



Choose Your Workflows



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Introducing Workflows

Introduction to workflows TBD.

[The following verbiage is a placeholder to indicate a possible direction for the intro...]

Now that you understand Pentaho *components*, you are ready to learn, to play, to grow.

- Learn what you can do with Pentaho components by getting *hands-on experience*.
- Play with your own data to *develop proofs-of-concept*.
- Grow your experience into *production solutions* for your Business Intelligence (BI) needs.

Next Steps

[Placeholder - Compel reader to evaluate components.]

Evaluate Components

As you review Pentaho [components](#), you probably are intrigued by several tools that seem perfect for your immediate needs. Indeed, the Business Analytics suite includes a comprehensive toolset. However, we recommend you start by learning the basics.

- Try [Business Analytics](#) (BA) components to analyze data, create quick reports, and design print-quality reports.
- Experiment with [Data Integration](#) (DI) components to build or refine a data mart, and analyze data.

If you have not reviewed the hosted demo on the Pentaho website, take a minute to [Try Pentaho Now](#). After completing this demo, you will understand what Pentaho Business Analytics is and what it can do for you.

Evaluate BA

After you [install Pentaho](#) Business Analytics suite, decide whether you want to do [quick analysis and reporting](#), or focus on [print-quality reports](#).

Use This Tool	For These Results
User Console	<ul style="list-style-type: none"> • Create quick reports with Interactive Reports. • Compile, sort, filter, and visualize data through Pentaho Analyzer. • Customize simultaneous views of multiple reports, charts, visualizations, and web pages by using Dashboard Designer. • Change days or times that reports are scheduled to run through the User Console.
Report Designer	<ul style="list-style-type: none"> • Create and refine highly detailed, print-quality reports. • Add charts and parameters to reports. • Use advanced report design options, including calculations. • Generate templates for Report Design Wizard and Interactive Reports. • Publish reports to the BA Server.

Install and Configure BA Server and Tools

These instructions describe how to install Business Analytics (BA), and configure the BA Server and tools.

1. Download [Pentaho Business Analytics](#) trial software.
2. Double-click the file you downloaded to launch the Installation Wizard.
3. Follow the [Installation Wizard instructions](#) on Pentaho InfoCenter to install BA on a single machine.
4. [Configure the BA Server](#) to make sure there are no surprises.
5. Ready to learn more? Drive your own evaluation experience by exploring [User Console](#) and [Report Designer](#).

Consider which approach is right for you as you notice differences between reports you generate with each tool.

Review Quick Analysis Reports

If you want to create, display and schedule business analytics reports, evaluate the User Console.

1. Start by touring the User Console.
2. [Examine](#) sample reports, then [create](#) your own.
3. Build dashboards so you can quickly review reports, web pages, and other analysis content.
4. After you learn to create reports, discover how to [schedule](#) them.

Create Print-Quality Reports

When you want to create highly detailed, production-quality reports, check out [Report Designer](#).

1. [Start](#) Report Designer.

2. [Create](#) your first print-quality report.
3. [Add a chart](#) to your report.
4. Insert some [parameters](#).
5. After you master these basics, experiment with some advanced options.
 - [Add](#), [align](#), and [format](#) report elements.
 - Create traditional and sparkline [charts](#).
 - Create report [templates](#).
 - [Publish](#) reports to the BA Server.
6. If you want to [refine reports](#), keep reading about [row banding](#), [data formatting](#), and [alignment](#).

Next Steps

If you are interested in system administration tasks, glance at instructions about [maintaining the BA Server](#).

Learn More

- Now that you have played with BA, you are ready to [discover DI](#), or use BA to [develop a proof-of-concept](#) solution.

Evaluate DI

Use Data Integration (DI) tools to access and extract data, then transform it to support business analytics. We provide a [quick start](#) method for building data marts, then analyzing your results. If you prefer a more technical approach, use [agile development](#) procedures to refine your data mart or warehouse.

Use These Tools	For These Results
Instaview and Analyzer	<ul style="list-style-type: none"> • Explore different ways to structure and present your data. • Correct data quality issues to ensure reliable reporting. • Add filters to restrict or limit data in reports. • Create visualizations to support business decisions. • Use conditional formatting to contrast data.
Spoon and Agile BI	<ul style="list-style-type: none"> • Create transformations and jobs. • Schedule jobs. • Use Agile BI for accelerated development. • Use PDI and Hadoop to work with big data.

Data Mart Quick Start

If you want to create a data mart quickly, test [Instaview's](#) template mode, then visualize your data with Analyzer.

1. [Start](#) Instaview, then figure out how to [navigate](#) the interface.
2. [Connect](#) to data sources.
3. [Create](#) an Analyzer report.
4. [Correct](#) data quality issues.
5. [Customize](#) some visualizations.
6. If you want to do more exploring, [investigate](#) a few advanced tips.

Refine Your Data Mart

You can enhance your data mart or data models in the DI design tool, Spoon, and use an iterative development plan with business partners to enrich your analytics.

1. [Start](#) the DI server.
2. Connect to the data repository.
3. [Login](#) to Spoon, then [learn](#) to navigate.

4. Create *transformations* and *jobs*.
5. *Build* BI solutions with Agile BI.
6. Consider *using big data sources*, such as Hadoop, to expand your experience.

Next Steps

Scrutinize a list of features your system administrator can perform to *maintain* the DI Server.

Learn More

- After you complete this evaluation, you are ready to use DI to *develop a proof-of-concept* solution.

Develop Solution Concepts

This document describes how to use Pentaho *Business Analytics* (BA) and *Data Integration* (DI) components to develop proofs of concept that lead to business intelligence solutions.

Develop BA Solutions

This document describes how to use Business Analytics (BA) components to develop proofs of concept that lead to business intelligence solutions.

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Intro text

Develop DI Solutions

This document describes how to use Data Integration (DI) components to develop proofs of concept that lead to business intelligence solutions.

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Intro text

Design Production Solutions

This document describes how to use Pentaho *Business Analytics* (BA) and *Data Integration* (DI) components to design business intelligence solutions you can move to a production environment.

Design BA Production

This document describes how to use Business Analytics (BA) components to design business intelligence solutions you can move to a production environment.

Heading

Intro text

Design DI Production

This document describes how to use Data Integration (DI) components to design business intelligence solutions you can move to a production environment.

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