



Choose Your Workflows



This document supports Pentaho Business Analytics Suite 5.0 GA and Pentaho Data Integration 5.0 GA, documentation revision August 22, 2013, copyright © 2013 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 do not find answers to your questions here, 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](mailto:sales@pentaho.com).

For information about instructor-led training, visit <http://www.pentaho.com/training>.

## Liability Limits and Warranty Disclaimer

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.

## Third-Party Open Source Software

For a listing of open source software used by each Pentaho component, navigate to the folder that contains the Pentaho component. Within that folder, locate a folder named licenses. The licenses folder contains HTML files that list the names of open source software, their licenses, and required attributions.

## Contact Us

Global Headquarters Pentaho Corporation  
Citadel International, Suite 340  
5950 Hazelhine National Drive  
Orlando, FL 32822  
Phone: +1 407 812-OPEN (6736)  
Fax: +1 407 517-4575  
<http://www.pentaho.com>  
Sales Inquiries: [sales@pentaho.com](mailto:sales@pentaho.com)

# Contents

Prepare Evaluation Plan.....	4
Prepare for the Evaluation.....	5
Choose Evaluation Path.....	5
Choose Software Host.....	5
Use the Hosted Demo.....	6
Custom Pentaho Prototype.....	6
Trial Download.....	6
Next Steps.....	6
Evaluate Business Analytics.....	7
Define Your Evaluation Data Source.....	7
Explore and Work with the User Console.....	7
Learn About Report Designer.....	8
Evaluate DI.....	9

# Prepare Evaluation Plan

---

## NEXT STEPS OVERVIEW GRAPHIC GOES HERE?

Before you begin your evaluation of the Pentaho suite of software, there are some questions that you need to consider to make sure that your evaluation is successful.

### What Evaluation Option Will You Use?

There are a few different options for evaluation.

- Demonstration - use the [hosted demo](#) to hands-on explore Pentaho using sample data.
- Custom Demonstration/POC - provide Pentaho with some of your sample data and use cases, and we will build a demonstration that specifically solves the issues that your business wants to address.
- Self-Directed POC - run your own custom demonstration, using [Pentaho Sales](#) for guidance.

### What Resources Do You Need?

Having the right resources in place before you begin are an integral key to the success of your Pentaho evaluation. The resources you need to consider should include both human and technical resources.

- Do you have the [hardware](#) needed for evaluation?
- Who should be involved in the evaluation? Smaller businesses may need only one or a few people involved, while a larger enterprise would need more people such as computer administrators, business users, report designers, and major stakeholders.
- Do you have the [drivers](#) needed to connect to that data?
- Do you have the software needed for evaluation?

### How Do You Schedule the Time You Need For Evaluation?

The evaluation licenses for Pentaho are valid for a full 30 days. Before you activate the Pentaho licenses, allow time to gather your resources and formulate your evaluation plan. Here are some things that you might want to consider as you craft your time frame.

- At what points are your stakeholders available during this time frame?
- What is the targeted date to switch to a production environment?

We recommend that you coordinate with [Pentaho Sales](#) to help you meet key milestones during the evaluation period.

### What Data Will You Use?

A sample data source, such as a CSV, is ideal for evaluation. The sample data source could contain data such as time stamps, geo location data, key metrics, and product or campaign results. This will give you a robust variety of data to evaluate our software against.

- Do you have a sample data source already that is representative of the kinds of data your business uses?
- Where will this data for evaluation come from?(don't want a complex model; a scaled-back CSV is ideal)



**Note:** It is important to not try to implement a complete data warehouse within the 30 evaluation period.

### Next Steps

This should say, now you are ready to begin working to experience a successful evaluation, or some such

# Prepare for the Evaluation

## NEXT STEPS OVERVIEW GRAPHIC GOES HERE?

After you have formed your evaluation plan, prepare for the evaluation. Choose your evaluation path and software host. If you decide to host the software yourself, you'll install and configure the software in this step.

## Choose Evaluation Path

The next step is to determine which evaluation path you want to complete first. Your options are to evaluate Business Analytics tools or Data Integration tools.

How do you choose which path to take? Your decision is largely determined by your data. Consider these questions: How many sources of data do you have? Have you already modeled your data, have you already integrated the data or do you only have one source? Does your data need to be cleaned or transformed? The answer to these questions determines which evaluation path will be most effective for you.

Criteria	BA Evaluation	DI Evaluation
Data	Single source of data or data sources that have already been combined (or that have table joins). Smaller sets of data that is stored traditionally, such as in a spreadsheet or a relational database.	Multiple sources of data that must be combined and integrated. Data that requires cleaning and transformation. Data stored in non-traditional data sources, such as in a NoSQL or Hadoop database, or data from a web service. Big data stored in virtually any type of database. Data requiring ETL processing.
Databases	Relational databases, spreadsheets.	Any type of database.
Reporting Needs	Pixel-perfect reports, geo maps, scatter plots and more.	Basic visualization of data.
Recommended For	Business Analysts who do not need Big Data access, who do not need to ETL data or integrate it. End users who will primarily be generating and using reports.	Data scientists, Data analysts who need to integrate data sources, who will need to perform ETL, who will work with Big Data sources.

If you need both, we suggest that you follow both evaluation paths. Begin with the DI Evaluation path to extract, transform, enrich, and load your data, then complete the BA Evaluation path to visualize it.

## Choose Software Host

Now that you have chosen your installation path, choose how the evaluation software will be hosted. Review the decision table and choose the option that best meets your needs.

Criteria	Hosted Demo	Custom Pentaho Prototype	Trial Download (You Host the Software)
Summary	We provide a cloud-based sandbox that provides an interactive exploration of the of the Business Analytics tool.	You provide sample data to us and we assist you with building a solution using Pentaho tools. A strategy session, blueprints, prototype, and a resource to help you are included.	We provide a trial version of the Pentaho Business Analytics suite that you can download and install on your computer. You will have to configure and administer the software yourself.

Criteria	Hosted Demo	Custom Pentaho Prototype	Trial Download (You Host the Software)
Data	Pentaho supplies sample data.	Sample of data that includes a range of characteristics.	You provide the data sources.
Hardware/Software Requirements	Web Browser	Varies depending on your needs.	At least one computer that has the hardware and software indicated in supporting technologies matrix.
Path	BA Evaluation	BA Evaluation DI Evaluation	BA Evaluation DI Evaluation
Recommendation	Any evaluator who wants a overview of Business Analytics features. Recommended for Business Analysts and Report Designers.	All evaluators. Limited to first-time customers only. Any evaluator who wants to work with data integration tools and Big Data. This approach is also recommended for any evaluator who wants to explore Business Analytics features using a subset of own data.	Any evaluator who wants to independently work with data integration tools and Big Data. This approach is also recommended for any evaluator who wants to independently explore Business Analytics features using their own data. Technical support is available if you need additional help or if you have questions.

## Use the Hosted Demo

To run the hosted demo, visit the [Pentaho website](#). There, you can walk through the guided interactive process.

## Custom Pentaho Prototype

To use the custom demo, simply contact us by clicking the Your Data, Our Servers link at <http://www.pentaho.com/Evaluation-Path/#business-analytics>. Once you have contacted professional services, a representative will guide you through the installation process.

## Trial Download

This process consists of several different steps. At the end of this process, you will have a fully configured system that contains all of the components in the Pentaho Business Analytics Suite.

1. Download the Pentaho Business Analytics Trial Version of the software from the [Pentaho website](#). The trial is only valid for 30 days, so you might not want to download the trial version until you are ready to fully configure it and start your evaluation. Select the appropriate Pentaho Business Analytics file for your operating system.
2. Use the Install All BA Components instructions to install the software. Install all components.
3. Configure the BA Server and design tools.
4. Configure the DI Server and design tool.

## Next Steps

If you went through the Hosted Demo and want to learn more about Pentaho, select the Custom Pentaho Prototype or Trial Download evaluation options to continue. See the Evaluation Installation Decision Table for more details. Otherwise, do one of these things.

- Follow the BA Evaluation Path
- Follow the DI Evaluation Path

# Evaluate Business Analytics

NEXT STEPS GRAPHIC HERE

## Define Your Evaluation Data Source

The BA Server needs to know where to find your data and how to connect to it, what data you want to use, how the data is structured, and what the data is like. The Data Source Wizard helps you define a data source that contains this information and guides you through the creation of your evaluation data model for use in creating reports and analysis.

After you define a data source, you can make it available to other evaluators so they can create reports and analysis by simply picking the data source from the data source list. One data source can be used by any number of reports or analysis.

Objective	Tutorial	Description
1	<a href="#">Creating a Data Source</a> video on the Tutorials tab of the Getting Started section	See how to create a new data source from a CSV file.
	Get Started with Data Models	Learn about how the BA Server and Data Source Wizard work in conjunction to create data sources and models.
	Tour the Data Source Wizard	Explore the Data Source Wizard interface.
2	Choose a Data Source Type	Compare the different data source types that the Data Source Wizard supports. We recommend using a CSV data source for evaluation.
3	Create CSV Data Source	Import and then create your CSV data source using the Data Source Wizard.
4	Edit Data Source Models	(Optional) Edit your evaluation data source model using the Data Source Model Editor.

Learn More:

## Explore and Work with the User Console

The User Console serves as the conduit that connects elements of Analysis and Reporting with your data source to provide you with tools for creating and sharing reports and dashboards.

Objective	Tutorial	Description
1	<a href="#">Pentaho User Console Overview</a> video on the Tutorials tab of the Getting Started section	See a short overview of the entire Pentaho User Console.
	Tour the User Console	Get in-depth information about the features of the User Console and view the sample reports on the Samples tab of the Getting Started Section.
2	<a href="#">Creating an Interactive Report</a> , <a href="#">Creating an Analyzer Report</a> , and <a href="#">Creating a Dashboard</a> videos	See how the User Console is used to quickly create reports and dashboards, through an easy-to-use drag and drop interface.
	Learn About Analysis, Interactive Reports, and Dashboards	Do the tutorials for Interactive Reports, Analyzer Reports, and Dashboard Designer.

Objective	Tutorial	Description
3	Schedule Reports	Learn how to schedule and email reports using the Schedules portion of the User Console.

Learn More: Explore the contents of the Build Full-Featured Solutions > Create Analysis, Interactive Reports, and Dashboards section of the infocenter. This section contains an in-depth tour of the User Console, and detailed instructions on working with Analyzer, Interactive Reports, and Dashboards. If you are an admin, check out the BA sections of Fine-Tune Pentaho Systems, particularly the section called Administer BA Server. It contains a variety of instructions for post-install configuration and maintenance tasks for the Pentaho Business Analytics (BA) Server and all related tools.

## Learn About Report Designer

Pentaho Report Designer is a report creation tool that you can use standalone, or as part of the BA suite. It allows professionals to create print-quality reports based on data from virtually any type of data source.

Objectives are to get familiar with the Report Designer interface, and use it to create and publish a print-quality report - keep business goals/use cases in mind while doing so.

Objective	Tutorial	Description
1	Explore Report Designer <ul style="list-style-type: none"> <li>The Report Designer Main Toolbar</li> <li>The Report Workspace</li> <li>The Structure Pane</li> </ul>	Learn to navigate the Report designer interface before you begin building reports.
2	Create Your First Print-Quality Reports	Create a report, add a chart and parameters, and publish your report using Report Designer.
3	Design Print-Quality Reports	Explore more advanced features of Report Designer.

Learn More: Refining your report, Explore the sections that show you how to Design Print-Quality Reports,

# Evaluate DI

---

TBD. Pentaho Data Integration allows you to connect to virtually any data source because it is data agnostic. You can have deep integration with multiple sources and analytics outputs. You can use RDBMS, files, web services, NoSQL, Analytical DBs, Hadoop. It is scalable as company data continues to grow – multi-threaded. It scales out with clusters. You can also use data integration to control the workflow.

Install JDBC

different people

Data sources