



Learn About Analysis, Interactive
Reports, and Dashboards



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Contents

Introduction.....	4
Get Started with Pentaho Reporting Tools.....	5
Tour the Pentaho User Console.....	6
Login to the User Console.....	6
Home.....	6
Browse Files.....	7
Opened.....	8
Schedules.....	9
Use Pentaho Tools.....	9
Get Started with Interactive Reports.....	11
Interactive Report Sample - Vendor Sales Report.....	11
Tour the Interactive Panels.....	12
Create Your First Interactive Report.....	13
Get Started with Analyzer Reports.....	16
Analyzer Report Sample - Top Five Product Lines by Territory.....	16
Tour the Analyzer Panels.....	17
Create Your First Analyzer Report.....	18
Get Started with Dashboard Designer.....	22
Dashboard Sample - Sales KPI Dashboard.....	22
Tour the Dashboard Panels.....	23
Create Your First Dashboard.....	24
Next Steps.....	26

Introduction

After you have successfully installed the Pentaho software and configured the BA Server, you are ready to explore the **User Console**. This console serves as the conduit that connects elements of Analysis and Reporting with the BA repository to provide you with tools for creating and sharing reports and dashboards.

The topics found in this section give you an overview of the reports and dashboards you create with the **User Console**, to help you become 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 topics in this section give you an overview on how to use the **User Console** to create and customize reports and dashboards for your business needs.

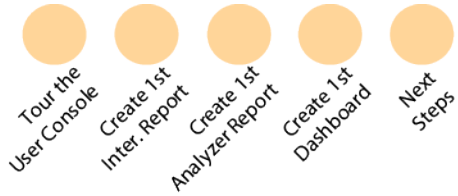
Tools

We provide a web application, the **User Console**, which you use to create reports and dashboards.

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 solutions.

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](#)

Tour the Pentaho User Console



The **User Console** is designed to be intuitive to users who are familiar with common file managers like Windows Explorer, and Web browsers like Firefox.

These sections take you on a brief tour of the Pentaho User Console pages, showing you controls and the different things that you can do on each page.

- [Login to the User Console](#)
- [Home](#)
- [Browse Files](#)
- [Opened](#)
- [Schedules](#)
- [Use Pentaho Tools](#)

Login to the User Console

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

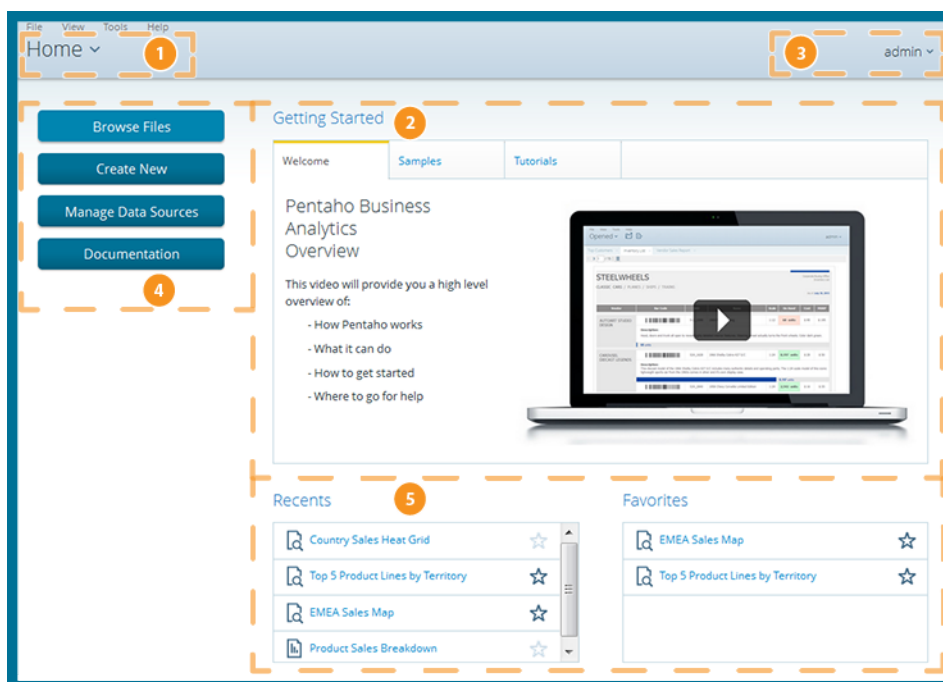
1. Launch a Web browser and enter the URL of the Pentaho server.
The page loads an introductory screen with a **Login** section.
2. Click to expand the menu to **Login as an Evaluator**.
3. You can choose to login as an **Administrator** or a **Business User**. Click **GO** to login.

You are now logged into the **User Console** and ready to explore.



Home

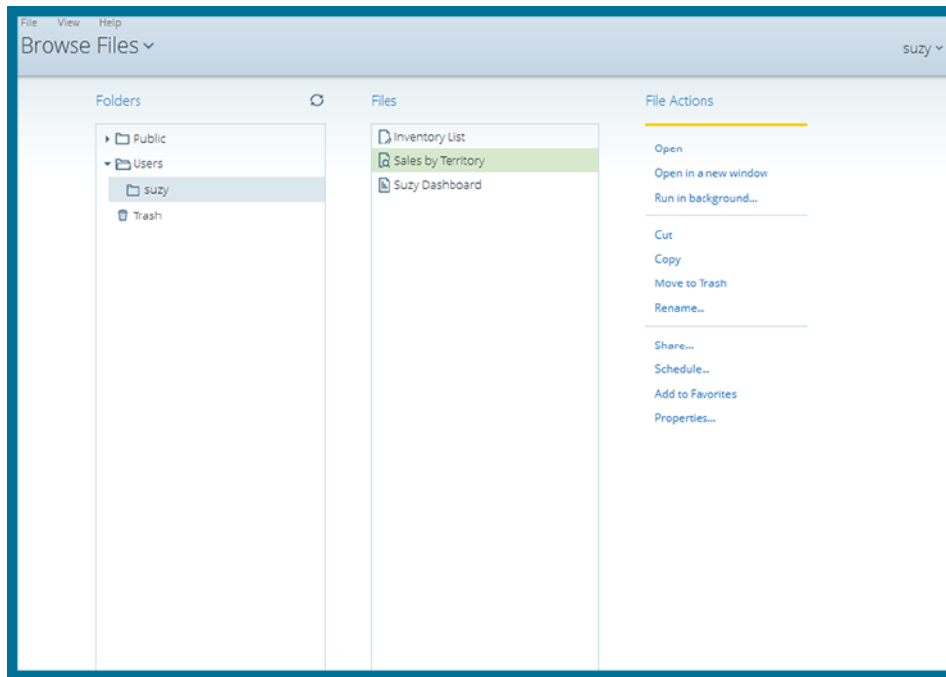
The first thing you see after you login to the console is the **Home** page, which serves as the starting place for the **User Console** and all of the tasks that you do with it.



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	Displays some resources to help you get familiar with the User Console. The Welcome tab shows an introductory video about Pentaho products. The Samples tab holds a variety of small sample reports and dashboards that you can use to get familiar with the software. The Tutorials tab contains a number of tutorial videos that give you a visual guide to the software.
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.
	Create New	Gives you choices to create a new Analysis report, Interactive report, or Dashboard.
	Manage Data Sources	Gives an administrator access to the Data Sources Wizard . This button does not appear if you are not logged in with an administrator role.
	Documentation	Leads you to the Pentaho InfoCenter , which contains the documentation for Pentaho products. The Infocenter opens in a new window or tab.
5	Recents and 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. If this is your first time using the console, these two windows will be empty.

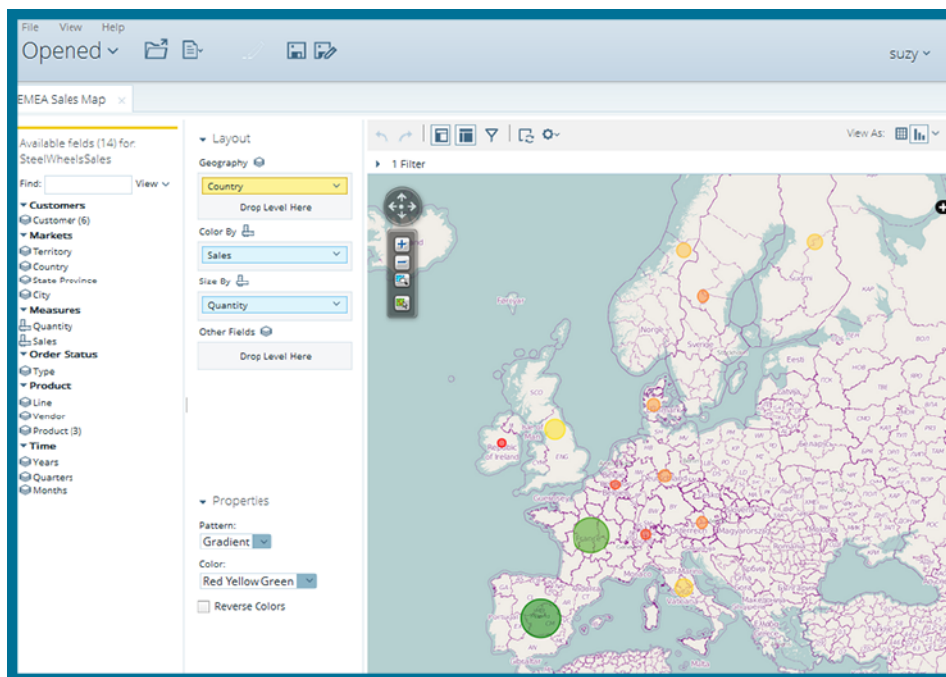
Browse Files

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 file selected.

The list of schedules shows which files 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.

The screenshot shows the 'Schedules' page in the Pentaho User Console. At the top, there's a navigation bar with 'File', 'View', and 'Help' menus, and a 'Schedules' dropdown. Below this is a section titled 'My Schedules' with a toolbar containing icons for refresh, add, edit, and delete. The main content is a table with the following data:

Schedule Name	Repeats	Source File	Output Location	Last Run	Next Run	Status
EMEA Sales Map	The first Sunday of every month at 01:00:00	/public/pentaho-solutions/analysis/EMEA Sales Map	/home/suzy	-	2013 Sep 1 01:00:00	NORMAL
Top 5 Product Lines by Territory	Every Monday at 01:00:00	/public/pentaho-solutions/analysis/Top 5 Product Lines by Territory	/home/suzy	-	2013 Aug 19 01:00:00	NORMAL

Below the table is a section titled 'Blockout Times' with the text 'All schedules will be blocked out during the following times:'. It contains a table with the following data:

Starts	Ends	Repeats	Repeats End By
Mon, Aug 12 1:00 AM	Sat, Aug 17 3:00 AM	Every Saturday at 01:00:00	Never

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.

Table 1: Pentaho Tools Decision Table

Explore Considerations	Choose Options		
	<i>Interactive Reports</i>	<i>Analyzer Reports</i>	<i>Dashboard Designer</i>
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	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	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

Explore Considerations	Choose Options		
	<i>Interactive Reports</i>	<i>Analyzer Reports</i>	<i>Dashboard Designer</i>
	formatting elements such as fonts, column width or sorting, background colors, and more.	visualizations that include detailed stop-lighting.	within a space while you create reports in another.

Get Started with Interactive 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.

- [Interactive Report Sample - Vendor Sales Report](#)
- [Tour the Interactive Panels](#)
- [Create Your First Interactive Report](#)

Interactive Report Sample - Vendor Sales Report

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

1. In the **Getting Started** widget on the **Home** page, click the **Samples** tab.
2. Click to select **Vendor Sales** from the bottom of the widget.
3. Click **View** in the **Samples** pane.

The screenshot shows the Pentaho Interactive Reports interface. At the top, there's a navigation bar with 'Welcome', 'Samples', and 'Tutorials' tabs. Below this is a toolbar with various icons for report manipulation. The main content area displays two tables of data.

Territory: APAC
Product Vendor: Autoart Studio Design

Product Name	Scale	Items Sold	Sales
1900s Vintage Bi-Plane	1:24	114	\$6,919
1932 Model A Ford J-Coupe	1:18	255	\$28,145
1937 Horch 930V Limousine	1:24	77	\$6,557
1962 Volkswagen Microbus	1:24	108	\$14,270
1968 Ford Mustang	1:12	125	\$21,111
1997 BMW R 1100 S	1:24	183	\$18,981
2002 Yamaha Y2R M1	1:50	128	\$10,343
The Schooner Bluenose	1:700	32	\$3,230
			\$109,556

Product Vendor: Carousel DieCast Legends

Product Name	Scale	Items Sold	Sales
18th century schooner	1:24	31	\$3,684
1913 Ford Model T Speedster	1:18	278	\$28,517
1926 Ford Fire Engine	1:18	181	\$14,284
1940 Ford Delivery Sedan	1:24	53	\$4,707
1958 Chevy Corvette Limited Edition	1:24	31	\$1,030
1966 Shelby Cobra 427 S/C	1:24	166	\$9,453
1982 Camaro Z28	1:18	98	\$8,923
Collectable Wooden Train	1:18	58	\$5,513
The Titanic	1:700	35	\$2,302

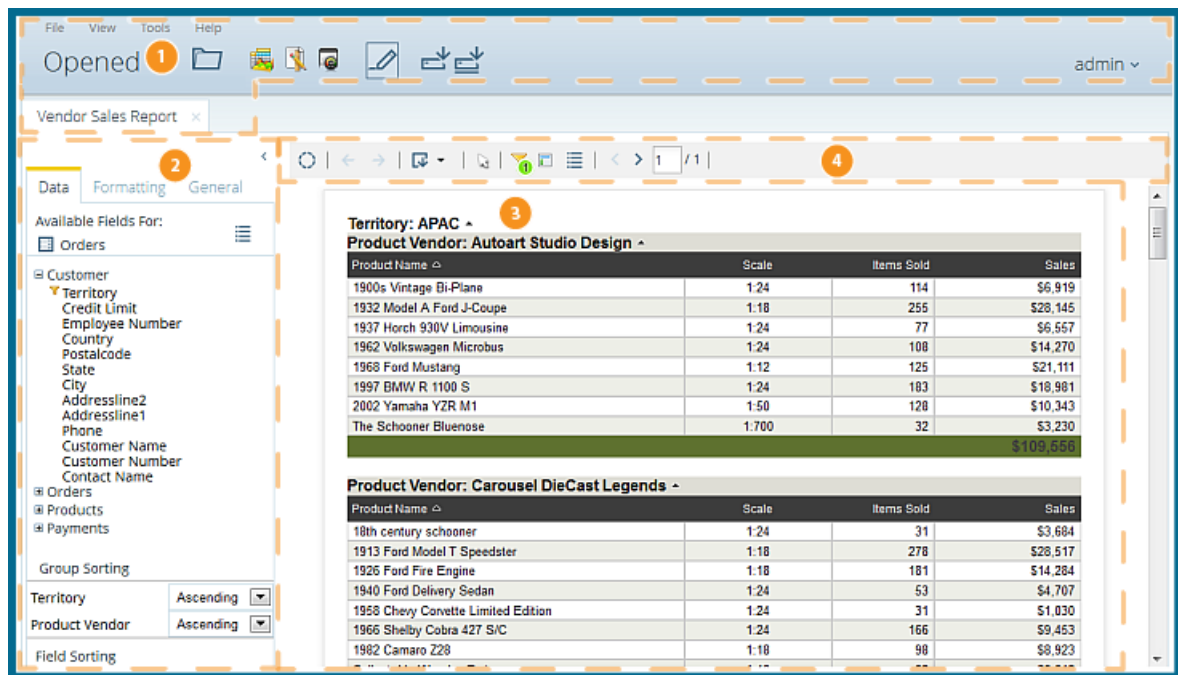
At the bottom of the interface, there's a row of icons representing different report types: 'Top 5 Product Lines By Territory', 'EMEA Sales Map', 'Country Sales Heat Grid', 'Vendor Sales Report' (which is highlighted), 'Inventory List', 'Top N Customers', 'Regional Sales Performance', and 'Sales KPI Dashboard'.

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](#) 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 Pentaho Solution Browser and **Steel Wheels** folders. Click to highlight the **Reporting** folder.
2. In the center pane, double-click on **Vendor Sales**. The **Opened** page appears with the Analysis report and panels 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	<p>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.</p> <p>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 Panel.</p> <p>The Formatting panel allows you to change the font size and type on the opened report.</p> <p>The General panel allows you to set preferences, select a paper size for printing, and select from a variety of templates for your report.</p>
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	<p>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.</p> <p>Use the Filters panel to display a list of filters applied to the active report, or edit or delete filters.</p>

Create Your First Interactive Report

Follow the instructions below to create an Interactive report with the Steel Wheels sample data.

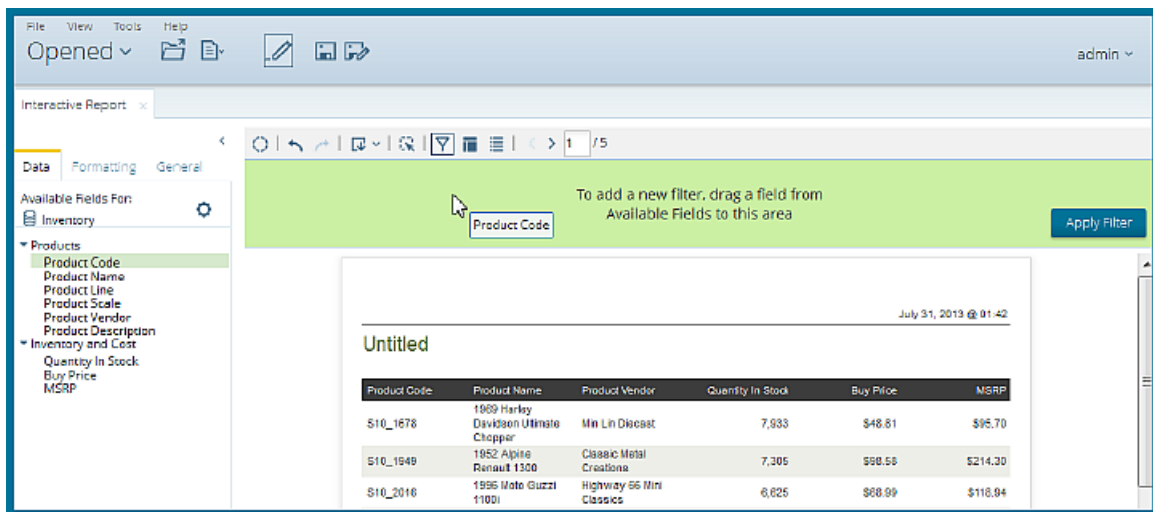
1. From the User Console **Home** page, click **Create New**, then choose **Interactive Report**.
2. Choose the **Inventory** data source from the **Select Data Source** dialog box. Click **OK**.
A blank Interactive report appears.
3. Click and drag the **Product Code** element onto the Report Canvas until a highlighted vertical line appears. Drop it onto the Report Canvas and continue dragging and dropping these fields onto the canvas: **Product Name**, **Product Vendor**, **Quantity in Stock**, **Buy Price**, and **MSRP**.

The screenshot shows the 'Interactive Report' application window. On the left, the 'Available Fields For: Inventory' panel lists fields under 'Products' and 'Inventory and Cost'. The 'Report Canvas' displays a table titled 'Untitled' with the following data:

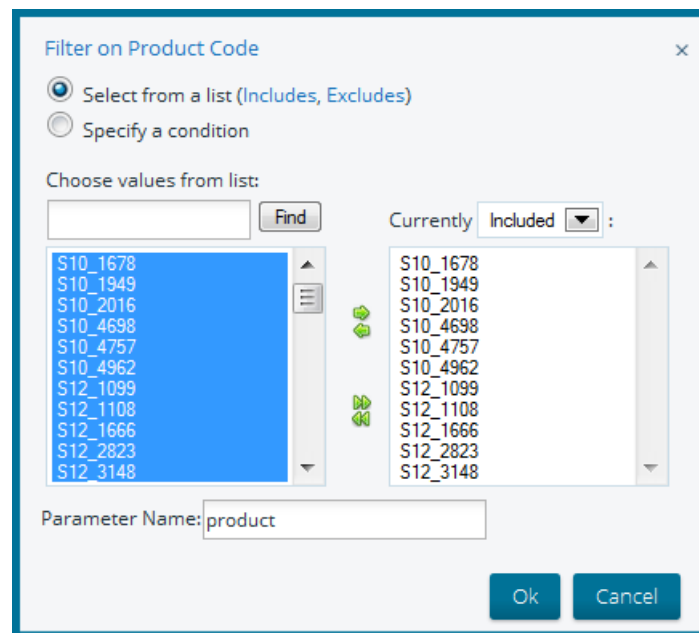
Product Code	Product Name	Product Vendor	Buy Price	MSRP
S10_1678	1959 Harley Davidson Ultimate Chopper	Min Lin Diecast	\$48.81	\$95.70
S10_1949	1952 Alpine Renault 1300	Classic Metal Creations	\$98.58	\$214.30
S10_2016	1908 Moto Guzzi 1100i	Highway 99 Mini Classics	\$68.99	\$118.94
S10_4698	2003 Harley-Davidson Eagle Drag Bike	Red Start Diecast	\$91.02	\$193.66
S10_4757	1972 Alfa Romeo GTA	Motor City Art Classics	\$85.68	\$136.00
S10_4902	1962 Lancia Delta 16V	Second Gear Diecast	\$103.42	\$147.74
S12_1099	1968 Ford Mustang	Autoart Studio Design	\$194.57	\$194.57
S12_1108	2001 Ferrari Enzo	Second Gear Diecast	\$95.59	\$207.00
S12_1806	1950 Setra Bus	Welly Diecast Productions	\$77.90	\$136.67
S12_2823	2002 Suzuki XREO	Unimax Art Galleries	\$66.27	\$150.62
S12_3148	1968 Corvair Monza	Welly Diecast Productions	\$89.14	\$151.08
S12_3380	1988 Dodge Charger	Welly Diecast Productions	\$75.16	\$117.44
S12_3891	1969 Ford Falcon	Second Gear Diecast	\$83.95	\$173.02
S12_3990	1970 Plymouth Hemi Cuda	Studio II Art Models	\$21.92	\$79.00
S12_4473	1957 Chevy Pickup	Exoto Designs	\$55.70	\$118.50
S12_4875	1969 Dodge Charger	Welly Diecast Productions	\$58.73	\$115.16

The data from the chosen fields appears on the **Report Canvas** and populates with the information from the server. 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 desired order.

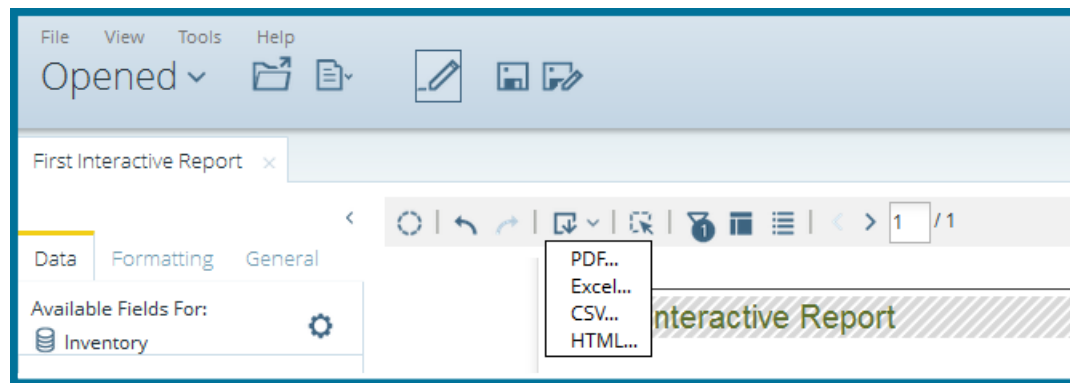
4. After you have arranged your columns in the order that you want, apply a filter to the data by clicking on the **Filter** icon in the toolbar. After the filter pane expands, drag the Product Code field onto the filter pane.



5. Select **Product Code** from the **Available Fields** list on the left and drag and drop it onto the Filter canvas. Choose more than one item from the Filter dialog box by holding down the Shift key and clicking on the first item in the list, **S10_1678**, then clicking on item **S12_3148**, then clicking the top, right-pointing arrow.



6. Type **product** as your parameter name in the text box. Click **OK**, then click **Apply Filter** on the Filter canvas.
7. Rename your report by double-clicking on **Untitled** in the **Report Canvas**, and typing the name **First Interactive Report** in the field that appears.
8. Click the **Save As** button in the toolbar. When the **Save As** dialog box appears, save your report as **First Interactive Report**, under `public/pentaho-solutions/steel-wheels/reports` and click **Save**.
9. If you want to export the report, click the **Export** icon on the toolbar and chose a format for the export.



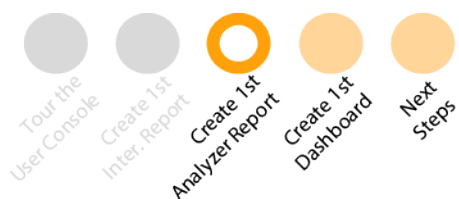
The report exports into the selected format and a paper copy can be printed from the export.

The screenshot shows the 'First Interactive Report' displayed in a browser window. The report title is 'First Interactive Report' and the date is 'July 15, 2013 @ 02:59'. The table contains the following data:

Product Code	Product Name	Product Vendor	Quantity In Stock	MSRP	Buy Price
S10_1678	1969 Harley Davidson Ultimate Chopper	Min Lin Diecast	7,933	\$95.70	\$48.81
S10_1949	1952 Alpine Renault 1300	Classic Metal Creations	7,305	\$214.30	\$98.58
S10_2016	1996 Moto Guzzi 1100i	Highway 66 Mini Classics	6,625	\$118.94	\$68.99
S10_4698	2003 Harley-Davidson Eagle Drag Bike	Red Start Diecast	5,582	\$193.66	\$91.02
S10_4757	1972 Alfa Romeo GTA	Motor City Art Classics	3,252	\$136.00	\$85.68
S10_4962	1962 Lancia Delta 16V	Second Gear Diecast	6,791	\$147.74	\$103.42
S12_1099	1968 Ford Mustang	Autoart Studio Design	68	\$194.57	\$95.34
S12_1108	2001 Ferrari Enzo	Second Gear Diecast	3,619	\$207.80	\$95.59
S12_1666	1968 Setra Bus	Welly Diecast Productions	1,579	\$136.67	\$77.90
S12_2823	2002 Suzuki XREO	Unimax Art Galleries	9,997	\$150.62	\$66.27
S12_3148	1969 Corvair Monza	Welly Diecast Productions	6,906	\$151.08	\$89.14

You have successfully created a simple Interactive report from scratch. [Use Interactive Reports](#) shows you how to work with 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.

- [Analyzer Report Sample - Top Five Product Lines by Territory](#)
- [Tour the Analyzer Panels](#)
- [Create Your First Analyzer Report](#)

Analyzer Report Sample - Top Five Product Lines by Territory

This section highlights some popular **Analyzer** capabilities that are available, using the sample report called *Top 5 Product Lines by Territory* report located in the Getting Started widget.

1. In the **Getting Started** widget on the **Home** page, click the **Samples** tab.
2. Click to select **Top 5 Product Lines By Territory** from the bottom of the widget.
3. Click **View** in the **Samples** pane.

pentaho

Welcome Samples Tutorials

+ 1 Filter Rows: 20 Cols: 9 Actions

		Years								
		2003			2004			2005		
Territory	Line	Sales	Quantity	Unit Sales	Sales	Quantity	Unit Sales	Sales	Quantity	Unit Sales
APAC	Classic Cars	\$115,011	1,052	\$109	\$199,372	1,785	\$112	\$97,574	1,215	\$96
	Vintage Cars	\$111,639	1,243	\$90	\$147,212	1,587	\$93	\$105,688	1,267	\$99
	Motorcycles	\$60,789	654	\$93	\$63,158	540	\$117	\$65,870	558	\$100
	Trucks and Buses	\$11,298	91	\$124	\$80,634	801	\$101	\$53,735	488	\$110
	Planes	\$42,663	456	\$94	\$67,681	723	\$94	\$11,082	151	\$73
APAC Total		\$341,400	3,496	\$98	\$558,057	5,436	\$103	\$333,948	3,379	\$99
EMEA	Classic Cars	\$691,273	5,853	\$118	\$1,015,790	8,976	\$113	\$384,538	3,463	\$111
	Vintage Cars	\$263,695	3,094	\$85	\$504,062	5,472	\$92	\$83,324	1,294	\$76
	Motorcycles	\$141,836	1,428	\$99	\$204,042	2,177	\$94	\$161,260	1,501	\$107
	Trucks and Buses	\$228,699	2,261	\$101	\$185,421	1,558	\$119	\$86,859	836	\$104
	Planes	\$154,519	1,723	\$90	\$209,128	2,326	\$90	\$128,008	1,464	\$87
EMEA Total		\$1,480,021	14,359	\$103	\$2,118,443	20,509	\$103	\$843,989	8,358	\$101
Japan	Classic Cars	\$120,696	898	\$134	\$42,071	307	\$137	\$18,835	122	\$154
	Planes	\$60,556	677	\$89	\$49,177	547	\$90	-	-	-
	Trucks and Buses	\$44,898	415	\$107	\$13,349	107	\$111	-	-	-
	Motorcycles	\$16,485	205	\$80	\$31,958	380	\$84	\$4,176	44	\$95
	Vintage Cars	\$22,888	308	\$74	\$21,470	229	\$84	\$7,979	84	\$95
Japan Total		\$265,123	2,503	\$106	\$158,025	1,565	\$101	\$30,990	250	\$124
NA	Classic Cars	\$587,428	4,959	\$118	\$581,048	5,017	\$116	\$237,791	2,105	\$113
	Vintage Cars	\$281,727	3,268	\$86	\$324,815	3,576	\$91	\$191,727	1,871	\$102
	Motorcycles	\$178,109	1,744	\$102	\$291,421	2,809	\$104	\$55,020	568	\$97

Top 5 Product Lines By Territory
 EMEA Sales Map
 Country Sales Heat Grid
 Vendor Sales Report
 Inventory List
 Top N Customers
 Regional Sales Performance
 Sales KPI Dashboard

A new window opens showing the **Top 5 Product Lines By Territory** sample report.

Tour the Analyzer Panels

You can view the editable version of **Top 5 Product Lines by Territory** 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. Click to highlight the **Analysis** folder.
2. In the center pane, double-click on **Top 5 Product Lines by Territory**. The **Opened** page appears with the Analysis report and panels 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	Available Fields and Layout panels	<p>Use the Available Fields and Layout panels to drag levels and measures into a report.</p> <p>Your report displays changes in the Report Canvas as you drag items onto the Layout panel.</p> <p>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.</p>
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.

Item	Name	Function
		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

Follow the instructions below to create an Analyzer report with 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.

The screenshot shows the Analyzer Report interface. On the left, the 'Available fields (14) for: SteelWheelsSales' are listed under categories: Customers (6), Markets (Territory, Country, State Province, City), Measures (Quantity, Sales), Order Status (Type), Product (Line, Vendor, Product (3)), and Time (Years, Quarters, Months). The 'Layout' section on the right shows 'Rows' with 'Territory', 'Columns' with 'Years', and 'Measures' with 'Sales'. The main canvas displays a pivot table with 'Territory' as rows and 'Years' as columns. The data is as follows:

Territory	Years		
	2003	2004	2005
APAC	343,082	601,606	337,018
EMEA	1,681,987	2,396,408	929,829
Japan	292,558	168,479	42,921
NA	1,359,757	1,821,247	671,057

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.

The screenshot shows the 'Top 5 Product Lines by Territory' report. The pivot table has 'Line' and 'Territory' in rows and 'Years' (2003, 2004, 2005) in columns. A context menu is open over the first 'Sales' column, with 'Show Subtotals' selected. The data table is as follows:

Line	Territory	Years		
		2003	2004	2005
Classic Car	Sales	115,011	199,372	97,574
		691,273	1,015,790	384,538
		120,696	42,071	18,835
		587,428	581,043	237,791
		60,789	63,159	65,870
Motorcycle	Sales	141,836	204,042	161,260
		16,485	31,959	4,176
		178,109	291,421	55,020
		42,663	67,681	11,082
		154,519	209,128	128,008
Planes	Sales	60,556	48,177	-
		90,016	202,942	60,985
		-	35,323	3,070
		172,428	186,992	67,845
		14,156	10,453	8,407
Ships	Sales	58,238	142,904	48,656
		1,681	8,226	-
		28,538	90,973	17,995
		13,279	-	3,524
		28,304	25,551	15,398
Trains	Sales	11,298	80,634	53,735
		228,699	185,421	86,859
		-	-	-
		-	-	-
		-	-	-
Trucks and Buses	Sales	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

- Right-click the first **Sales** column and select **Conditional Formatting** -> **Data Bar - Green** in the menu that appears.
- 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**.

New % of, Rank, Running Sum, etc.

Choose the measure field that you want to create:

☒ % of Sales
☐ Rank by Sales
☐ Running Sum of Sales
☐ % of Running Sum of Sales

- Select the radio button for **Each Line Column/Row Subtotal (Subtotal is 100%)**. Click **Done**.

New % of, Rank, Running Sum, etc.

Name: % of Sales

Format: Percentage (%) Decimal Places: 2

Base Measure: Sales

% of Sales

☐ Column (Grand Total Column is 100%)
☐ Row (Grand Total Row is 100%)
☐ Grand Total (Table Grand Total is 100%)
☒ Each Line Column/Row Subtotal (Subtotal is 100%)

Back Done Cancel

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**.

Filter on Territory

☒ Select from a list ([Includes](#) [Excludes](#))
☐ Match a specific string ([Contains](#) [Doesn't Contain](#))

Choose values from list: Find

Currently Included :

APAC
 EMEA
 Japan
 NA

>
 <
 >>
 <<

✓ APAC

Showing all 4 values

1 value selected

☒ region Parameter Name

OK Cancel

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.

The screenshot displays the 'Top 5 Product Lines by Territory' Analyzer Report. The interface includes a sidebar with 'Available fields (14) for: SteelWheelsSales' and a main report area. The report shows a table of sales data for 2003, 2004, and 2005, filtered by 'Territory includes APAC'. The table columns are Line, Territory, Sales, and % of Sales. The data is organized by product line (Classic Cars, Motorcycles, Planes, Ships, Trains) and includes totals for each category.

Line	Territory	2003		2004		2005	
		Sales	% of Sales	Sales	% of Sales	Sales	% of Sales
Classic Cars	APAC	115,011	100.00%	199,372	100.00%	97,574	100.00%
Classic Cars Total		115,011	100.00%	199,372	100.00%	97,574	100.00%
Motorcycles	APAC	60,789	100.00%	63,159	100.00%	65,870	100.00%
Motorcycles Total		60,789	100.00%	63,159	100.00%	65,870	100.00%
Planes	APAC	42,663	100.00%	67,681	100.00%	11,082	100.00%
Planes Total		42,663	100.00%	67,681	100.00%	11,082	100.00%
Ships	APAC	-	-	35,323	100.00%	3,070	100.00%
Ships Total		-	-	35,323	100.00%	3,070	100.00%
Trains	APAC	1,681	100.00%	8,226	100.00%	-	-
Trains Total		1,681	100.00%	8,226	100.00%	-	-
Trucks and Buses	APAC	11,298	100.00%	80,634	100.00%	53,735	100.00%
Trucks and Buses Total		11,298	100.00%	80,634	100.00%	53,735	100.00%
Vintage Cars	APAC	111,639	100.00%	147,212	100.00%	105,688	100.00%
Vintage Cars Total		111,639	100.00%	147,212	100.00%	105,688	100.00%

11. Click the **Save As** icon in the toolbar. When the **Save As** dialog box appears, save your report as **Territory - Sales** under /Steel Wheels/Analysis and click **Save**.

You have successfully created a simple Analyzer report from scratch. [Use Analyzer Reports](#) guides you through working with complex Analyzer reports.

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.

- [Dashboard Sample - Sales KPI Dashboard](#)
- [Tour the Dashboard Panels](#)
- [Create Your First Dashboard](#)

Dashboard Sample - Sales KPI Dashboard

This section highlights some popular **Dashboard Designer** capabilities that are available, using the sample dashboard called *Sales KPI Dashboard* located in the Getting Started widget.

1. In the **Getting Started** widget on the **Home** page, click the **Samples** tab.
2. Click to select **Sales KPI Dashboard** from the bottom of the widget.
3. Click **View** in the **Samples** pane.

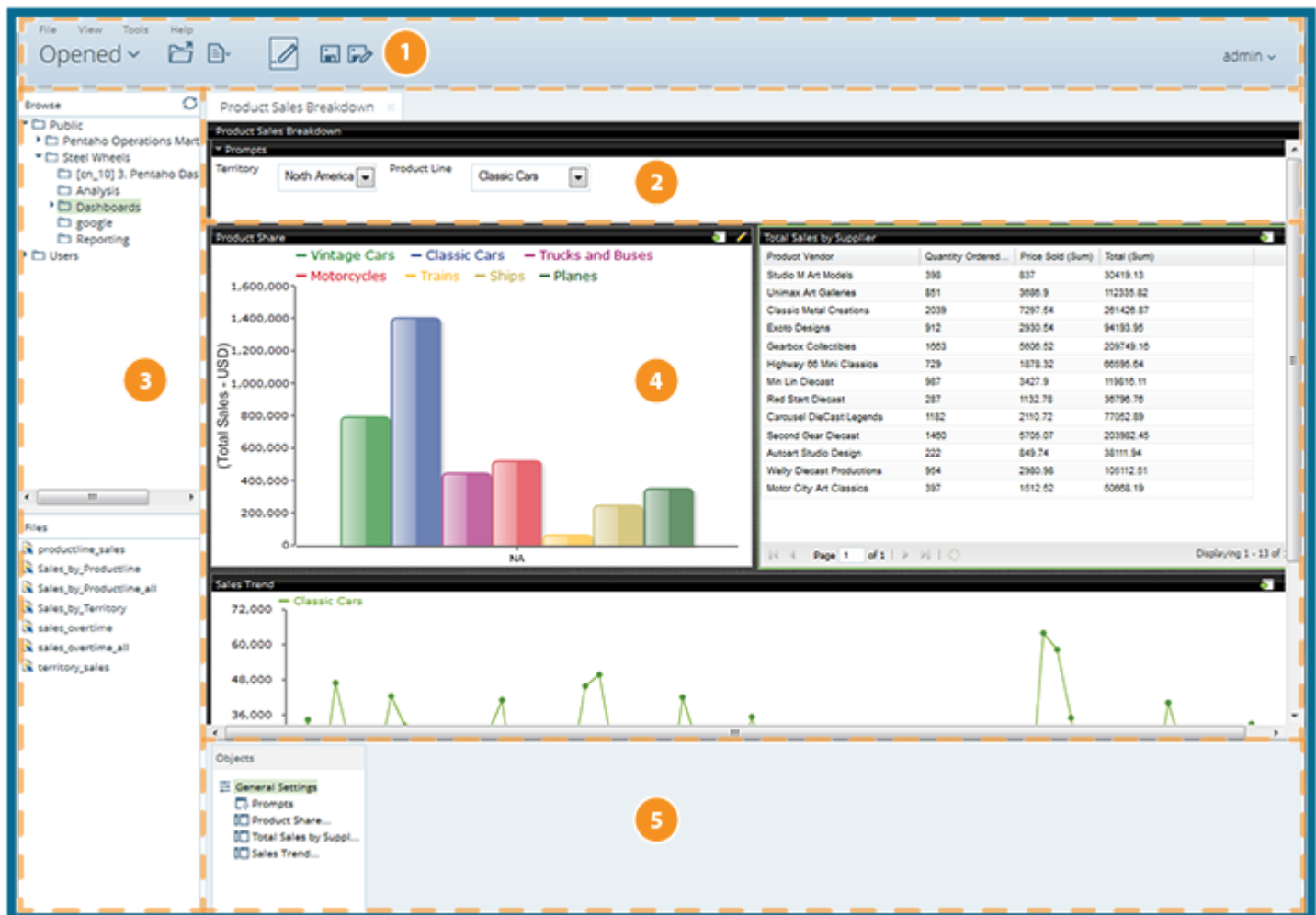


A new window opens showing the **Sales KPI Dashboard** sample dashboard.

Tour the Dashboard Panels

You can view the full version of the **Product Sales Breakdown** in Dashboard Designer 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. Click to highlight the **Dashboards** folder.
2. In the center pane, double-click on **Sales KPI Dashboard**. The **Opened** page appears with the dashboard and panels active.

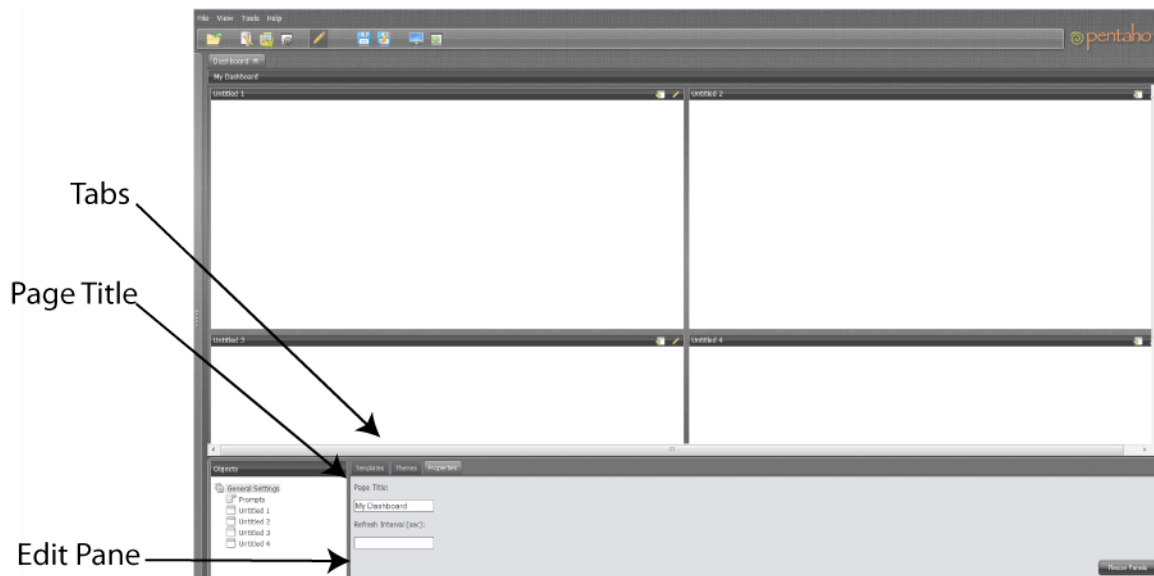


Item	Name	Function
1	Opened view	Displays quick access buttons across the top to create and save new Analysis reports, Interactive reports, and Dashboards. Opened reports and files show as a series of tabs across the page.
2	Prompts panel	The Prompts panel gives you a way to add filters to the individual 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.

Item	Name	Function
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 **1 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.



The name you entered appears on the top left corner of the dashboard.

4. Click the **Themes** tab and select the theme of your choice.
The new theme will be applied to your dashboard immediately.
5. Click the **Properties** tab and type **My Dashboard** in the **Page Title** text box. This is the title for your dashboard page.
6. Locate the Analyzer report you created earlier by going to the Browse pane to the left of the Dashboard canvas and clicking on the **Public** folder, **Steel Wheels**, then the **Analysis** folder. Click-and-drag the **Territory - Sales** file from the Files pane and onto the left dashboard panel.
7. Within the Edit Pane, type **Territory - Sales** in the **Title** text box and click **Apply**.
The left dashboard panel is populated by the **Territory - Sales** report .
8. Locate your Interactive report by going to the Browse pane to the left of the Dashboard canvas and clicking on the **Public** folder, **Steel Wheels**, then the **Reporting** folder. Click-and-drag the **First Interactive Report** file from the Files pane and onto the right dashboard panel.
9. 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 .
10. Click on the **Save as** icon to save your dashboard in a location of your choice.

The screenshot displays the Pentaho Dashboard Designer interface. The main workspace shows a dashboard titled "My Dashboard" with a "Top Five Lines by Territory" table. The table has columns for Territory, Line, Sales, Quantity, Unit Sales, and a sub-total. The data is grouped by territory (APAC, EMEA, Japan, UK) and line type (Classic Cars, Vintage Cars, Motorcycles, Trucks and Buses, Planes). The table is color-coded with yellow and blue headers and rows.

On the left, there is a "Browse" pane with a tree view showing various dashboard components like "Analysis", "Business Rules", "Chart Examples", "Dashboard Examples", "Data Integration with Kettle", "Data Source", "Printing", "Reporting", "Web Service", "Sales", "Analysis", "Charts", "Dashboards", "Guided Ad-hoc", "Models", "Reports", "Step Lighting", "Widgets", "Visual Elements", "Analysis", "Dashboards", "Widget Library", and "Reporting".

On the right, there are two panels. The top panel is titled "Territory: APAC" and "Product Vendor: Autowart Studio Design". It shows a table with columns for Product Name, Scale, Items Sold, and Sales. The bottom panel is titled "Product Vendor: Carousel DieCast Legends" and shows a similar table with columns for Product Name, Scale, Items Sold, and Sales.

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* section of the [Pentaho InfoCenter](#) 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.