

Pentaho Reporting - User Guide for Report Designer

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What is Pentaho Reporting

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Pentaho Reporting is a suite of tools for creating pixel perfect reports. With Pentaho Reporting you are able to transform data into meaningful information tailored to your audience. You can create HTML, Excel, PDF, Text or printed reports. If you are a developer, you can also produce CSV and XML reports to feed other systems.

What is a report?

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In its most basic form, a report is a document that contains information for the reader. When speaking of computer generated reports, these documents refine data from various sources into a human readable form. Report documents make it easy to distribute specific fact-based information throughout the company.

Additional Resources

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A list of books and additional tools you may need to work with Pentaho Reporting as efficiently as possible.

Installing and configuring PRD

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This page will guide you through the process of installing the Pentaho Report Designer Community Edition.

In addition it also covers any additional optional steps needed to install extra fonts. Finally I will explain how to configure the Pentaho Reporting Engine and the Pentaho Report Designer.

Pentaho Reporting User Manual

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Creating a report the sane way: Have a Concept, Get the Data, Make the Report

Creating a report is the same as creating any other document. You *can* start with dropping elements on the canvas, but generally it pays off ten-fold to start with a proper plan before you create your queries or report.

1. Conceptual Stage

Key questions asked:

- Who is the recipient of the report?
- What is the purpose of the report?
- Or: What information must the report include at which detail level?

Every report ever created is aimed at a specific target user, which I shall call the *reader*. To be effective, it has to contain the right information your reader. The resulting document must have all the context information required to get your point across but should minimize the amount of unnecessary data and noise, which would only distract your reader from the key points of your report.

The information you need to include depends on what your reader needs to do with the information.

Example: The same data - two different uses

A regional manager is responsible for monitoring the performance of the company. To judge whether the predicted sales numbers are met, he only needs aggregate numbers for all sales per region.

Your secretary in the sales department also needs access to the same sales numbers. But he needs a detailed list of each sale done yesterday so that he can generate the invoices for it.

Ask your reader what information he needs.

Ask in what sort order the information needs to be given.

How much detail is needed?

The majority of reports will fall within three styles of reports:

- (1) Detailed Item List
- (2) Summary Report
- (3) Summary Report with Detailed Item List

2. Data

Once you know the information you need, you can begin to plan on where to acquire the information from.

Key Questions asked:

- Where do I get the data from?
- Is the data readily available in a database or data warehouse?
- Do I need to create additional processes to get my data? How often do I need the data? How expensive is it to get the data?

3. Design

- What elements do I need? How do I need to organize the data visually? Can I convey the information as chart?

<read more>

When to use tables and when to use charts

Summary information as charts.

Detail information as table

Sometimes: Visualize data with sparklines

Other documentation

[Using the BI-Server](#)

[BI-Server Reporting Plugin Documentation](#)

[Report Bursting](#)