Install Only BA Tools and Plugins

Help and Support Resources

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Introduction

This section explains how to install BA Design Tools and Plugins so that you can filter and visualize data, create custom 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.

Expertise

The topics in this section are written for evaluators, analysts, and IT administrators who have who have access to the workstations on which the design tools will be installed.
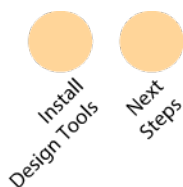
Tools

You must have installed a version of Java that is *compatible* with the Pentaho BA Suite.

Login Credentials

All of the tasks in this section require that you have the appropriate permissions and accesses required to install design tool software on workstations.

Install BA Design Tools Overview

To use the BA Suite 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. Follow the *guidepost* to complete the entire installation process. Choose which method you want to use to install BA Design Tools.

Table 1: BA Design Tools Installation Decision Table

If You Are Interested In	Choose Options	
	Wizard	**Manual**
• Summary	The Wizard is the easiest way to install BA Design Tools. The Wizard allows you to install one or more Design Tools on the server or client workstations.	The manual method allows you to manually copy files to any directory on the server or workstation.
• 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.**

Install Design Tools and Plugins

Install the design tools using the Installation Wizard or the Manual method.

Use the BA Wizard to Install BA Design Tools

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

1. As you run the Installation Wizard a series of windows appear. When the **Pentaho Applications** window displays, select any combination of the Aggregation Designer, Metadata Editor, Report Designer, and Schema Workbench to install the design tools.
2. When the installer is complete, you can start the tools from the Start menu; on Linux systems, they'll be available through the command line, or you can create your own shortcuts on your desktop or in the GNOME or KDE panels. The default installation directory is `C:\Program Files\pentaho\design-tools\` on Windows, `/Applications/pentaho/design-tools/` on OS X, and `~/pentaho/design-tools/` on Linux.

Manually Install Design Tools

To manually install design tools and plugins, complete these steps.

Caution: Do not use Unarchiver 3.3 to unzip files; it may corrupt the plugin file names.

1. Download the design tool and plugin installation files that you want to install from the Pentaho website.

   - Metadata Editor: `pme-ee-5.0.0-GA-dist.zip`
   - Report Designer (For Window and Linux only): `prd-ee-5.0.0-GA-dist.zip`
   - Report Designer (For Mac OS only): `prd-ee-mac-5.0.0-GA-dist.zip`
   - Schema Workbench: `psw-ee-3.6.0-dist.zip`
   - Aggregation Designer: `pad-ee-5.0.0-GA-dist.zip`
   - Dashboard Designer: `pdd-plugin-ee-5.0.0-GA-dist .zip`
   - Interactive Reporting: `pir-plugin-ee-5.0.0-GA-dist.zip`
   - Geo Plugin: `pentaho-geo-5.0.0-GA-dist.zip`
   - Mobile Plugin: `pentaho-mobile-plugin-5.0.0-GA-dist.zip`

   Note: For information on how to install Analyzer, see the *Install Analyzer* section.

2. Unpack the file by completing these steps.

   a) Use a zip tool to extract the file you just downloaded.
   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)
      ```

   d) To start a design tool, navigate to the directory in which it was installed, then run the file indicated in the table.

Table 2: Design Tool Files

Design Tool	Windows File Name	Linux File Name
Aggregation Designer	`startaggregationdesigner.bat`	`startaggregationdesigner.sh`
Metadata Editor	`metadata-editor.bat`	`metadata-editor.sh`
Report Designer	`report-designer.bat`	`report-designer.sh`
Schema Workbench	`workbench.bat`	`workbench.sh`

4. Unlike Pentaho's standalone client tools, Dashboard Designer is a plugin for the BA Platform, and must be installed on the server. Complete these steps to install Dashboard Designer.

   a) Copy the Dashboard Designer file to the following path: `/pentaho/server/biserver-ee/pentaho-solutions/system/`.

   b) The Pentaho Dashboard Designer plugin is now installed, though you will still need to register your license file in the Pentaho User Console. Instructions for this appear in the BA Configuration instructions.

5. To install a plugin, unzip the plugin in the appropriate subdirectory in the the `pentaho/server/biserver-ee/pentaho-solutions/system` directory.

Installing 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.

1. If you have not already done so, retrieve the `pentaho-analysis-ee-5.0.0-GA` package from the Pentaho Customer Support Portal (login credentials were emailed to you with your Welcome Kit).

2. Unpack the archive to a temporary location.

3. If it is currently running, shut down the BA Server.

4. Copy only the following JARs from the `/pentaho-analysis-ee/lib/` directory to the `/tomcat/webapps/pentaho/WEB-INF/lib/` directory.

   - infinispan-core- 4.2.1.FINAL
   - jboss-transaction-api-1.0.1.GA
   - jcip-annotations-1.0
   - jgroups-2.12.0.CR5
   - marshalling-api-1.2.3.GA
   - memcached-0.0.1-PENTAHO
   - pentaho-analysis-ee-3.5.0-GA-obf
   - river-1.2.3.GA

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. Too enable the segment cache plugin, you must 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