentaho

How to improve this document.

If you have questions that are not covered in this guide, or if you find errors in the instructions or language, please contact the Pentaho Technical Publications team at documentation@pentaho.com. **The Publications team cannot help you resolve technical issues with products.**

Support-related questions should be submitted through the Pentaho Customer Support Portal at http://support.pentaho.com .

For information about how to purchase support or enable an additional named support contact with an existing subscription, please contact your sales representative, or send an email to sales@pentaho.com.

For information about instructor-led training on the topics covered in this guide, visit http://www.pentaho.com/training .

Company Information

Contact and corporate information.

Pentaho's physical and mailing address is:

```
Pentaho Corporation
Citadel International, Suite 340
5950 Hazeltine National Drive
Orlando, FL 32822
```

Phone: +1 407 812-OPEN (6736)

Fax: +1 407 517-4575

Web site: http://www.pentaho.com

Sales Inquiries: sales@pentaho.com

Support: support@pentaho.com

Documentation Suggestions: documentation@pentaho.com

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