

Lesson 1

User Console Overview

In this lesson, you will become acquainted with the Pentaho User Console. Upon launching Pentaho from your browser of choice, you will be faced with a login page. If you are new to Pentaho, please login with either the credentials provided by your administrator or with our sample account;

- Username: admin
- Password: password.

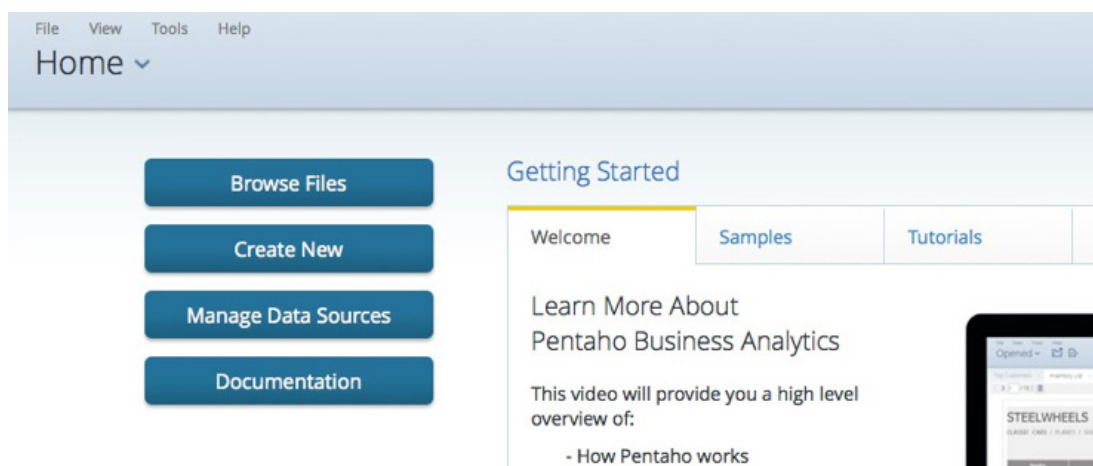


Note: Pentaho has the ability to integrate seamlessly with your current security structure utilizing LDAP configuration or you can use the security module included with Pentaho.

Step by step with Pentaho:

1. On the login page enter user name 'admin'
2. Enter 'password' as the password

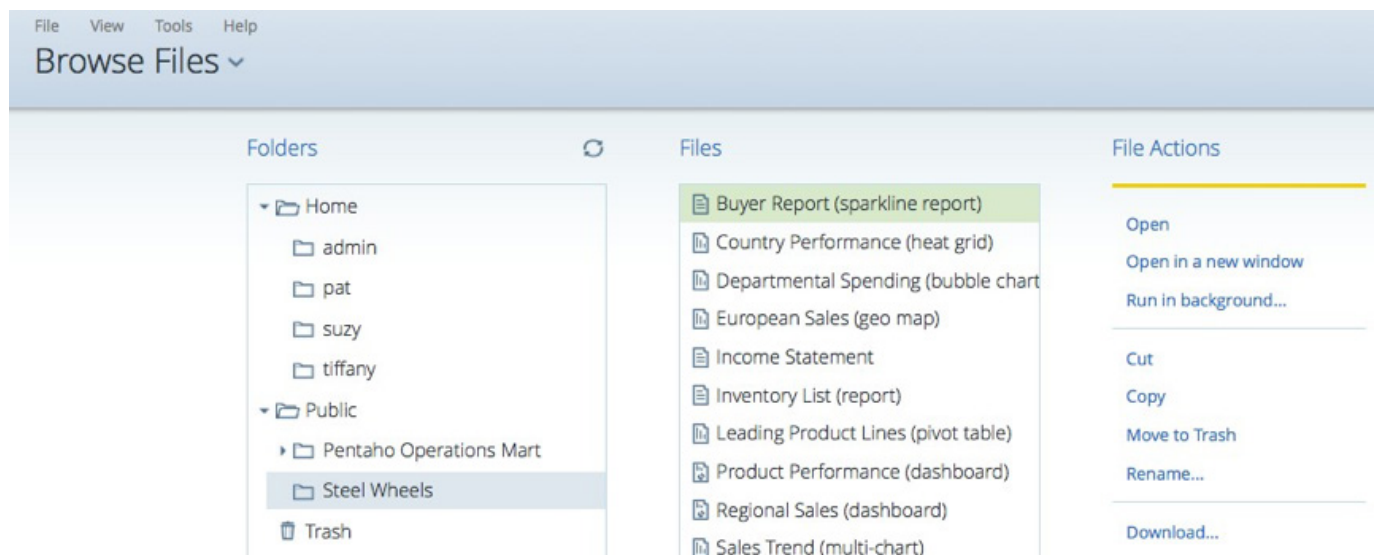
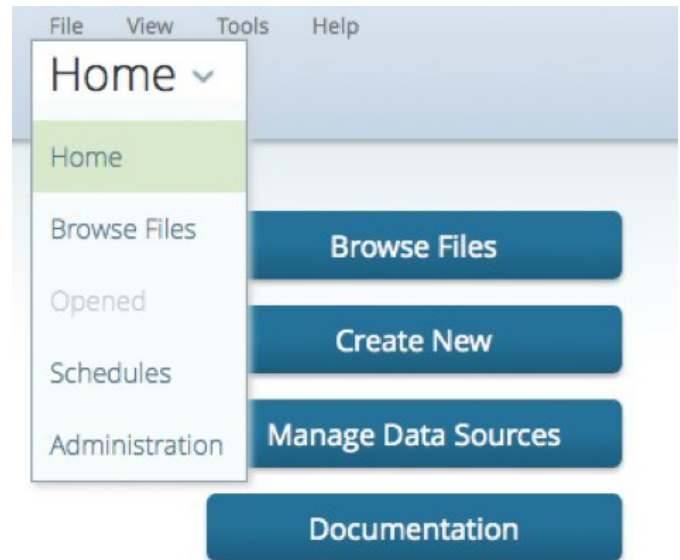
When you first come to the user console, you will be in the "Home" perspective. The "Home" perspective provides quick access to common actions, recently viewed content, and your favorite content. The Getting Started section at the top of the "Home" perspective is a great place for new users browse samples of Pentaho reports, analysis and dashboards, or to learn how to create your own content against your data through a series of short, 3-5 video tutorials.



At the top of your screen you will find the menu bar and Perspective list. The menu bar is always present and provides access to common actions like creating new content, accessing recently accessed items and favorites. The menu bar also provides access documentation.

The Perspective list is the main way to navigate to the main areas of the User Console. The “Browse Files” perspective is where users can access and manage all of the content they have created or have access to in Pentaho.

The left panel displays the directory of files including your personal “home” location, as well as the default “public” space where users share content with other users and groups. Selecting a folder will display the “Files” within that folder in the middle section of the “Browse” perspective. Finally, the Actions list at the right provide fast access to actions available for the selected folder or file such as opening content, scheduling a report to be run or adding an item to your favorites list. We can open a document either by using the ‘Open’ File Action, or by double-clicking on the File you wish to Open.



Upon opening a report, a user is automatically placed in the ‘Opened’ perspective. This perspective is where a user views open reports, analytic views or dashboards. Closing all documents, the user is returned to “Home” perspective.

The final two perspectives, “Schedules” and “Administration”, display only when a user is an administrator of the system or have been given the proper permissions to use the features of these perspectives. Within the “Schedules” perspective users can view and manage all scheduling activities.

File View Tools Help

Schedules ▾ admin ▾

Manage Schedules

Schedule Name ▾	Repeats	Source File	Output Location	Last Run	Next Run	Created By	Status
PentahoSystemVersion	Every day at 14:59:55	PentahoSystemVersionCheck	-	2013 Aug 28 14:59:55	2013 Aug 29 14:59:55	system session	NORMA
UpdateAuditData	Every 30 minutes at 10:54:05	/public/pentaho-operations-mart/update_audit_mart_data/UpdateAuditData	/home/admin	2013 Aug 28 16:54:05	2013 Aug 28 17:24:05	admin	NORMA

Blockout Times
No blockout times for scheduling have been created.

Create Blockout Time

The Manage Schedules table provides information about what's being scheduled when, where the content generated by the schedule will be placed, when the schedule last ran, and the next planned schedule trigger. Clicking on the 'Output Location' link for a schedule takes the user to the Browse perspective to open any documents generated by the schedule.

The final perspective is the "Administration" perspective. This is where users manage and configure the Pentaho Business Analytics server including:

- Managing User & Role security
- Configure security using external credentials from LDAP or Active Directory
- Setup Mail Server settings that allow users to schedule content delivery via email
- Manage Pentaho Enterprise license keys
- Manage cleanup routines for manual or scheduled cleanup of content generated by the scheduling system.

Demonstrator:

1. Click an hover on pertinent areas of the Admin perspective as the announcer describes them
2. Click the "Home" perspective to return the user to the starting point for the next lesson

Congratulations! You have completed step #1 in learning about the Pentaho User Console. To find out more information on this powerful platform please continue on to the next lesson, including:

- Connecting to data sources
- Creating Interactive reports
- Creating Analysis views
- Creating dashboards

Or, contact Pentaho directly to start your free proof of concept with your very own data and the help of our expert sales engineers. Contact Pentaho at <http://www.pentaho.com/contact/>.

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