Pentaho User Console

The Pentaho User Console (PUC) is a web-based design environment where you can analyze data, create interactive reports, dashboard reports, and build integrated dashboards to share business intelligence solutions with others in your organization and on the internet. In addition to its design features, the Pentaho User Console offers a wide variety of system administration features for configuring the Pentaho Server.

Parent Topic

- Products

Child Topics

- Log in to the Pentaho User Console
- About Pentaho User Console Perspectives

The PUC interface uses perspectives to extend your ability to work on different tasks at any given time. By default PUC has the Home, Browse, Opened, Schedules and Administration perspectives. You can also extend certain perspectives with plugins from the Pentaho Marketplace.

- Additional Features

In PUC, you can set themes, activate plugins, and access the Data Source Wizard and the Data Source Model Editor.

Log in to the Pentaho User Console

Get started with the Pentaho User Console by following these steps to log in:

Procedure

1. Launch a Web browser and enter the URL of the Pentaho Server. The page loads an introductory screen with a Login section.
2. Enter your user name and password and click Login.
You are now logged into the User Console and ready to start creating and running reports and dashboards.

**About Pentaho User Console Perspectives**

The PUC interface uses perspectives to extend your ability to work on different tasks at any given time. By default PUC has the **Home**, **Browse**, **Opened**, **Schedules** and **Administration** perspectives. You can also extend certain perspectives with plugins from the Pentaho Marketplace.

**Parent Topic**

- [Pentaho User Console](https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console)

**Child Topics**

- [Home](https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console)

After you log in to the User Console, you will see the Home perspective, which serves as the portal for you to access Pentaho tools and features. Home contains easy access buttons so that you can **Browse Files**, **Create New** reports and dashboards, view Pentaho **Documentation**, and quickly open recently viewed or favorite files.
• **Browse**  
The Browse Files perspective helps you keep your files and folders organized and makes them easier for you to find and work with.

• **Opened**  
The Opened perspective uses plugins to provide access to different analytic capabilities. This perspective activates after you open a file from the Browse Files page. It 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.

• **Administration**  
In PUC, the Administration perspective can be used by logged-on users assigned a role that has permissions to administer security can perform system configuration and maintenance tasks.

**Home**  
After you log in to the User Console, you will see the Home perspective, which serves as the portal for you to access Pentaho tools and features. Home contains easy access buttons so that you can **Browse Files**, **Create New** reports and dashboards, view Pentaho **Documentation**, and quickly open recently viewed or favorite files.
<table>
<thead>
<tr>
<th>Item</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Home indicator</td>
<td>Indicates the current User Console perspective that you are using. The Home menu lets you flip easily from page to page, or return to your Home page.</td>
</tr>
<tr>
<td>2</td>
<td>Getting Started</td>
<td>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.</td>
</tr>
<tr>
<td>3</td>
<td>Current User</td>
<td>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.</td>
</tr>
<tr>
<td>4</td>
<td>Browse Files</td>
<td>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.</td>
</tr>
<tr>
<td>5</td>
<td>Create New</td>
<td>Gives you the option to create a new report in Pentaho Interactive Reports, Pentaho Analyzer, or Pentaho Dashboard Designer. If you have permissions to work with data sources, this button also gives you the option to create a new data source.</td>
</tr>
<tr>
<td>6</td>
<td>Documentation</td>
<td>Documentation for Pentaho products.</td>
</tr>
<tr>
<td>7</td>
<td>Recents</td>
<td>Shows a list of your most recently opened files. Clicking on the star icon next to a recently opened file adds it to your Favorites list.</td>
</tr>
<tr>
<td>8</td>
<td>Favorites</td>
<td>Shows a list of your favorite files for quick access.</td>
</tr>
</tbody>
</table>

Parent Topic

- **About Pentaho User Console Perspectives**

  The PUC interface uses perspectives to extend your ability to work on different tasks at any given time. By default PUC has the Home, Browse, Opened, Schedules and Administration perspectives. You can also extend certain perspectives with plugins from the Pentaho Marketplace.
**Browse**

The **Browse Files** perspective helps you keep your files and folders organized and makes them easier for you to find and work with.

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<tr>
<td>1</td>
<td><strong>Browse Files</strong> indicator</td>
<td>Indicates the current User Console perspective that you are using. <strong>Browse Files</strong> shows you how to locate your files and folders and the different actions you can do with them. Displays the <strong>Folders</strong>, <strong>Files</strong>, and <strong>Actions</strong> panes.</td>
</tr>
<tr>
<td>2</td>
<td><strong>Folders</strong></td>
<td>Shows a list of folders that you can browse through to locate your files. You can also use the <strong>Browsing</strong> pane to create new folders or delete old ones.</td>
</tr>
<tr>
<td>Item</td>
<td>Name</td>
<td>Function</td>
</tr>
<tr>
<td>------</td>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td>3</td>
<td>Files</td>
<td>After you select something in the <strong>Browsing</strong> pane, the <strong>Actions</strong> pane populates with a list of things you can do with the folders. Generates and shows a list of all files contained in the folder that is selected in the <strong>Browsing</strong> pane. After you select a file, the <strong>Actions</strong> pane populates with a list of things you can do with the file.</td>
</tr>
</tbody>
</table>
| 4    | Actions | The actions displayed depend upon the selection made in the **Folders** pane, as follows:  
• The **Folder Actions** pane gives you the ability to:  
  ◦ Create, delete, and rename folders.  
  ◦ Paste files in a folder.  
  ◦ **Upload** files.  
  ◦ **Download** files.  
  ◦ View the **Properties**, **Allow Scheduling**, set to Hidden, and control the folder’s permissions for Users and Roles (Manage Permissions, Delete, Write, and Read).  
• The **File Actions** pane gives you the ability to:  
  ◦ Open files in the current window or in a new one.  
  ◦ **Run files in the background**.  
  ◦ Edit, delete, cut, copy, or paste files or folders  
  ◦ Share files with others  
  ◦ **Schedule reports to run automatically**.  
  ◦ Add files to your **Favorites** widget.  
  ◦ View the **Properties** of |
<table>
<thead>
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<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>a file or folder.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The Actions for Trash gives you the ability to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Restore a file in Trash Contents.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Permanently delete a file.</td>
</tr>
</tbody>
</table>

**Parent Topic**

- [About Pentaho User Console Perspectives](https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console)

The PUC interface uses perspectives to extend your ability to work on different tasks at any given time. By default PUC has the **Home**, **Browse**, **Opened**, **Schedules** and **Administration** perspectives. You can also extend certain perspectives with plugins from the Pentaho Marketplace.

**Opened**

The Opened perspective uses plugins to provide access to different analytic capabilities. This perspective activates after you open a file from the Browse Files page. It provides a simple space to work with your files.

Depending on your subscription, you may have access to any of the following plugins:

- Analyzer
- Interactive Reports
- Dashboard Designer
- CTools
<table>
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<tr>
<th>Item</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
</table>
| 1    | **Opened indicator**<br>**Open**<br>New Interactive, Analyzer, Dashboard, or Data Source | Indicates the current User Console perspective that you are using. **Opened** displays the files that you access from the Browse Files pane.  
- **Open** serves as a quick way to browse for more files to open without leaving the **Opened** page. These additional files open in new tabs across the Report Window.  
- Quick start buttons to create a new Interactive or Analyzer, Dashboards. You can also use this button to create a new Data Source, if you have permissions to work with data sources. |
| 2    | **Edit, Save, and Save As** | Gives you the ability to perform these functions on the active file in the Report Window: edit, save the file with a default name in the same location, or save the file with a different name and in any location on the repository or your desktop. |
### 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.

The list of schedules shows which reports 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.
<table>
<thead>
<tr>
<th>Item</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Repeats</td>
<td>Describes how often the schedule is set to run.</td>
</tr>
<tr>
<td>4</td>
<td>Source File</td>
<td>Displays the name of the file associated with the schedule.</td>
</tr>
<tr>
<td>5</td>
<td>Output Location</td>
<td>Shows the location where the scheduled report is saved.</td>
</tr>
<tr>
<td>6</td>
<td>Last Run</td>
<td>Shows the last time and date when the schedule was run.</td>
</tr>
<tr>
<td>7</td>
<td>Next Run</td>
<td>Shows the next time and date when the schedule will run again.</td>
</tr>
<tr>
<td>8</td>
<td>Status</td>
<td>Indicates the current Status of the schedule. The state can be either Normal or Paused.</td>
</tr>
<tr>
<td>9</td>
<td>Blockout Times</td>
<td>Lists the times when all schedules are blocked from running.</td>
</tr>
</tbody>
</table>

You can edit and maintain each of your schedules by using the controls the following table. See Schedule Reports for more information.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="refresh-icon" alt="Refresh Icon" /></td>
<td>Refresh</td>
<td>Refreshes the list of schedules.</td>
</tr>
<tr>
<td><img src="run-now-icon" alt="Run Now Icon" /></td>
<td>Run Now</td>
<td>Runs a selected schedule(s) at will.</td>
</tr>
<tr>
<td><img src="stop-scheduled-task-icon" alt="Stop Scheduled Task Icon" /></td>
<td>Stop Scheduled Task</td>
<td>Pauses a specified schedule. Use Start Schedule to start paused jobs.</td>
</tr>
<tr>
<td><img src="start-scheduled-task-icon" alt="Start Scheduled Task Icon" /></td>
<td>Start Scheduled Task</td>
<td>Resumes a previously stopped schedule.</td>
</tr>
<tr>
<td><img src="edit-scheduled-task-icon" alt="Edit Scheduled Task Icon" /></td>
<td>Edit Scheduled Task</td>
<td>Edits the details of an existing schedule.</td>
</tr>
<tr>
<td><img src="remove-scheduled-task-icon" alt="Remove Scheduled Task Icon" /></td>
<td>Remove Scheduled Task</td>
<td>Deletes a specified schedule. If the schedule is currently running, it continues to run, but it will not run again.</td>
</tr>
</tbody>
</table>

Schedule Reports
You can use the Browse perspective to schedule a report to run at regular intervals, on certain dates and
times, and with different parameters. See Schedule Reports for more information.

Parent Topic

- **About Pentaho User Console Perspectives**

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**Administration**

In PUC, the Administration perspective can be used by logged-on users assigned a role that has permissions to administer security can perform system configuration and maintenance tasks.

If you see Administration in the left drop-down menu on the Home page, you can click it to reveal menu items specific to administration of the Pentaho Server. If you do not have administration privileges, Administration does not appear within the console.

<table>
<thead>
<tr>
<th>Item</th>
<th>Control Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Administration</td>
<td>In PUC, open the Administration perspective. The Administration perspective enables you to set up users, configure the mail server, change authentication settings on the Pentaho Server, and install software licenses for Pentaho.</td>
</tr>
<tr>
<td>2</td>
<td>Users &amp; Roles</td>
<td>Manage the Pentaho users or roles for the Pentaho Server <a href="https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console">Learn more</a></td>
</tr>
<tr>
<td>3</td>
<td>Authentication</td>
<td>Set the security provider for the Pentaho Server to either the default Pentaho Security or LDAP/Active Directory. <a href="https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console">Learn more</a></td>
</tr>
<tr>
<td>4</td>
<td>Mail Server</td>
<td>Set up the outgoing email server and the account used to send reports</td>
</tr>
</tbody>
</table>
Manage Users and Roles
Add, assign, and delete users/roles in the Manage Users and Manage Roles tabs.

Parent Topic
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Additional Features
In PUC, you can set themes, activate plugins, and access the Data Source Wizard and the Data Source Model Editor.

Parent Topic
- Pentaho User Console

Child Topics
- Setting Themes
- Plugins
  You can activate several plugins in the Pentaho User Console.
  - Data Source Wizard
  - Data Source Model Editor

Setting Themes
The User Console has three themes built in, called Crystal, Ruby, and Sapphire. Ruby is the default theme. To change the theme to Crystal or Sapphire, follow these instructions.

Note
Before proceeding, save any edits you have made in the User Console to your reports, dashboards, etc.

Procedure

1. From any page of the User Console, click View in the upper-left menu bar.
2. Select Themes, then select the theme you want to use from the drop-down menu.

3. When prompted, select Yes, Change Theme.

Results
The Home page refreshes and appears with your chosen theme.

This sample screen is the Crystal theme:

Parent Topic

- Additional Features

In PUC, you can set themes, activate plugins, and access the Data Source Wizard and the Data Source Model Editor.

Plugins

You can activate several plugins in the Pentaho User Console.

- Pentaho Analyzer: Conceptualize your data, add query parameters and filters, drill-down links, and create visualizations.
- Pentaho Interactive Reports: Create simple and on-demand operational reports without depending on IT or report developers.
- Pentaho Dashboard Designer: Create dashboards that help decision makers gain critical knowledge at a glance.
- CTools: Use a set of community-driven tools to help you develop and define your data structure, which you can then use in dashboards.
In PUC, you can set themes, activate plugins, and access the Data Source Wizard and the Data Source Model Editor.

**Data Source Wizard**

The Data Source Wizard helps you define a data source that contains your information and guides you through the creation of your first relational or multidimensional data models for use in creating reports and analysis.

[Learn more](https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console)

**Data Source Model Editor**

The Data Source Model Editor allows you to change relational and multidimensional data models to make your data more accessible.

[Learn more](https://help.pentaho.com/Documentation/8.3/Products/Pentaho_User_Console)