



Pentaho Mobile Guide



This document supports Pentaho Business Analytics Suite 4.8 GA and Pentaho Data Integration 4.4 GA, documentation revision October 31, 2012.

This document is copyright © 2012 Pentaho Corporation. No part may be reprinted without written permission from Pentaho Corporation. All trademarks are the property of their respective owners.

Help and Support Resources

If you have questions that are not covered in this guide, or if you would like to report errors in the documentation, please contact your Pentaho technical support representative.

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, 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>.

Limits of Liability and Disclaimer of Warranty

The author(s) of this document have used their best efforts in preparing the content and the programs contained in it. These efforts include the development, research, and testing of the theories and programs to determine their effectiveness. The author and publisher make no warranty of any kind, express or implied, with regard to these programs or the documentation contained in this book.

The author(s) and Pentaho shall not be liable in the event of incidental or consequential damages in connection with, or arising out of, the furnishing, performance, or use of the programs, associated instructions, and/or claims.

Trademarks

Pentaho (TM) and the Pentaho logo are registered trademarks of Pentaho Corporation. All other trademarks are the property of their respective owners. Trademarked names may appear throughout this document. Rather than list the names and entities that own the trademarks or insert a trademark symbol with each mention of the trademarked name, Pentaho states that it is using the names for editorial purposes only and to the benefit of the trademark owner, with no intention of infringing upon that trademark.

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

Documentation Suggestions: documentation@pentaho.com

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

Contents

- Using Pentaho Mobile.....4
 - Setting Up Mobile Access.....4
 - Getting Started with Pentaho Mobile.....4
 - Creating a Shortcut Using Safari.....4
 - Working with the Home Screen.....4
 - Navigating Files.....6
 - Creating and Removing Favorites.....6
 - Settings.....6
 - Working with Pentaho Mobile Tools.....7
 - Using the Overlay Toolbar.....7
 - Mobile Reports.....7
 - Mobile Analyzer.....8
 - Mobile Dashboards.....8

Using Pentaho Mobile

Get immediate access to powerful business analysis at any time with Pentaho Mobile, an innovative application built specifically for the Apple iPad. Touch navigation technology enables you to access content with the tap of a finger.

Setting Up Mobile Access

To get access to Pentaho Mobile, you must

1. Ensure that an administrator installs the Pentaho Mobile license key along with the Pentaho license keys for Pentaho Business Analytics Enterprise Edition. See the *Pentaho Business Analytics Administrator's Guide* for more information.
2. Have an Internet connection
3. Obtain the Pentaho server IP address or host name from your administrator and enter it into the iPad Safari web browser. For example, `http://<hostname>:8080`.


Getting Started with Pentaho Mobile

Once you have access to Pentaho Mobile, log in with the same user name and password you use for the Pentaho User Console. Logging in enables you to view and create reports. If you have permission, you can also edit Pentaho Analyzer reports.

After accessing Pentaho Mobile, a dialog box appears. If you choose to toggle **Yes** for the **Remember me on this device** prompt, the prompt does not appear the next time you access Pentaho Mobile from that iPad. You can change this by going to **Settings**.

Creating a Shortcut Using Safari

When you view Pentaho Mobile in the Safari browser, the browser toolbars take up some of the viewing area. To obtain the maximum viewing area and to launch Pentaho Mobile from your iPad Home screen, create a shortcut.

1. Open Pentaho Mobile.
2. Tap the **Share**  button.
3. Tap **Add to Home Screen**.
4. Type in an alternate name, or keep the name **PentahoMobile**, and tap the **Add** button.
A shortcut appears on the iPad Home screen. The next time you launch from the shortcut, you will have a maximized viewing area.

Working with the Home Screen

Before you start using Pentaho Mobile, take a quick tour of the interface and basic navigation.



The **Home** screen is divided into three panels.

Recent	This panel displays a list of the last ten files you have opened with Pentaho Mobile and the Pentaho User Console. You can change the maximum number of file names that appear by going to Settings .
Favorites	This panel displays a list of the files marked as favorites.
Opened Files	This panel displays a list of files that are currently open.

Using the buttons on the Home screen, you can navigate to and select files that contain the content you want to view. You can also perform other actions.


Browse Files	Browse files saved on the Pentaho Analysis Server.
Create New Content	Create a new Pentaho Analyzer report.
Startup Screen	Open the file you have selected to load when Pentaho Mobile launches. If you want to edit this selection, tap Settings .
Settings	Specify options for configuring Pentaho Mobile.
Refresh All	Refresh the Recents , Favorites , and Open Files lists.
Help	Access the Pentaho Mobile documentation.

There are three buttons at the bottom of the screen.

Home	Instantly navigate to the Home screen.
New	This button displays if you have permission to create new Analyzer reports.
Open	View a list of open files. The number of open files appears as a badge on the icon. You can also use this button to close files by tapping the X that is located after the file name. If no files are open, the Browse option appears so you can select a file to open.

Navigating Files

Browsing Files

To select a file and load its viewable content, tap the **Browse Files**  button. Then tap either **All**, **Favorites**, or **Recent** and select the file that has the content you want to view. The file loads in your screen.

Moving Between Files

If you have several files open, you can navigate between them by tapping **Open** at the bottom of the screen. All of the open files appear and you can select the one you want to view.

Closing Files

To close a file, tap the **X** in the **Open Files** list.

Creating and Removing Favorites

Marking a file as a favorite makes it easier to find. Favorites appear on the **Home** screen and in the **Favorites** tab when you tap on **Browse**.

Creating Favorites

To mark a file as a favorite, tap the star. The star turns yellow, indicating it is a favorite.

Removing Favorites

To remove the favorite status from a file, tap the yellow star. The star is no longer yellow, indicating that the file is not a favorite.

Settings

If you want to change your settings, tap the **Settings**  button. You will find these options while in **Settings**.

Startup Screen

Change the **Startup Screen** to load with a file instead of the default **Home** screen. To load a file on startup, tap **Select a file**, navigate to the correct file, and select it. The selected file appears in the **Startup Screen** list with a highlighted option button. If you want to make the Pentaho **Home** screen the startup screen again, tap the **Pentaho Default Home** option button.

Recent Files

To change the number of recent files tap the plus or minus next to **Keep The Last**. You can also tap **Clear All Recent Files**.

Clearing Favorites and Settings

To clear favorites and settings for Pentaho Mobile:

- Tap **Clear All Favorites** to clear your favorites list.
- Tap **Reset All Settings** to reset all of your settings, including local storage, such as saved password settings and dialog preferences. **Reset All Settings** also clears the **Recents** list in the Pentaho User Console.

Help

This content appears when you tap **Help**.

Pentaho Mobile Information

Tap **About Pentaho Mobile** for product information, such as version number.

Password Protection

To specify whether or not your password is saved, tap **Remember me on this device** and toggle the switch to **Yes** or **No**. You will automatically be signed in when you start Pentaho Mobile.

Logout

Tap **Logout** to end your session of Pentaho Mobile.

Working with Pentaho Mobile Tools

You can view previously created files using Pentaho Mobile. You may feel familiar with the experience of Pentaho Mobile if you have used the Pentaho User Console. If you have not used the Pentaho User Console, you can view the *Pentaho User Console Guide* to familiarize yourself with its capabilities. The *Pentaho User Console Guide* is available on the [Pentaho InfoCenter](#), which is best viewed from your desktop web browser.

Pentaho Mobile responds to the standard iOS device gestures and changes in orientation.

Using the Overlay Toolbar

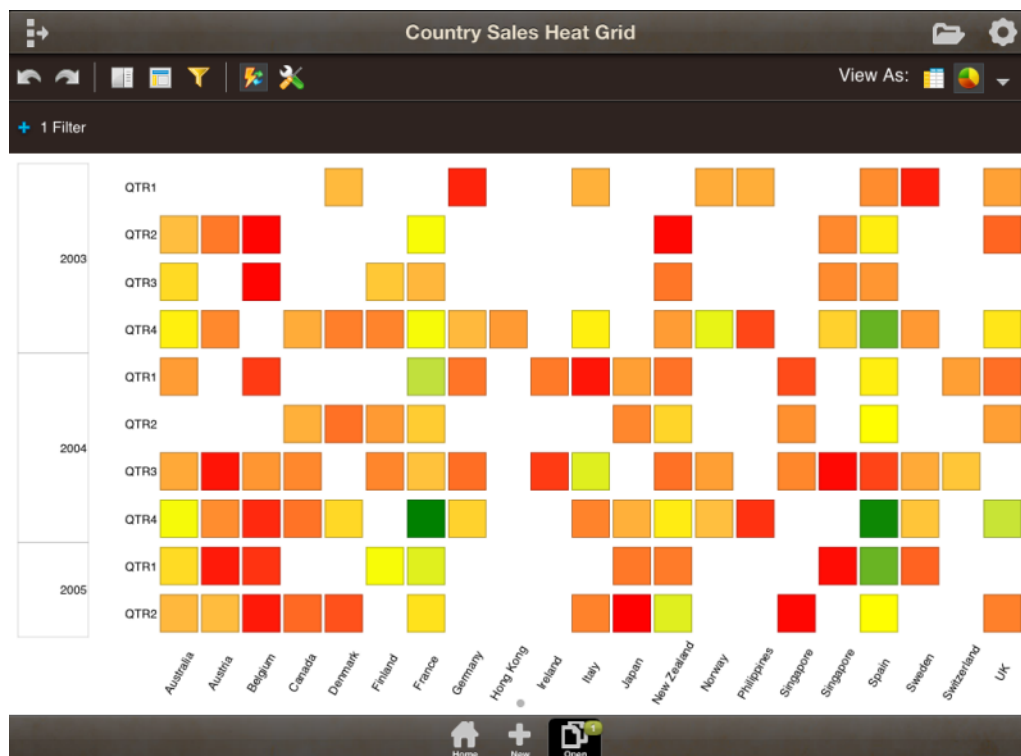
The Overlay Toolbar is a content-driven toolbar that allows you to easily perform common actions. For all content, you can tap **Overlay Toolbar** to create **Favorites**, **Refresh** content, or **Close** content. For Analyzer Reports, you can also **Save** and **Save As** if your administrator has given you permission.

Mobile Reports

Steel Wheels, Inc.		
Income Statement		
From June 1 through June 30, 2005		
Revenue		
Direct Sales	400,000	
Channel Sales	150,000	
Total Revenue		\$ 550,000
Beginning inventory	40,000	
Net purchases	325,000	
Ending inventory	35,000	
Gross Margin		\$ 330,000
Cost of goods sold		\$ 220,000
Expenses		
Selling expenses		
Sales salaries	48,000	
Nonrecurring item	12,000	
Other	13,000	
Total Selling expenses		73,000
General and administrative expenses		
Office salaries	27,100	
Depreciation	5,500	
Amortization	3,200	
Bad debt	4,500	
Other	24,200	
Total General and administrative expenses		64,500

You can view reports that were created with the desktop version of Pentaho Interactive Reporting or Pentaho Report Designer. If you need more information, see the *Pentaho User Console Guide* and the *Pentaho Report Designer User Guide*.

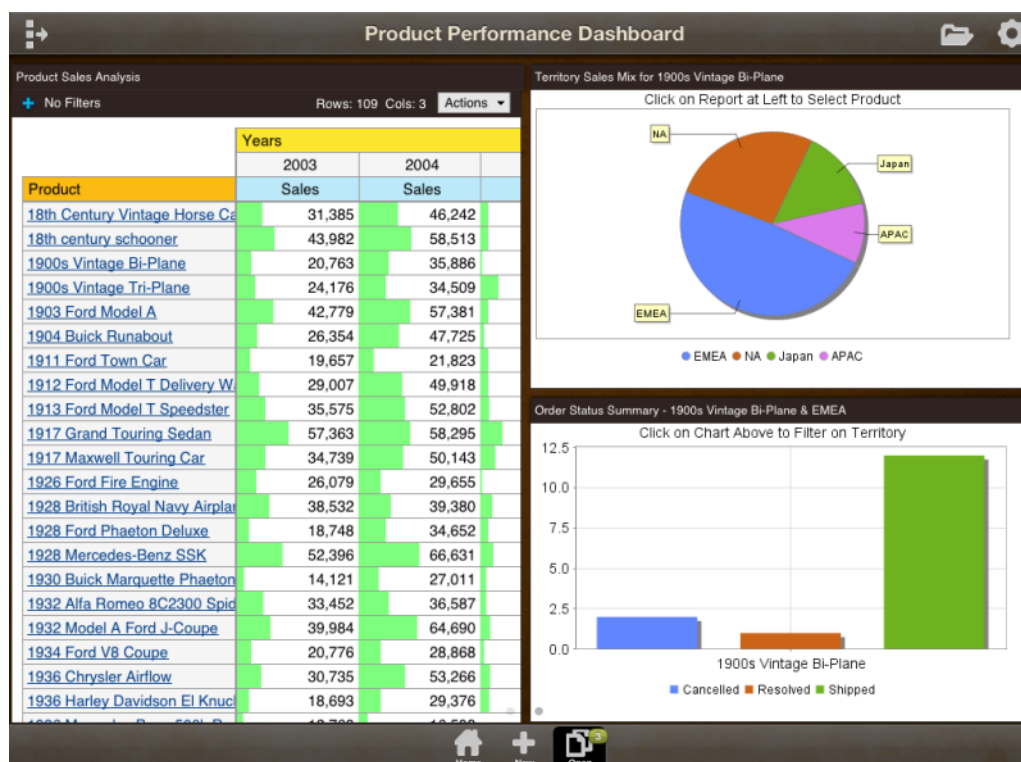
Mobile Analyzer



You can view and edit Pentaho Analyzer reports using Pentaho Mobile. Previously created content opens in view mode, with the design panels closed. If you would like to edit a report, you can use the icons on the toolbar to access the design panels.

If you need more information about how to view and edit Pentaho Analyzer Reports, see the *Pentaho User Console Guide*.

Mobile Dashboards



You can view dashboards created with the Pentaho User Console Dashboard Designer. You may want to optimize your dashboards for the mobile environment by selecting layout templates that are better for smaller screen sizes and avoiding Flash charts since the iPad does not support Flash. If you choose to view a Flash chart on Pentaho Mobile, it converts to a static image.

If you need more information about how to create Pentaho Dashboards, see the *Pentaho User Console Guide*.