



Administer BA Server



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Introduction

This section contains a variety of instructions for post-install configuration and maintenance tasks for the Pentaho Business Analytics (BA) Server and related tools. You can do these tasks in any order that you want, because the operation of the BA Server is not dependant on doing these tasks in order.

Prerequisites

Before you do any of these tasks, you must have [installed](#) the Pentaho software and [configured](#) the BA Server.

Expertise

The topics covered in this section are written for IT administrators who know where data is stored, how to connect to it, details about the computing environment, and how to use the command line interface for Windows or Linux.

Tools

We provide a web application, the User Console, which you use to perform many administration tasks.

Login Credentials

All of the tasks in this section, as well as those that use the User Console, **Administration** page, require that you [log on to the User Console](#) with the administrator user name and password.

Manage Schedules

As an administrator, you may create, run, delete, stop, edit, or resume schedules through the **Schedules** page in the User Console. After a report is scheduled by any user, an admin may edit, pause, or delete that schedule, as well as change the frequency of the report, change parameters, or adjust email settings. To distribute reports using email, make sure you have configured the [email server](#). You also have the ability to prevent users from scheduling specific files or reports.

You might need to control when schedules can run, by setting up periods of time to forbid schedules. This allows you to perform administrative functions, such as system maintenance or managing server traffic during peak usage times.

These sections explain how to navigate the **Schedules** page, how to use the page to create, edit, and delete schedules, and describe reference data on the Quartz Cron engine for scheduling.

- [Schedules](#)
- [About Scheduling Reports](#)
- [Quartz Cron Attributes](#)

These sections explain how an administrator can prevent scheduling of specific files, prevent scheduling during specific times, and schedule deletion of old content.

- [Prevent Scheduling of a Single Report or File](#)
- [Prevent Scheduling by Setting Blockout Times](#)
- [Schedule Deletion of Generated Files](#)

Prevent Scheduling of a Single Report or File

All new reports are enabled for scheduling by default, but as an administrator, you can control which files can be scheduled to run.

1. From the User Console **Home** menu, click **Browse Files**.
The **Browse Files** page appears.
2. Browse to the location of a report from the **Browse** pane on the left of the **Browse Files** page.
The **Files** pane in the center populates with a list of reports.
3. Click to select the report for which you want to deny scheduling, then click **Properties** in the **Folder Actions** pane.
The **Properties** window for that report appears.
4. Click the **General** tab in the **Properties** window, then disable the box next to **Allow Scheduling**.
5. Click **OK**.

Users are no longer able to see the **Schedule** option next to this report and the report is not able to be scheduled.

Prevent Scheduling by Setting Blockout Times

Specific times can be designated on the server to block the running of schedules. This allows you to perform administrative functions such as system maintenance or managing server traffic during peak usage times.

1. From the User Console **Home** menu, click **Schedules**.
The **Schedules** page appears.

Blockout Times			
All schedules will be blocked out during the following times:			
			+ ✎ ✕
Starts	Ends	Repeats	Repeats End By
Fri, Jul 19 1:00 AM	Sat, Jul 20 2:00 AM	Every Saturday at 01:00:00	Never
Fri, Jul 19 1:00 AM	Sun, Aug 04 3:00 AM	The first Sunday of every month	Never

- Click the **Create Blockout Time** button or the green + in the **Blockout Times** widget on the left side of the **Schedules** screen.

The **Blockout Time** dialog box appears.

New Schedule Blockout Time

Recurrence:

Run Once ▼

Start Time

01 ▼ 00 ▼ AM ▼ Greenwich Mean Time (UTC+0000) ▼

Ends

☒ Duration ☐ End Time

0 ▼ day(s) 0 ▼ hour(s) 0 ▼ minute(s)

Start Date

2013-06-05

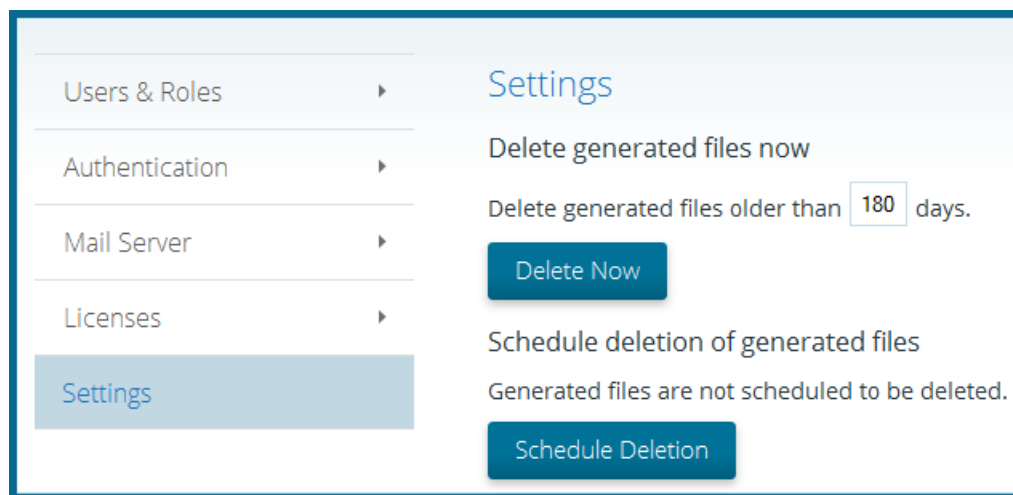
OK Cancel

- Choose a **Recurrence**, **Start Time**, **Duration** or **End Time**, and a **Start Date** for the blocked out time using the available fields.
- Click **OK**.
If **Run Once** is chosen as the **Recurrence**, a dash shows under the Start Times and End Time fields in the blockout list, until the blockout time passes.

The **Blockout Time** is created and no schedules will run on the BA Server during that time. Users are able to view a list of blocked out times when they are creating schedules.

Schedule Deletion of Generated Files

As an administrator, you may want to delete older generated files or content in order to free up space in the BA Repository.



1. Click on **Administration** in the drop-down menu on the upper right, then click on **Settings**.
The **Settings** interface appears.
2. To manually delete generated files now, confirm the age of the files to be deleted, then press **Delete Now**.
The generated files older than the specified age are deleted.
3. To schedule regular deletion of generated files, press **Schedule Deletion**.
The **Schedule Deletion** window appears.
4. Enter an age for the generated files in the field specifying number of days.
5. Choose a time interval for the schedule from the **Recurrence** list.
6. Choose a **Start Time** and a **Recurrence Pattern**, as well as **Start** and **End Dates** for the scheduled deletion. Click **OK**.

The **Deletion Schedule** is created and the generated files older than the specified age are deleted during the scheduled times.

Upload and Download from the BA Repository

Uploading and downloading from the BA Repository is done with the User Console or the command line interface. The ability to upload and download assumes that you have already created a data source, that data content exists to be pushed, and defines permissions for the repository.

For uploading, any starting location can be selected. Permission settings are inherited through the folder structure if the destination location has existing permission settings. It is advisable to keep existing security settings as defaults for the upload. Uploading more than one file or folder requires the files to be zipped before beginning the upload.

For downloading, you are able to select the destination location for the downloaded file or folder. The download process always creates a .zip file that includes a manifest file along with the downloaded content. The manifest file contains the collection of permissions settings for the downloaded files and folders and is found in the root directory of the .zip file.

- [Upload Folders and Files](#)
- [Upload from the Command Line](#)
- [Download Folders and Files](#)
- [Download from the Command Line](#)

Supported File Types	Hidden File Types
These are the supported file types and artifacts for uploading and downloading from the BA Repository.	These are the file types that are hidden by default in the BA Repository.
<ul style="list-style-type: none"> • Reporting (.prpt, .prpti, .xml) • Analyzer (.xanalyzer) • Dashboards (.xdash) • Solution Files (.xaction, .locale) 	<ul style="list-style-type: none"> • Web (.html, .htm) • Reporting (.xml) • Solution Files (.properties) • Graphics (.png, .jpg, .gif, .svg)

Upload Folders and Files

The User Console can be used to upload files and folders to the BA Repository.

1. From the User Console **Home**, click **Browse Files**.

The **Browse Files** page appears.

2. From the **Browse** pane on the left, click to choose the destination folder for the upload.

3. With the destination folder highlighted, click **Upload** in the **Folder Actions** pane on the right.

The **Upload** dialog box appears.

4. Browse to the file or folder to be uploaded by clicking **Browse**.

5. Click **OK** to begin upload using the default settings.

6. Choose preferences for the upload by clicking to expand the **Advanced Options** menu.

a) Choose **Replace the Existing File**(default) or **Do Not Upload** from the first menu.

b) Choose **File Permissions** from the second menu. The choices are **Do Not Change Permissions** (default), **Retain Permissions on the Uploaded File**, or **Remove All Permissions**.

c) Choose **File Ownership** by selecting **Do Not Change Owner** (default) or **Set Owner Based on Uploaded File** from the third menu.

d) Choose **None** (default), **Short**, or **Verbose** from the Logging menu.

7. Click **OK**.

The upload runs and the files or folders are uploaded to the repository. If the upload fails, an error log window opens with specific information.

Upload from the Command Line

1. Open the command line interface by clicking **Start** and typing **cmd**. Press **Enter**.

2. From the command line interface, go to the location where you have a local copy of Biserver-EE installed, such as `C:/dev/pentaho/biserver-ee`.

3. Enter a space, then type the arguments for upload into the command line interface. A completed upload argument would look something like this:

```
import-export.bat --import --url=http://localhost:8080/pentaho --username=dvader
--password=password --source=file-system --type=files --charset=UTF-8 --path=/
public--file-path=C:/Users/dvader/Downloads/pentaho-solutions.zip --overwrite=true --
permission=true -retainOwnership=true
```

4. Press **Enter** after the arguments are typed.

The upload process runs and the results are displayed in the command interface. If an argument is required for successful upload and has not been provided, the missing requirement is displayed in the command interface.

Table 1: Glossary of Upload Arguments for the Command Line Utility

Command	Description	Values	Required
-i,--import	Upload command	n/a	Yes
-a,--url <arg>	URL of the repository (for example, <code>http://localhost:8080/pentaho</code>).	URL	Yes
-c,--charset <arg>	Charset to use for the repository. Characters from external systems are converted to this charset	UTF-8 (default)	No
-f,--path <arg>	Repository path to which the uploaded files are added (for example, <code>/public</code>)	File path	Yes
-h,--help	Prints this message	n/a	No
-p,--password <arg>	Repository password	Alphanumeric	Yes
-u,--username <arg>	Repository username	Alphanumeric	Yes
-x,--source <arg>	External system type	legacy-db or file-system (default)	Yes
-o , --overwrite <arg>	Overwrites file(s) on upload. Default value is True.	Boolean	No
-perm, --permission <arg>	Applies ACL using manifest file. Default value is True.	Boolean	No
-r, --retainOwnership	Replaces the file ownership upon upload with the ownership of the original download. Default value is True.	Boolean	No
-l, --logfile <arg>	Path to local file system with name of file to write	File path	No

Command	Description	Values	Required
-t, --type <arg>	The type of content being uploaded - files (default), metadata.	File type	No

Download Folders and Files

Downloading folders and files can be done through the User Console or through the command line interface. The download process always creates a .zip file that includes a manifest file along with the downloaded content. The manifest file is a collection of the permissions settings for the downloaded files and folders and is found in the root directory of the .zip file.

Download a Folder

1. From the User Console **Home**, click **Browse Files**.
The **Browse Files** page appears.
2. From the **Browse** pane on the left, browse to the location of the folder to be downloaded.
3. With the folder highlighted, click **Download** in the **Folder Actions** pane on the right.
4. Choose **Save File** in the window that appears, and click **OK**.

The folder is saved as a .zip file with the manifest located in the top level of the file.

Download a File

1. From the User Console **Home**, click **Browse Files**.
The **Browse Files** page appears.
2. Browse to the location of the file by clicking through the folders in the **Browse** pane on the left.
The **Files** pane in the center populates with a list of reports.
3. Click to select the file in the **Files** pane and choose **Download** in the **Folder Actions** pane on the right.
4. Choose **Save File** in the window that appears, and click **OK**.

The file is saved as a .zip file with the manifest located in the top level of the file.

Download from the Command Line

1. Open the command line interface by clicking **Start** and typing **cmd**. Press **Enter**.
2. From the command line interface, go to the location where you have a local copy of Biserver-EE installed, such as `C:/dev/pentaho/biserver-ee`.
3. Enter a space, then type the arguments for download into the command line interface. A completed download argument would look something like this:

```
import-export.bat --export --url=http://localhost:8080/pentaho --username=dvader --password=password --file-path=c:/temp/reports.zip --charset=UTF-8 --path=/public/pentaho-solutions/steel-wheels/reports --withManifest=true --logfile=c:/temp/output.txt
```
4. Press **Enter** after the arguments are typed.

The download process runs and the results are displayed in the command interface. The file is saved as a .zip file with the download manifest located in the top level of the file. If an argument is required for successful download and has not been provided, the missing requirement is displayed in the command interface.

Table 2: Glossary of Download Arguments for the Command Line Utility

Command	Description	Values	Required
-e, --export	Download command	n/a	Yes
-a, --url <arg>	URL of repository (for example, http://localhost:8080/pentaho)	URL	Yes
-c, --charset <arg>	Charset to use for the repository. Characters from external systems are converted to this charset.	UTF-8 (default)	No
-h, --help	Prints this message.	n/a	No
-f, --path <arg>	Repository path to which the uploaded files are added (for example, /public)	File path	Yes
-p, --password <arg>	Repository password	Alphanumeric	Yes
-fp, --filepath <arg>	Location that the zip file is downloaded to	File path	Yes
-u, --username <arg>	Repository username	Alphanumeric	Yes
-l, --logfile <arg>	Path to local file system with name of file to write	File path	No
-w, --withManifest <arg>	If true, includes Manifest.xml inside zip. If false, download excludes this file.	Boolean	No

Localize Folders and Reports

You can localize the names and descriptions for reports and folders that appear in the User Console. Localization is helpful if your co-workers work in different countries and speak different languages, but use the console to access the same reports and folders. For example, localization allows German speakers to view report names in German and Americans to view the same report names in English.

Localization information is stored in the BA Repository, along with other report and folder information. Typically, to localize names and descriptions of reports and folders you do three things.

- Download the report or folder from the BA Repository. Localization information is stored in one or more text files that have the **.locale** extension.
- Add or edit the localization files downloaded with the reports or folders.
- Re-upload the report or folder, along with the localization files, into the BA Repository.

These sections explain how to set up default localization, localize report and folder information, and edit existing localization information.

- [Set Up Default Localization Information for Reports and Folders](#)
- [Localize Report and Folder Information for Different Languages](#)
- [Edit Existing Localization Information for Reports and Folders](#)

If you want to create or add a Pentaho localization file, but are unfamiliar with its structure, we recommend that you read [Localization File Structure](#) first.

Localization File Structure

When you download a report or folder from the BA Repository, localization information is stored in a text file that has a `.locale` extension. You add or edit localization files, but must upload them to the BA Repository for the changes to appear in the User Console.

Each report and folder that appears in the console should have a default localization file associated with it. The default localization file should indicate the name that appears when you view the name of the report or folder in the console. Optionally, the localization file can contain the report description. The report description appears when you hover the mouse pointer over the report or folder name in the console.

If multiple localization files are present, the User Console displays the localization information contained in them if you set the language indicated in the localization file as the default in the console or in your web browser. Otherwise, the information in the default localization file is displayed instead.

Localization information appears in two places in a localization file: in the file name and in variables inside the file.

Localization File Names

Localization file names consist of several parts that are joined by underscores. This is an example of a localization file name for a folder: `index_es_PA.locale`

In folder localization, file names the word `index` appears first, as in the previous example. If the localization file is for a report, the name of the report appears instead of `index`, like this: `Inventory Report_es_PA.prpt.locale`

The second and third parts of the file name indicate the two-letter language code and the two-letter country code. Language codes adhere to ISO 639-1; country codes can be found in ISO-3166. In the previous example, `es` is the language code for Spanish and `PA` is the country code for Panama. A list of often-used language and country codes appears [here](#).



Note: Although rarely used, the dialect code can appear after the country code.

File extensions, which appear after the period, indicate the report type and end with `.locale`. In the previous example `prpt` indicates the report type.

Language, country, and dialect codes are optional parts of file names. The report type extension should not be included in folder localization file names. Only the report name (or the word `index` for folders) is required as is the `.locale` extension. But, if a country code is present, the language code must also be present, and if a dialect code is present, both the language and country codes must be present.

If a localization file name contains no language, country, or dialect code, the console assumes that the file is the default for a report or folder. A default localization file name for a folder looks like this: `index.locale`.


Localization Variables

Localization files have at least two variables that contain localization information.

- **file.title** holds the name of the report or folder that appears in the User Console.
- **file.description** holds the text for the Tool Tip that appears when you hover the mouse pointer over the report or folder name in the User Console.


Here is an example of a localization file for a report.

```
#Locale = es
#Wed Apr 17 13:55:53 EDT 2013
file.title=Inventario Region 23
file.description=Lista del inventario de la región 23
```

 **Note:** In localization `.properties` files, **file.name** and **file.url-name** are sometimes used instead of **file.title** and **url-description** is sometimes used instead of the file description.

Before variable values set in the localization file can be displayed, you must adjust either the User Console or your web browser's language so that it matches the localization file's language. You must also upload the localization file into the BA Repository along with the other report files.

Using the previous example, the User Console displays the value of **file.title** (**Inventario Region 23**) when you open it. If you hover the mouse pointer over the report name in the console, a Tool Tip appears that displays the value of **file.description** (**Lista del inventario de la region 23**).

 **Note:** Unicode can be used to display non-Latin languages, such as Chinese or Japanese.

Popularly Used Country and Location Codes

Language and country codes that are used to construct localization file names appear in standards ISO 639-1 and ISO 3166. Here is a list of popularly used language and country codes.

Table 3: Popularly Used Country and Location Codes

Language	Language Code	Country	Country Code
Chinese	zh	China	CN
Dutch	nl	Netherlands	NL
French	fr	France	FR
German	de	Germany	DE
Italian	it	Italy	IT
Japanese	ja	Japan	JP
Korean	ko	Republic of Korea	KR
Portuguese	pt	Brazil	BR
Portuguese	pt	Portugal	PT
Spanish	es	Argentina	AR
Spanish	es	Spain	ES

Set Up Default Localization Information for Reports and Folders

Complete these steps if you want to set up default localization information.

1. Download the report or folder to which you want to add localization information. Instructions appear in [Download Folders and Files](#).
2. Unzip the downloaded report or folder, then determine whether a default localization file already exists. Localization files have a .locale extension and are named either `index.locale` (for folders) or `<report name>.<report type>.locale` for reports. If a default localization file exists you do not need to continue with these steps.
3. To add new localization information, you must create a default localization file. Localization file names follow very specific naming conventions. To determine the name of the new localization file, do this.
 - a) For folders, the default localization file name convention is `index.locale`.
 - b) For reports, the default localization file name convention is `<report name>.<report type>.locale`. An example of a valid file name is `Inventory Report.prpt.locale`.
4. Use a text editor to create a blank localization file that has the file name you constructed in the previous step, then save the file in the directory of the folder or report.
5. Type the following in the blank file.

```
#Localization File
file.title=
file.description=
```

6. Type the name of the report or folder that you want to appear in the User Console after the **file.title** variable. Type the name of the report or folder exactly as you want it to appear.
Example: `file.title=Inventario`
7. Type the description for the report or folder after the `file.description` variable. The value of the **file.description** appears when you hover the mouse pointer over the report or folder name in the console. Type the description exactly as you want it to appear.
Example: `file.description=Inventario para El Rey`
8. Save and close the file.
9. Upload the localization file along with other report or folder files into the BA Repository. Instructions for how to do this appear in [Upload Folders and Files](#).

Localize Report and Folder Information for Additional Languages

Complete these steps if you want to display report and folder names and descriptions in a language other than the default. If you want to change the default language displayed only, we recommend that you [edit the default locale file](#).

1. Download the report or folder to which you want to add localization information. Instructions appear in [Download Folders and Files](#).
2. Unzip the downloaded report or folder.
3. To add new localization information, you must create a new localization file. Localization file names follow very specific naming conventions. You can optionally specify country and language codes, as well as the report type. To determine the name of the new localization file, do this.
 - a) For folders, the localization file name convention is `index_<language code>_<country code>.locale`. An example of a valid file name is `index_es_PA.locale`. Note that the language and country codes are optional.
 - b) For reports, the localization file name convention is `<report name>_<language code>_<country code>.<report type>.locale`. An example of a valid file name is `Inventory Report_es_PA.prpt.locale`. Note that the language and country codes are optional.
4. Use a text editor to create a blank localization file that has the file name you constructed in the previous step, then save the file in the directory of the folder or report.
5. Type the following in the blank file.

```
#Localization File
file.title=
file.description=
```

6. Type the name of the report or folder that you want to appear in the User Console after the **file.title** variable. Type the name of the report or folder exactly as you want it to appear.
Example: `file.title=Inventario`

7. Type the description for the report or folder after the `file.description` variable. The value of the **file.description** appears when you hover the mouse pointer over the report or folder name in the console. Type the description exactly as you want it to appear.
Example: `file.description=Inventario para El Rey`
8. Save and close the file.
9. Upload the localization file along with other report or folder files into the BA Repository. Instructions for how to do this appear in [Upload Folders and Files](#).

Edit Existing Localization Information for Reports or Folders

Complete these steps if you want to edit localization information for report and folder names and descriptions that appear in the User Console.

1. Download the report or folder for which you want to edit localization information. Instructions for how to do this appear in [Download Folders and Files](#).
2. Unzip the downloaded report or folder.
3. Use a text editor to open the localization file you want to modify. Localization files have the `.local` extension. Localization files for folders begin with the word `index`. Localization files for reports begin with the report name.
4. To change the report or folder name that appears in the console, edit the **file.title** text.
Example: `file.title=Inventario`
5. To change the report or folder description Tool Tip that appears when you hover the mouse pointer over the report or folder name in the console, edit the value of the **file.description** variable.
Example: `file.description=Inventario para El Rey`
6. Save and close the file.
7. Re-upload the localization file, along with the other report or folder files, into the BA Repository. Instructions for how to do this appear in [Upload Folders and Files](#).

Manage Pentaho License Keys from the Command Line

Although the [Administration](#) page of the User Console is the quickest, easiest, and most comprehensive way to manage the BA Server, you may be in environments where it is difficult or impossible to deploy or use the console. See the alternative instructions for [command line interface \(CLI\) license](#) registration for step-by-step instructions.

To ensure that the BA Server and DI Server use the same location to store and retrieve Pentaho licenses, you must create a **PENTAHO_INSTALLED_LICENSE_PATH** system variable for your **pentaho** user account. If you do not set this variable, the User Console and the command line license installation script will store license data in a place that the DI Server and BA Server will not look.

It does not matter what you set this location to; however, it needs to be available to the user account(s) that run the User Console and the BA and DI Server.

- [Set the License Path Variable on Linux](#)
- [Set the License Path Variable on Windows](#)
- [Install or Update License Keys from the Command Line](#)
- [List or Remove License Keys from the Command Line](#)

Set the License Path Variable on Linux

1. Edit your **/etc/environment** file with a text editor.
If you're using Solaris, you will have to set this environment variable through whatever means are available to you.
2. Add this line in a convenient place (changing the path as explained above, if necessary): **export PENTAHO_INSTALLED_LICENSE_PATH=/home/pentaho/.installedLicenses.xml**.
3. You must log out and log back into the operating system for the change to take effect.
4. Verify that the variable is properly set.

```
env | grep PENTAHO_INSTALLED_LICENSE_PATH
```

The PENTAHO_INSTALLED_LICENSE_PATH variable is now set.

Set the License Path Variable on Windows

1. In **Windows 2008 Server**, right-click on **Computer**, then select **Properties** from context menu, then click **Advanced System Settings**.
The **System Properties** window will come up.
2. In the System Properties window, click the **Advanced** tab, then click **Environment Variables**.
3. In the System Variable section, click **New**.
4. A popup dialog will ask for a variable name and value. Type **PENTAHO_INSTALLED_LICENSE_PATH** into the name field, and the directory you intend to install licenses to plus **.installedLicenses.xml** in the value field, then click **OK**.

```
C:/pentaho/.installedLicenses.xml
```

5. In the parent window, click **Apply Changes**.
6. You must restart your computer for the change to take effect.
7. Verify that the variable is properly set.

```
echo %PENTAHO_INSTALLED_LICENSE_PATH%
```

The PENTAHO_INSTALLED_LICENSE_PATH variable is now set.

If you run Tomcat automatically as a Windows service, you must also configure it to run on the Windows user account where the **.installedLicenses.xml** file is located.

Install or Update License Keys from the Command Line

1. Download the .lic file you want to install.
2. Navigate to the `/license-installer/` directory.
3. Copy your .lic files to the `/license-installer/` directory.
4. Run the license installation script.
 - a) **Linux:** Run `install_license.sh` with the `install` switch and the location and name of your .lic file as a parameter. You can specify multiple .lic files separated by spaces. Be sure to use backslashes to escape any spaces in the path or file name.

```
./install_license.sh install Pentaho\ BI\ Platform\ Enterprise\ Edition.lic
```

- b) **Windows:** Run `install_license.bat` with the `install` switch and the location and name of your license file as a parameter.

```
install_license.bat install "C:/Users/dvader/Downloads/Pentaho BA Platform  
Enterprise Edition.lic"
```

List or Remove License Keys from the Command Line

To list or remove Pentaho keys in the command line interface, follow the below instructions.

1. Navigate to the `/pentaho/server/license-installer/` directory.
2. Run the **install_license.bat** (on Windows) or **./install_license.sh** (on Linux) script with the **display** switch.

```
Windows: install_license.sh display
```

```
Linux: ./install_license.sh display
```

If you have installed any Enterprise Edition keys, a list of them will appear, along with the products they cover and the duration of the license.

3. To remove a license, run the same script with the **uninstall** switch.

```
Windows: install_license.sh uninstall
```

```
Linux: ./install_license.sh uninstall
```

A list of installed licenses will appear, followed by a prompt for the license ID you would like to remove. If you press **Enter** at this prompt, it will exit without taking any action.

4. Type in the license ID number that you want to remove, then press **Enter**.

After removing a key, if you had more than one installed, the list will regenerate and the prompt will reappear. You can choose to remove another license key, or you can press **Enter** to exit the script.

If you would prefer not to be prompted for confirmation, or if you intend to call this program as part of a script, use the **-q** switch to suppress prompting.

Maintain the BA Server Manually

The BA Server has options that must be set manually, outside of the [Administration](#) page of the User Console. You can do any or all of these tasks depending on your needs.

- [Disable Home Page Widgets](#)
- [Remove Sample Data from the BA Server](#)
- [Enable JPivot in the User Console](#)
- [Change the Location of the Server Log File](#)
- [Increase the CSV File Upload Limit](#)
- [Change the Staging Database for CSV Files](#)
- [Change the Port Numbers for the BA Server](#)
- [Change the Web Application Name or Port](#)

Disable Home Page Widgets

The default console **Home** page contains the **Getting Started** widget, which has easy instructions and tutorials for evaluators. The directions below show you how to hide not only the **Getting Started** widget, but also other **Home** page widgets, as needed.

1. Shut down the BA Server if it is currently running.
2. If you have not deployed yet, navigate to the `/pentaho-platform/user-console/source/org/pentaho/mantle/home/properties/config.properties` file.
3. If you have manually deployed and want to hide widgets at a later time, navigate to `biserver-ee/tomcat/webapps/pentaho/mantle/home/properties/config.properties` file.
4. Find the line that starts with `disabled-widgets=` and type in the ID of the widget `getting-started`. You can also disable the **Recents** and **Favorites** widgets using the same method.

```
disabled-widgets=getting-started,recents,favorites
```

5. Start the BA Server and login to the User Console.

You now have a **Home** page that is scrubbed of the specified widget(s).

Remove Sample Data from the BA Server

By default, Pentaho provides a sample data source and a solution directory filled with example content. These samples are provided for evaluation and testing. Once you are ready to move from an evaluation or testing scenario to development or production, you can remove the sample content. Follow the instructions below to completely remove the Pentaho sample data and solutions.

1. Stop the BA Server.
2. Delete the **sample-data.zip** from the `/pentaho/server/biserver-ee/pentaho-solutions/system` directory.
3. Edit the `/pentaho/WEB-INF/web.xml` file inside of the deployed `pentaho.war`.

As laid down by the Pentaho graphical installer and archive packages, this path should be `/pentaho/server/biserver-ee/tomcat/webapps/pentaho/WEB-INF/web.xml`. If you performed a manual WAR build and deployment, then you must adjust the path to fit your configuration.

4. Remove the **hsqldb-databases** section from the `/pentaho/WEB-INF/web.xml` file:

```
<!-- [BEGIN HSQLDB DATABASES] -->
  <context-param>
    <param-name>hsqldb-databases</param-name>
    <param-value>sampladata@../../data/hsqldb/sampladata</param-value>
  </context-param>
<!-- [END HSQLDB DATABASES] -->
```

5. Remove the **SystemStatusFilter**:



Note: This is not part of the Pentaho samples; it provides error status messages that are only useful for development and testing purposes, and should be removed from a production system.

```
<filter>
  <filter-name>SystemStatusFilter</filter-name>
  <filter-class>com.pentaho.ui.servlet.SystemStatusFilter</filter-class>
  <init-param>
    <param-name>initFailurePage</param-name>
    <param-value>InitFailure</param-value>
    <description>This page is displayed if the PentahoSystem fails to properly
initialize.</description>
  </init-param>
</filter>
```

6. Remove the filter mapping for the **SystemStatusFilter**:

```
<filter-mapping>
  <filter-name>SystemStatusFilter</filter-name>
  <url-pattern>/*</url-pattern>
</filter-mapping>
```

7. Save and close the **web.xml** file.

8. Delete the `/pentaho/server/biserver-ee/data/` directory.

This directory contains a sample database, control scripts for that database and the environment settings it needs to run, and SQL scripts to initialize a new repository.

9. Restart the BA Server.

10. [Log on to the User Console](#) with the administrator user name and password and go to the **Browse Files** page.

- In the **Folders** pane, expand the **Public** folder and click to highlight the folder containing the **Steel Wheels** sample data. Click **Move to Trash** in the **Folder Actions** pane and confirm the deletion.
- Highlight the folder containing the **Pentaho Operations Mart** sample data. Click **Move to Trash** in the **Folder Actions** pane and confirm the deletion.

Your BA Server instance is now cleaned of samples and development/testing pieces, and is streamlined for production.

Enable JPivot in the User Console

We recommend that you use Pentaho Analyzer for analytic reporting. However, you can enable JPivot on the BA Server if you need to by following these steps.

- Shut down the BA Server if it is currently running.
- Navigate to `/pentaho/server/biserver-ee/pentaho-solutions/system/pentaho-jpivot-plugin-legacy/plugin.xml` file and delete file.
- Rename the file called `/pentaho/server/biserver-ee/pentaho-solutions/system/pentaho-jpivot-plugin-legacy/plugin.xml.enabled` to `/pentaho/server/biserver-ee/pentaho-solutions/system/pentaho-jpivot-plugin-legacy/plugin.xml` and save it.

You can either turn off the deprecation message for JPivot, or restart the BA Server at this point.

Turn Off Deprecation Message for JPivot - Optional

- Shut down the BA Server if it is currently running.
- Navigate to the `/pentaho-solutions/system/pentaho-jpivot-plugin-legacy/settings.xml` and open the file.
- Change the Boolean value as shown and save the file.

From:

```
<show-deprecation-warning>true</show-deprecation-warning>
```

To:

```
<show-deprecation-warning>>false</show-deprecation-warning>
```

7. Restart the BA Server.

The JPivot plug-in is enabled in the User Console and the deprecation message is turned off.

Change the Location of the Server Log File

Windows

If you used the install wizard to install Pentaho Business Analytics, the pentaho.log is written to the C:/WINDOWS/system32 directory. To change the location of the pentaho.log file, you must edit the log4j.xml available at /pentaho/server/biserver-ee/tomcat/webapps/pentaho/WEB-INF/classes/.

Modify the location as shown in the sample below using the appropriate path to your installation of Pentaho Business Analytics.

```
<param name="File" value="C:/Program Files/pentaho/server/biserver-ee/logs/
pentaho.log"/>
<param name="Append" value="true"/>
```

Linux

If you are using Linux, the log4j.ml file is found at /home/pentaho/pentaho/server/biserver-ee/tomcat/webapps/pentaho/WEB-INF/classes/.

Modify the location as shown in the sample below using the appropriate path to your installation of Pentaho Business Analytics.

```
<param name="File" value="/home/pentaho/server/biserver-ee/logs/pentaho.log"/>
<param name="Append" value="true"/>
```

Increase the CSV File Upload Limit

You may find that you need to increase the size of the upload limit for your CSV files. These steps guide you through this process.

1. Go to ... \biserver-ee\pentaho-solutions\system and open the **pentaho.xml** file.
2. Edit the XML as needed; (sizes are measured in bytes):

```
<file-upload-defaults>
  <relative-path>/system/metadata/csvfiles/</relative-path>

  <!-- max-file-limit is the maximum file size, in bytes, to allow to be
  uploaded to the server -->
  <max-file-limit>10000000</max-file-limit>

  <!-- max-folder-limit is the maximum combined size of all files in the upload
  folder, in bytes. -->
  <max-folder-limit>500000000</max-folder-limit>

</file-upload-defaults>
```

3. Save your changes to the file.
4. In the **User Console**, go to **Tools > Refresh System Settings** to ensure that the change is implemented.
5. Restart the User Console.

Change the Staging Database for CSV Files

Hibernate is the default staging database for CSV files. Follow these instructions if you want to change the staging database.

1. Go to ... \pentaho-solutions\system\data-access and open **settings.xml**.

2. Edit the settings.xml file as needed. The default value is shown in the sample below.

```
<!-- settings for Agile Data Access -->
<data-access-staging-jndi>hibernate</data-access-staging-jndi>
```

This value can be a JNDI name or the name of a [Pentaho Database Connection](#).

3. Save your changes to the **settings.xml** file.
4. Restart the User Console.

Change the Port Numbers for the BA Server

Follow the instructions below to change the port through which the BA Server runs:

1. Navigate to the `/pentaho/server/biserver-ee/tomcat/conf/`
2. Edit the **server.xml** file found there, and search for **Define a non-SSL HTTP/1.1 Connector**. Change the port number in the **Connector port** element below from **8080** to your preferred port number.

```
<!-- Define a non-SSL HTTP/1.1 Connector on port 8080 -->
<Connector port="8080" maxHttpHeaderSize="8192"
    maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
    enableLookups="false" redirectPort="8443" acceptCount="100"
    connectionTimeout="20000" disableUploadTimeout="true" />
```

3. Change the port value as needed.
4. Save and close the file, then navigate to the `/tomcat/webapps/pentaho/WEB-INF/web.xml` directory and edit the **web.xml** file found there.
5. Change the **fully-qualified-server-url** entry to match the new port number you specified in server.xml.

```
<context-param>
  <param-name>fully-qualified-server-url</param-name>
  <param-value>http://localhost:8080/pentaho/</param-value>
</context-param>
```

Change the Web Application Name or Port

The Pentaho BA Server and web application default port number is **8080**. The default web application name is **pentaho**, which is the name of the `.war` file archive, the name of the directory that your application server creates, and also part of the URL structure for all content in the User Console.

If you need to change the User Console application name to something else, or if your Web application server is running on a port other than 8080, follow these instructions for either JBoss or Tomcat.

- [Tomcat Instructions](#)
- [JBoss Instructions](#)

Change the Web Application Name on Tomcat

These instructions only work on Tomcat servers that are configured to accept `context.xml` overrides built into deployed `.war` files. Some Tomcat deployments may not have this feature turned on. You can change the Tomcat configuration on your own, or consult your Tomcat documentation to learn about other methods of changing a web application context. Use the XML snippet in these instructions in whichever configuration file you end up creating or modifying.

Follow these instructions to change the web application context for a Pentaho `.war` file that you deployed to a Tomcat server.

1. After deployment is successful, delete the original `pentaho.xml` file.
2. Navigate to the `META-INF` directory and open the `context.xml` file in a text editor.
3. In the `context.xml` file, change the `pentaho` references in the `Context path` tag to your preferred context name:

```
<context path="/pentaho" docbase="webapps/pentaho/">
```

4. Save and close the file.
5. While still in the `WEB-INF` directory, open the `web.xml` file.
6. Edit the `pentaho.xml` file found there, and change the `fully-qualified-server-url` entry to match the context name you specified previously, and your Tomcat port number.

```
<context-param>
  <param-name>fully-qualified-server-url</param-name>
  <param-value>http://localhost:5150/example/</param-value>
</context-param>
```

Change the Web Application Name on JBoss

Follow these instructions to change the Web application context for a Pentaho `.war` file that you deployed to a JBoss server.

1. After deployment is successful, delete the original `pentaho.xml` file.
2. Open the **`jboss-web.xml`** file.
3. Edit the **`jboss-web.xml`** file and add the following text inside of the **`jboss-web`** section, replacing **`example`** with your new context name:

```
<context-root>example</context-root>
```

4. Save and close the file, then edit **`web.xml`** and modify the **`fully-qualified-server-url`** entry to match your new context name and port number.

```
<context-param>
  <param-name>fully-qualified-server-url</param-name>
  <param-value>http://localhost:5150/example/</param-value>
</context-param>
```

5. Save and close the file.

Monitor System Performance Using Pentaho Operations Mart

The Pentaho Operations Mart makes it easy for you to monitor system performance information, such as the amount of memory being used during report creation or how long it takes to run certain reports. We automatically set up a way for you to do this using the Operations Mart and Analyzer, Interactive Reports, Report Designer, and Dashboards. The Operations Mart aggregates data from the BA and DI Server log files into pre-built audit reports that provide information you might need. If these reports don't meet your needs, you can [use Pentaho Data Integration Operations Mart](#) to change them.

There are several ways you can interact with Operations Mart reports.

- [Choose a Pre-Built Operations Mart Report](#)
- [View and Edit Operations Mart Reports](#)
- [Create Operations Mart Reports](#)
- [Update the Operations Mart](#)

Choose a Pre-Built Operations Mart Report

We provide pre-built Interactive Reports and a data mart called the Pentaho Operations Mart. The Operations Mart contains all the data from system log files and these are the reports that we have pre-built for you. Choose the report that fits your needs and follow the instructions in [View and Edit Operations Mart Reports](#).

Table 4: Pre-Built Audit Mart Reports

Information Shown	Report Name
Amount of time it takes a report to run	Content Duration
File names of all content failures within a defined length of time	Content Failures
Compare login metrics for days within a specified month	Content Request Day of Month
Compare login metrics for a days in a week within a specified year	Day of Week Request and Login Metrics
List of content sorted by type, used within a defined length of time	Content Type Usage
List of content usage within a defined length of time	Content Usage
Compare login metrics by hour for a specified day	Hours in Day Request and Login Metrics
Length of time for logins and the number of logins per user for specified length of time	Session Duration Counts

View and Edit Operations Mart Reports

1. Identify the report that you want to open from [Choose a Pre-Built Operations Mart Report](#).
2. Double-click **Browse Files**.
3. Click on **public > Pentaho Operations Mart > BA Audit Reports**.
4. Select the appropriate file and click **Open**.
Your monitoring and logging data appears in the pre-built report.
5. If you need to edit this report, you can do so from within the opening tool.
6.
 - a) See [Build Web-Based Data Analysis, Reports, and Dashboards](#) for more information about editing a report in Analyzer or Interactive Reporting.
 - b) See [Design Print-Quality Reports](#) for more information about editing a report using Report Designer.

Create Operations Mart Reports

If the reports we provide are not quite right for you, you can create your own reports.

1. From within the User Console, select **Create New** and then choose the type or report you want to create.
2. Select the data source that you need.

Information Shown	Data Source
Detail information related to the execution of the actions that run the reports on the BA Server	pentaho_operations_mart: BA Operations Mart - Component
Information related to the execution of content, such as which tool or which user ran the content on the BA Server	pentaho_operations_mart: BA Operations Mart - Content
Information for the BA Server related to a user, such as number of sessions, how long, and what time	pentaho_operations_mart: BA Operations Mart - User Session
Information about individual job entry executions on the DI Server	pentaho_operations_mart: PDI Operations Mart - Job Entry
Detailed performance information for the DI Server	pentaho_operations_mart: PDI Operations Mart - Performance
Detailed information about individual step executions on the DI Server	pentaho_operations_mart: PDI Operations Mart - Step
Information related to transformations and jobs run on the DI Server	pentaho_operations_mart: PDI_Operations_Mart

3. Create a new report as described in the appropriate user section.
 - a) See [Build Web-Based Data Analysis, Reports, and Dashboards](#) to build a report in Analyzer or Interactive Reporting.
 - b) See [Design Print-Quality Reports](#) to build a report using Report Designer.

Update the Operations Mart

You may need to update the report date and time or the data that is populated into the report itself.

1. From within the User Console, select **Browse Files > public > Pentaho Operations Mart > Update Audit Mart**.
2. Double-click either **Update Operations Mart Date & Time** or **Update BA Operations Mart Data**.
3. [View a report](#) to confirm that the updates applied.

Performance Monitoring and Logging

To help you maintain the health of your Pentaho system, we provide features that help you diagnose processing errors and monitor the BA Server performance.

- [Disable Server and Session-Related Timeouts for Debug Purposes](#)
- [Log Rotation](#)

Disable Server and Session-Related Timeouts for Debug Purposes

Follow the instructions below to disable server and session timeouts associated with the User Console.



Important: These instructions are applicable when you are in a *test* environment. Once you go live, it is recommended that you set your timeouts to five or ten minutes so that sensitive BA Server-related data can be protected. The time must be expressed in minutes.

1. Open the file, **server.xml**, located under ...\\biserver-ee\\tomcat\\conf.
2. Find the **connectionTimeout="20000"** parameter and change its value to zero ("0"). If this value is set to a negative number it will never timeout.
3. Open the file **web.xml**, located under ... \\bi-server_ee\\tomcat\\webapps\\pentaho\\WEB-INF\\web.xml.
4. Find the **session-timeout** parameter and change its value to negative one ("-1").
5. Save the file and refresh the user console.

Log Rotation

This procedure assumes that you do not have or do not want to use an operating system-level log rotation service. If you are using such a service on your Pentaho server, connect to the BA Server and Data Integration Server and use that instead of implementing this solution.

The Business Analysis and Data Integration servers use the Apache log4j Java logging framework to store server feedback. The default settings in the log4j.xml configuration file may be too verbose and grow too large for some production environments. Follow these instructions to modify the settings so that Pentaho server log files are rotated and compressed.

1. Stop all relevant Pentaho servers.
2. Download a .zip archive of the Apache Extras Companion for log4j package: [Apache Logging Services](#).
3. Unpack the **apache-log4j-extras** JAR file from the zip archive, and copy it to the following locations:
 - **Business Analytics Server:** /tomcat/webapps/pentaho/WEB-INF/lib/
 - **Data Integration Server:** /tomcat/webapps/pentaho-di/WEB-INF/lib/
4. Edit the **log4j.xml** settings file for each server that you are configuring. The files are in the following locations:
 - **BA Server:** /tomcat/webapps/pentaho/WEB-INF/classes/
 - **DI Server:** /tomcat/webapps/pentaho-di/WEB-INF/classes/
5. Remove all **PENTAHOCONSOLE** appenders from the configuration.
6. Modify the **PENTAHOFILE** appenders to match the log rotation conditions that you prefer.

You may need to consult the log4j documentation to learn more about configuration options. Two examples that many Pentaho customers find useful are listed:

Daily (date-based) log rotation with compression:

```
<appender name="PENTAHOFILE" class="org.apache.log4j.rolling.RollingFileAppender">
  <!-- The active file to log to; this example is for BA/DI Server.-->
  <param name="File" value="../logs/pentaho.log" />
  <param name="Append" value="false" />
  <rollingPolicy class="org.apache.log4j.rolling.TimeBasedRollingPolicy">
    <!-- See javadoc for TimeBasedRollingPolicy -->
    <param name="FileNamePattern" value="../logs/pentaho.%d.log.gz" />
  </rollingPolicy>
  <layout class="org.apache.log4j.PatternLayout">
```

```

        <param name="ConversionPattern" value="%d %-5p [%c] %m%n"/>
    </layout>
</appender>

```

Size-based log rotation with compression:

```

<appender name="PENTAHOFIELD" class="org.apache.log4j.rolling.RollingFileAppender">
    <!-- The active file to log to; this example is for BA/DI Server.-->
    <param name="File" value="../logs/pentaho.log" />
    <param name="Append" value="false" />
    <rollingPolicy class="org.apache.log4j.rolling.FixedWindowRollingPolicy">
        <param name="FileNamePattern" value="../logs/pentaho.%i.log.gz" />
        <param name="maxIndex" value="10" />
        <param name="minIndex" value="1" />
    </rollingPolicy>
    <triggeringPolicy class="org.apache.log4j.rolling.SizeBasedTriggeringPolicy">
        <!-- size in bytes -->
        <param name="MaxFileSize" value="10000000" />
    </triggeringPolicy>
    <layout class="org.apache.log4j.PatternLayout">
        <param name="ConversionPattern" value="%d %-5p [%c] %m%n" />
    </layout>
</appender>

```

7. Save and close the file, then start all affected servers to test the configuration.

You have an independent log rotation system in place for all modified Pentaho servers.