

## Lesson 3

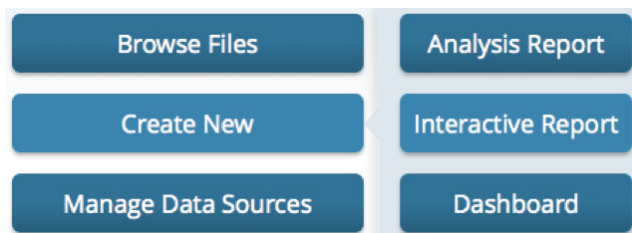
# Creating an Interactive Report

With Pentaho Interactive Reporting users can create quick operational reports through an intuitive design interface that allows for quick results. In this lesson you will create and save an interactive report.

Beginning in the “Home” Perspective of the User Console, click “Create New,” then click “Interactive Report.” If you have other reports open, this same functionality can be accessed under the “File” menu on the menubar by clicking “New Interactive Report.”

Step by Step with Pentaho:

1. Click on Create New, then click “Interactive Report” on the Home Perspective

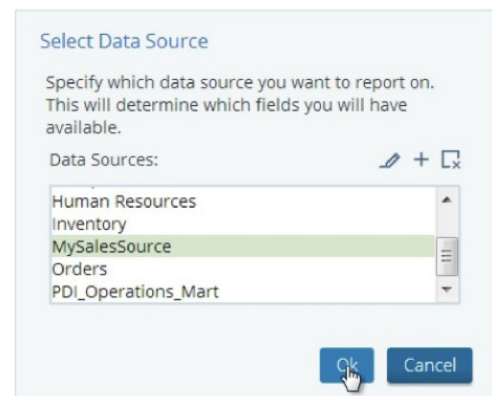


In the “Select Data Source” dialog box, please select the “MySalesSource” data source. If you would like to learn how to create a data source please see the lesson “Connecting to your data”, you can either select the data source by double clicking or selecting and clicking “OK.”

Step by Step with Pentaho:

1. Select the “MySalesSource” data source.
2. Click “OK”

When the introduction screen appears, click “Get Started.” Notice the tool tips give helpful suggestions for moving around within Interactive Reporting. If the tool tips feature is enabled and you would like to disable it, you can click the “Hide Tips” button on the bottom of the page.



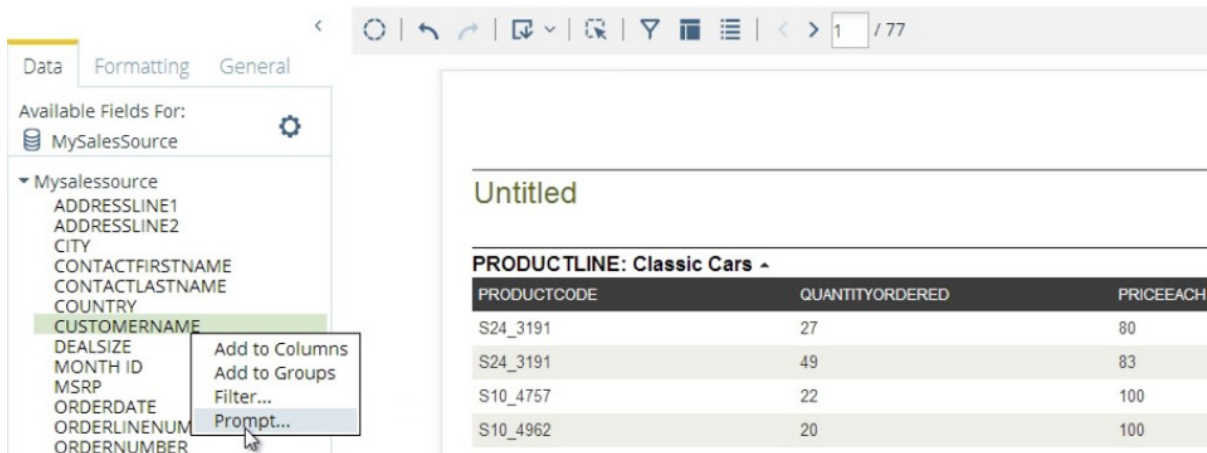
Step by Step with Pentaho:

1. Click “Get Started”
2. Click “Hide Tips” at the bottom of screen.

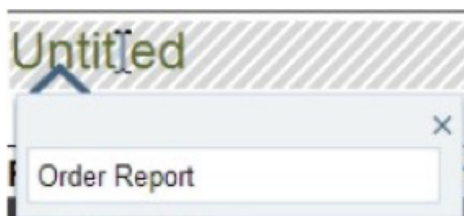
Drag the “Product Line” field to the screen until there is a green horizontal line at the top of the design section. You have now created a group for each product line. Drag the “PRODUCTCODE” field into the detail area of the first group. You will now see each product name within each group they belong to. Also double click the “QUANTITYORDERED” field. Notice it is now also in the detail section of each group. Finally, double click “PRICEEACH.”

Now let’s add a prompt on CUSTOMERNAME by right clicking on CUSTOMERNAME and selecting “Prompt.” You will see a prompt control added to the header allowing users to filter the report data. Double click the title of the report and rename the report “Order Report.” Click the “Save” button on the tool bar. Navigate to the “Steel Wheels” directory by selecting the root directory from the “Location” dropdown, then double click on the “public” directory, then double click on the “Steel Wheels” directory. Name the report “Order Report.”

1. Drag "Product Line" to the screen until you have a horizontal bar in the group section. Drop field.
2. Drag "PRODUCTCODE" to the detail section.
3. Double click "QUANTITYORDERED"
4. Double click "PRICEEACH"
5. Right click "CUSTOMERNAME" and select "Prompt"



6. Select "Signal Gift Stores" from the prompt to filter the data.
7. Double click Untitled in the title bar and change to Order Report.



8. Click the "Save" icon. Navigate to the Steel Wheels directory under public.
9. Save the report as Order Report.

Congratulations!! You have created your first Interactive Report. To find out more information about the powerful Pentaho platform try another lesson or contact Pentaho and start your free proof of concept with the expertise of a Pentaho sales engineer and your data. Contact Pentaho at [www.pentaho.com/contact](http://www.pentaho.com/contact).

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