Select Business Analytics (BA) Installation Option

Help and Support Resources

If you do not find answers to your quesions 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.

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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.

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Introduction

There are several different methods for installing the Pentaho Business Analytics (BA) Suite. This article helps you decide which method is best for you. The BA Suite consists of BA and Data Integration (DI) components. If you want to install DI components only, see *Select Data Integration (DI) Installation Options*. If you want to upgrade your current version of the BA components to the newest version, see *Upgrade BA Systems*. To upgrade your current version of the DI components to the newest version, see *Upgrade DI Systems*.

Prerequisites

There are no prerequisites for this article.

Expertise

No special expertise is required to understand the concepts presented in this article.

About Pentaho BA Suite Components

These tables list the components that come with the BA Suite, including both BA and DI components.

Table 1: BA Components Table

Component Type	Name	Description
Server	BA Server and User Console	Hosts Pentaho-created and user-created content. The BA Server is bundled with the User Console, which is a web-based interface that allows you to administer the server. The User Console also allows you to create business analytics content, display and schedule reports using a web-based interface, and manage Pentaho security.
Design Tool	Aggregation Designer	Provides you with a simple interface that allows you to create aggregate tables from levels within the dimensions you specify. Based on these selections, the Aggregation Designer generates the Data Definition Language (DDL) for creating the aggregate tables, the Data Manipulation Language (DML) for populating them, and an updated Mondrian schema which references the new aggregate tables.
Design Tool	Metadata Editor	Helps you build Pentaho metadata domains and models. A Pentaho Metadata Model maps the physical structure of your database into a logical business model. These mappings are stored in a centralized metadata repository and allow administrators to create business-language definitions for complex or cryptic database tables, set security parameters, localize data, add calculations, and format report data.
Design Tool	Report Designer	Generates pixel-perfect reports using a standalone client.
Design Tool	Schema Workbench	Allows you to edit and create multidimensional models. Adds security and complex calculations to the model.
Plugin	Analyzer	Helps you filter and visualize data to make informed business decisions.
Plugin	Interactive Reports	Creates template-based, on-demand reports in an intuitive, drag-and-drop environment.
Plugin	Mobile	Allows you to run and view content on a mobile platform.

Table 2: DI Components Table

Component Type	Name	Description
Server	Data Integration Server	The DI Server is a core component that executes data integration jobs and transformations using the Pentaho Data Integration Engine. It allows you to manage users and roles (default security) or integrate security to your existing security provider

Component Type	Name	Description
		such as LDAP or Active Directory. The DI Server provides the ability to centrally store and manage your data integration jobs and transformations. It also provides the services allowing you to schedule and monitor scheduled activities, which are accessed from Spoon.
Design Tool	Spoon	Graphical design environment for modeling Jobs and Transformations. Transformations are metadata models describing the flow of data. Jobs are workflow-like models for coordinating resources, execution and dependencies of data integration activities. It also provides a user interface to the DI Server for managing security and schedules.
Design Tool	Kitchen	Command line tool for executing jobs modeled in Spoon. You can use Kitchen to run jobs at a specific time. For instance, you can use Kitchen to write a cron job that will generate a daily sales report at 3:00 a.m. each morning.
Design Tool	Pan	Command line tool for executing transformations modeled in Spoon. This is similar to Kitchen, but where Kitchen executes jobs, Pan executes transformations.
Design Tool	Carte	Carte is a web server that enables remote execution of jobs and transformations.
Plugin	Instaview	Instaview is software that allows you to use templates to manage the complexities of data access and preparation. Instaview automatically generates transform and metadata models, executes them, and allows you to visualize the results.
Plugin	Agile BI	Provides a set of tools that allows developers to collaborate on BI project prototyping. It provides Modeling and Visualization perspectives.

Decide Where to Install Components

If you are evaluating the BA Suite, we strongly recommend that you install all components on one computer. This enables you to take full advantage of the tutorials and samples we provide to help you evaluate and learn about our products and tools. If you plan to use the BA Suite for development or production, consider distributing components across server and workstation computers. One popular configuration is to install the servers on one computer and the design tools on client workstations, according to analyst requirements. DI Plugins that are needed at design and runtime should be installed on the server and on client workstations.

Select Installation Method

To determine the best installation method for you, answer several questions.

- Why do you want to install Pentaho BA Suite? Do you want to evaluate it or develop solutions? Do you want to run it in a production environment?
- Do you want to house the BA Repository on the PostgreSQL database that Pentaho supplies? Or would you rather house the BA Repository on another database that you supply such as Oracle or MySQL? The Pentaho BA Suite contains the BA Repository, which stores schedule, report, and other data needed for Pentaho to run properly. The Pentaho BA Suite is configured so that the BA Repository runs on PostgreSQL. The database that houses the BA Repository is different than the database that houses your data.
- The Pentaho BA Suite is configured so that the BA Server is deployed on the Tomcat web application server by default. Do you want to run the BA Server on the version of Tomcat that we supply? Or do you want to deploy the BA Server on your own implementation of Tomcat? Would you prefer to deploy the BA Server on JBoss instead?

As you consider these questions, review the Installation Decision Table to determine the best installation method for you.

Table 3: Pentaho BA Suite and BA Components Installation Decision Table

Explore Considerations	Choose the Best Option For You			
	Install All Components	*Install with Your Own BA Repository*	*Use Manual BA Server Installation*	*Install Only BA Tools*
Summary	**This method installs both BA and DI components.** This method steps you through the process of choosing which Pentaho components to install. It uses an installation wizard and is the quickest and easiest installation option, and includes everything you need to run Pentaho BA Suite.	**This method installs BA components only.** It requires that you download and install Pentaho installation files. You can choose the BA Repository database that you want to use, but you must download and install it yourself. Consider using this method if your company has a standard database platform with which you must comply.	**This method installs BA components only.** The manual method requires that you download and install Pentaho installation files. You can choose your web application server and BA Repository database, but you must download and install them yourself. Consider using this method if your company has a standard database platform or web application server with which you must comply.	**This method installs BA Design Tools only**. Use this method if you want to install the design tools only, not the BA Server. This method is often used to install design tools on client workstations.
Installed Components	When you run the installation wizard, you can choose to install some or all of the components in the Pentaho BA Suite. • Servers: BA Server and DI Server. • BA Design Tools and Plugins: Report Designer, Schema Workbench, Metadata Editor, Aggregation Designer, Dashboard, Spoon (with Instaview), Pan, Kitchen, and Carte. • Plugins: All BA Plugins such as Pentaho Mobile, Analyzer, Interactive Reporting and Some DI Plugins such as Big Data and Marketplace.	This method installs these things. • Server: BA Server. • BA Design Tools and Plugins: Report Designer, Schema Workbench, Metadata Editor, Aggregation Designer, Dashboard and All BA Plugins such as Pentaho Mobile, Analyzer, and Interactive Reporting.	This method installs these things. • Server: BA Server. • Plugins: All BA Plugins including Analyzer, Mobile, and Interactive Reporting.	This method installs these things. • BA Design Tools: Report Designer, Schema Workbench, Metadata Editor, Aggregation Designer, and Dashboard.

Explore Considerations	Choose the Best Option For You			
	Install All Components	*Install with Your Own BA Repository*	*Use Manual BA Server Installation*	*Install Only BA Tools*
You Supply	You need to supply a computer that meets Pentaho's *operating system and hardware requirements*.	You need to supply these things. Each item must meet or exceed the requirements in the *supported technologies* matrix. • Computer with a supported operating system and hardware configuration. • Oracle Java Runtime Environment (JRE) or Oracle Java Development Kit (JDK). • BA Repository Database (PostgreSQL, MySQL, or Oracle). • BA Repository Database JDBC Drivers (PostgreSQL, MySQL, or Oracle).	You need to supply these things. Each item must meet or exceed the requirements in the *supported technologies* matrix. • Computer with a supported operating system and hardware configuration. • Oracle Java Runtime Environment (JRE) or Oracle Java Development Kit (JDK) • Repository Database (PostgreSQL, MySQL, or Oracle) You can also use an preexisting BA Repository platform if it is compatible with the supported technologies matrix. • BA Repository Database JDBC Drivers (PostgreSQL, MySQL, or Oracle) • Web Application Server (JBoss or Tomcat). You can also use an preexisting application server if it is compatible with the supported technologies matrix.	You need to supply a computer that meets Pentaho's *operating system and hardware requirements*.
We Supply	We supply these things. • Installation Package • Oracle JRE • Repository Platform (PostgreSQL)	We supply these things. • Installation Package • Web Application Server (Tomcat)	We supply the Installation Package.	We supply the Installation Package.

Explore Considerations	Choose the Best Option For You			
	Install All Components	*Install with Your Own BA Repository*	*Use Manual BA Server Installation*	*Install Only BA Tools*
	• Repository Platform JDBC Driver (PostgreSQL) • Web Application Server (Tomcat)			
Technologies Used	These technologies are used in this installation method. • Tomcat • PostgreSQL	These technologies are used in this installation method. • Tomcat • PostgreSQL, MySQL, or Oracle	These technologies are used in this installation method. • Tomcat or JBoss • PostgreSQL, MySQL, or Oracle	• N/A
Expertise	You need this knowledge to perform this type of installation. • Basic computer knowledge.	You need this knowledge to perform this type of installation. • Knowledge of your networking environment, including database port numbers if they differ from the default and IP addresses. • Permission to access installation directories. • Root or Administrative access.	You need this knowledge to perform this type of installation. • Knowledge of your networking environment, including database port numbers if they differ from the default and IP addresses. • Permission to access installation directories. • Root or Administrative access.	You need this knowledge to perform this type of installation. • Basic computer knowledge.
Time	Approximately 30 minutes.	Approximately 60 - 90 minutes.	Approximately 2 - 3 hours.	Approximately 5 - 10 minutes.
Availability	Download this software from the *Pentaho website* or the *Pentaho Support Portal*.	Download this software from the *Pentaho Support Portal*.	Download this software from the *Pentaho Support Portal*.	Download this software from the *Pentaho Support Portal*.
Recommendation	**Use for the Pentaho Trial Download or if you want to Evaluate the Pentaho BA Suite. Suitable for Rapid Development and Production use.**	**Suitable for Rapid Development and Production use.**	**Suitable for Rapid Development and Production use.**	**Suitable for Rapid Development use.**

Next Steps

Now that you are familiar with the different installation methods, you are ready to install the Pentaho BA Suite.

• *Install All Components*

- *Install with Your Own BA Repository*
- *Use Manual BA Server Installation*
- *Install Only BA Tools*

If you need installation help, contact *Pentaho support*.