



Install Only BA Tools



This document supports Pentaho Business Analytics Suite 5.0 GA and Pentaho Data Integration 5.0 GA, documentation revision August 28, 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.

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 Hazeltine 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

Contents

Introduction.....	4
Overview of BA Design Tool and Plugin Installation Process.....	5
Prepare Environment.....	6
Install Java JRE or JDK.....	6
Set Environment Variables.....	6
Set Windows PENTAHO_JAVA_HOME Variable.....	6
Set Linux PENTAHO_JAVA_HOME Variable.....	7
Install BA Design Tools Overview.....	8
Choose Installation Method.....	8
Install the Design Tools and Plugins.....	8
Use the Wizard to Install Design Tools and Plugins.....	8
Use the BA Installation Wizard to Install BA Design Tools and Plugins.....	8
Use the Manual Method to Install BA Design Tools and Plugins.....	9
Install the Analysis Enterprise Edition Plugin.....	10
Next Steps.....	11

Introduction

This section explains how to install BA design tools and plugins so that you can analyze and visualize data, create reports, and build data models.

Prerequisites

Before you begin, you must have already installed the BA Server. The BA Server can be installed on the same computer on which you plan to install the design tools, or on a different computer that is on the same network.

Expertise

The topics in this section are written for anyone who needs to install BA design tools.

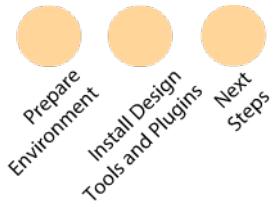
Tools

You must supply a workstation that meets the hardware and software requirements indicated in the [*support technologies*](#) section, as well as a supported operating system and JRE or JDK.

Login Credentials

All of the tasks in this section require that you have the appropriate privileges and accesses required to install software on the computer.

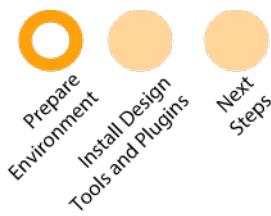
Overview of BA Design Tool and Plugin Installation Process



To perform web-based data analysis, create reports, and create dashboards, install the BA design tools. There are four BA design tools: Aggregation Designer, Metadata Editor, Report Designer, and Schema Workbench. There are also several plugins, including Dashboard Designer, Analyzer, and Pentaho Mobile. The *guidepost* outlines the installation process.

- ***Prepare Environment***: Prepare the computer on which you want to install the design tool and plugins.
- ***Install Design Tools and Plugins***: Use the wizard or manual process to install the design tool and plugins.
- ***Next Steps***: Determine what to do after the design tool and plugins have been installed.

Prepare Environment



To prepare the computer on which you plan to install the BA design tool and plugins, complete these tasks.

- [Install Java JRE or JDK](#).
- [Set environment variables](#).

Install Java JRE or JDK

Make sure that the version of the Java Runtime Environment (JRE) or the Java Development Kit (JDK) that Pentaho needs to run is installed on your system. You do not need to uninstall other versions of Java if you already have them running on your system. These instructions explain how to check for your default version of Java that is running on your computer and where to get the required version if you need one.

1. Check the [supported technologies](#) list to see which version of the JRE or JDK is needed for the software.
2. If you have not done so already, log into the computer on which you plan to install the software. Ensure that you have the appropriate permissions to install software.
3. Open a **Terminal** or a **Command Prompt** window. Enter this command.

```
java -version
```

4. If the version of Java does not match the version needed to run Pentaho software, check your system to see if there are other versions of Java installed.
5. If the version of Java that you need to run Pentaho software is not on your system, [download it from the Oracle site](#) and install it.

Set Environment Variables

Set the `PENTAHO_JAVA_HOME` variable to indicate the path to the Java JRE or JDK that Pentaho should use. If you do not set this variable, then Pentaho will not start correctly.

To set environment variables, you should be logged into an account that has administrator-level privileges. For Linux systems, you must be logged into the **root** user account.

Set Windows `PENTAHO_JAVA_HOME` Variable

1. From the **Start** menu, right-click **Computer**, then select **Properties** from context menu.
2. Click **Advanced System Settings**. The **System Properties** window appears.
3. In the **System Properties** window, click the **Advanced** tab, then click **Environment Variables**.
4. To set the `PENTAHO_JAVA_HOME` variable do this.
 - a) In the **System Variable** section, click **New**.
 - b) In the window that appears, type `PENTAHO_JAVA_HOME` in the **name** field.
 - c) In the **value** field, enter the directory where your Oracle JDK or Oracle JRE is stored. For example your Java JRE is in the `Program Files\Java\jre7` directory, type this.

```
C:\Program Files\Java\jre7
```

- d) Click **OK**.
5. Click **Apply Changes**.
6. Log out, then log back in.

7. To verify that the variables have been properly set, open a **Command** window and type this.

```
echo %PENTAHO_JAVA_HOME%
```

Set Linux PENTAHO_JAVA_HOME Variable

1. Open a **terminal** window and log in as **root**.
2. Open the `/etc/environment` file with a text editor.

Note: The vi and gedit text editors are available on most Linux machines. For example, to open the `/etc/environment` file with gedit, type this.

```
gedit /etc/environment
```

3. Indicate where you installed Java in your `/etc/environment` file by typing this.

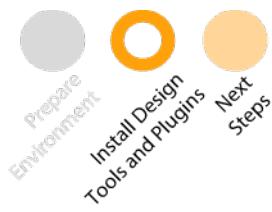
Note: Substitute `/usr/lib/jvm/java-7-sun` with the location of the JRE or JDK you installed on your system.

```
export PENTAHO_JAVA_HOME=/usr/lib/jvm/java-7-sun
```

4. Save and close the file.
5. Log out, then log back in for the change to take effect.
6. Verify that the variables are properly set by opening a **Terminal** window and typing this.

```
env | grep PENTAHO_JAVA_HOME
```

Install BA Design Tools Overview



This step consists of these tasks.

- [Choose Installation Method](#)
- Use the [Wizard](#) or [Manual](#) methods to install the design tool and plugins.

Choose Installation Method

There are two methods by which you can install the design tools and plugins: wizard and manual. Review the table to determine which method is best for you.

Table 1: BA Design Tools and Plugins Installation Decision Table

If You Are Interested In	Choose Options	
	Wizard	Manual
• Summary	The Wizard is the easiest way to install BA Design Tools and Plugins. The Wizard allows you to install design tools and plugins on the server or client workstations.	The manual method allows you to manually copy design tool and plugin installation files to any directory on the server or client workstations.
• Expertise	Basic computer knowledge.	Basic computer knowledge.
• Time	15 minutes.	15 minutes.
• Recommendation	This is the preferred method. Use for the Pentaho Trial Download, evaluating, and rapid development.	Use for rapid development. Use this method if you want to manually install design tools in any directory.

Now that you have selected the installation method, follow the instructions in that section to install the design tool and plugins.

- [Wizard Installation Method](#)
- [Manual Installation Method](#)

Install the Design Tools and Plugins

Install the design tools and plugins using the Wizard or Manual Methods.

Use the Wizard to Install Design Tools and Plugins

The Wizard is the preferred method to install design tools and plugins.

Use the BA Installation Wizard to Install BA Design Tools and Plugins

The preferred method for installing BA Design Tools is to use the Installation Wizard.

1. Run the Installation Wizard according to the instructions in the Install All Component documentation. As you follow the instructions, do these things.

- a) When the **Pentaho Applications** window displays during the installation wizard process, select any combination of **Aggregation Designer**, **Metadata Editor**, **Report Designer**, **Schema Workbench**, **Analyzer**, **Dashboard Designer**, or **Pentaho Mobile** to install design tools and plugins.
- b) Do not select the **BA Server** option if you are installing the tool on a workstation.

2. When complete, to start the tools, do one of these things.

- a) **Windows:** Select the tool you want to start from the **Start** menu.
- b) **Linux:** Open a **Terminal** window, then navigate to `~/pentaho/design-tools/` and launch the tool.
- c) **Mac:** Navigate to the `Applications/pentaho/design-tools/` and double-click the file.

Use the Manual Method to Install BA Design Tools and Plugins

To manually install design tools and plugins, do these things. If you want to install Pentaho Analysis Enterprise Edition, skip these steps and see [Install Pentaho Analysis Enterprise Edition](#) section instead.

1. Download the design tool and plugin installation files you want to install from the Pentaho website.
 - Aggregation Designer Design Tool: `pad-ee-5.0.0-dist.zip`
 - Metadata Editor Design Tool: `pme-ee-5.0.0-dist.zip`
 - Report Designer Design Tool (For Window and Linux only): `prd-ee-5.0.0-dist.zip`
 - Report Designer Design Tool (For Mac OS only): `prd-ee-mac-5.0.0-dist.zip`
 - Schema Workbench Design Tool: `psw-ee-3.6.0-dist.zip`
 - Dashboard Designer Plugin: `pdd-plugin-ee-5.0.0-dist.zip`
 - Geo Plugin: `pentaho-geo-5.0.0-dist.zip`
 - Interactive Reporting Plugin: `pir-plugin-ee-5.0.0-dist.zip`
 - Mobile Plugin: `pentaho-mobile-plugin-5.0.0-dist.zip`
 - Pentaho Analyzer Plugin: `paz-ee-5.0.0-dist.zip`
2. Unpack the file by completing these steps.
 - a) Use a zip tool to extract the file you just downloaded. Do not use Unarchiver 3.3 to unzip files; it may corrupt the plugin file names.
 - b) Open a **Command Prompt** or **Terminal** window and navigate to the folder that contains the files you just extracted.
 - c) Enter one of the following at the prompt.

Windows:

```
install.bat
```

Linux:

```
./install.sh
```

- d) Read the license agreement that appears. Select **I accept the terms of this license agreement**, then click **Next**.
Note: If you are unpacking the file in a non-graphical environment, open a **Terminal** or **Command Prompt** window and type `java -jar install.jar -console` and follow the instructions presented in the window.
- e) Indicate where you want the file to be unpacked. It doesn't matter where because you will be manually placing the files in the appropriate directories later in these instructions.
- f) Click the **Next** button.
- g) The **Installation Progress** window appears. Progress bars indicate the status of the installation. When the installation progress is complete, click **Quit** to exit the Unpack Wizard.

3. To install the Aggregation Designer, Metadata Editor, Report Designer, or Schema Workbench Design Tools, do these things.

- a) You can install design tools in any directory and on any workstation or server. But, if you want to publish reports, models, and schemas generated by the design tools, install them on a workstation or server that is on the same network as the BA Server. If you are unsure of the directory in which to install the design tools, we suggest that you create a `pentaho` directory and `design-tools` subdirectory on your workstation and install the design-tools there. If you choose this option, the directory path should look like this.

```
pentaho/design-tools
```

- b) Verify that you have the appropriate permissions to read, write, and execute commands in the directories you created.
- c) Extract the design tool installation file(s) to the design-tools directory. As you extract the installation files, directories that hold the design tools are created.

```

pentaho/design-tools/aggregation-designer (Aggregation Designer)
pentaho/design-tools/metadata-editor (Metadata Editor)
pentaho/design-tools/report-designer (Report Designer)
pentaho/design-tools/schema-workbench (Schema Workbench)

```

4. To install plugins, do these things.

- a) Navigate to the following path: /pentaho/server/biserver-ee/pentaho-solutions/system/.
- b) Copy the plugins to the appropriate folders as indicated in the list.

```

biserver-ee/pentaho-solutions/system/analyzer (Pentaho Analyzer)
biserver-ee/pentaho-solutions/system/dashboards (Pentaho Dashboard Designer)
biserver-ee/pentaho-solutions/system/pentaho-geo (Pentaho Geo)
biserver-ee/pentaho-solutions/system/pentaho-interactive-reporting (Pentaho
Interactive Reporting)
biserver-ee/pentaho-solutions/system/pentaho-mobile-plugin (Pentaho Mobile)

```

Install the Analysis Enterprise Edition Plugin

Follow the instructions below to install the Pentaho Analysis Enterprise Edition package, which contains Analysis engine enhancements for large ROLAP deployments. This procedure does not cover Pentaho Analyzer installation, which is [covered in this section](#).

1. If you have not already done so, retrieve the `pentaho-analysis-ee-5.0.0` file from the Pentaho website.
2. Unpack the file to a temporary location.
3. Stop the BA Server if it is running.
4. Copy the following JARs from the `/pentaho-analysis-ee/lib/` directory to the `/tomcat/webapps/pentaho/WEB-INF/lib/` directory.
 - `pentaho-analysis-ee-5.0.0.jar`
 - `infinispan-core-5.3.0.Final.jar`
 - `jboss-logging-3.1.1.GA.jar`
 - `jboss-marshalling-1.3.15.GA.jar`
 - `jboss-marshalling-river-1.3.15.GA.jar`
 - `jboss-transaction-api_1.1_spec-1.0.0.Final.jar`
 - `jgroups-3.3.1.Final.jar`
 - `staxmapper-1.1.0.Final.jar`
5. Copy all of the configuration files from `/pentaho-analysis-ee/config/` to the `/tomcat/webapps/pentaho/WEB-INF/classes/` directory.
6. Depending on the installation type; there would not be a **pentaho.war** (in archive based installations and executable based installations the **pentaho.war** is already deployed and the application will show as: `/tomcat/webapps/pentaho/`).
7. Remove the temporary **pentaho-analysis-ee** directory.
8. To enable the segment cache plugin, you first follow the installation steps above. Once this is done, open the file `WEB-INF/classes/pentaho-analysis-config.xml` and set the following property. See <http://wiki.pentaho.com/display/analysis/Pentaho+Analysis+EE> for more details.

```

<entry key="USE_SEGMENT_CACHE">true</entry>

```

Pentaho Analysis Enterprise Edition is now installed with the default Infinispan configuration.

Next Steps



Now that you have installed BA Design Tools, it is time to [configure them](#).

Learn More

- [Print-Quality Reports Tutorial](#) using the Report Designer
- [Design Print-Quality Reports](#) using the Report Designer
- [Work with Relational Metadata Data Models](#) using Metadata Editor
- [Work with Mondrian Multi-Dimensional Data Models](#) using Schema Workbench
- [Optimize Mondrian Data Models](#) using Aggregation Designer