



Install All Components



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Help and Support Resources

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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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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 to Pentaho BA Suite Installation Wizard

This guide explains how to use the Wizard to install the Pentaho Business Analytics Suite. After installation, you can use the suite to create reports and visualize them; create and schedule extract, transform, and load processes; model your data and perform processing related to big data sources. The Wizard can be used to install the Business Analytics and Data Integration servers BA and DI design tools, as well as standard plugins such as Analyzer, Instaview, and Big Data.

Prerequisites

If you are not sure which installation method you want to use, read [BA Installation Overview](#) before you begin. We assume that you plan to install the software on a

Expertise

The topics in this section are written for IT administrators, evaluators, and analysts who have who have the appropriate permissions and accesses required to install the Business Analytics Suite on servers or workstations.

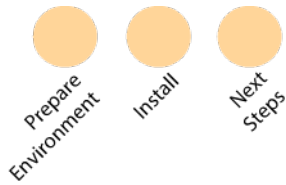
Tools

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

Login Credentials

All of the tasks in this section require that you have the appropriate permissions and accesses required to install software on servers and workstations. Some Windows systems have expanded user access and permissions restrictions that change the way the software is installed and accessed by system users. If this happens, the installation wizard will require that you execute it with elevated permissions (**Run Elevated** status) so that the BA and DI Servers are accessible to all users.

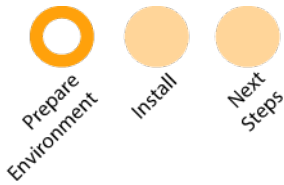
Wizard Installation Process Overview



The Wizard Installation process consists of three steps.

- The [Prepare Environment](#) step explains how to download the installation package. It also provides instruction on how to create a pentaho account.
- The [Install](#) step explains how to use the wizard to install the software.
- [Next Steps](#) explains what to do after install is complete.

Prepare Environment



To prepare the environment, you must download the installation package and, if you are installing Pentaho on a Linux system, you must create a Pentaho user account. Also, make sure that your memory settings for PostgreSQL are correct.

- [Create User Account](#)
- [Download and Unpack Installation Package](#)
- [Check memory settings for PostgreSQL](#)

Create User Account

Windows User Account

If you plan to install the BA Suite on a server that runs Windows, you do not need to create a special user account on the server. However, you should use an account that has administrator privileges to complete the tasks in this guide.

Linux User Account

If you plan to install the BA Suite in a Linux environment you must create a user account named **pentaho** on the server computer. By default, license information for Pentaho products is stored in the home directory for this account. Use this account to perform installation tasks that do not require root access. Also, use this account to run start and stop server scripts.

1. Open a **Terminal** window on the server. If you plan to install the software on a remote computer, establish an OpenSSH session to the remote server.
2. In the **Terminal** window, log in as the **root** user by typing this command.

```
su root
```

3. When prompted, type the password in the **Terminal** window.
4. In the **Terminal** window, create a new user account called **pentaho**, along with the `pentaho` home directory, by typing this line.

```
sudo useradd -s /bin/bash -m pentaho
```

Note: `/bin/bash` indicates that the user account should be created using the Bash shell. In many Linux distributions, the default new user shell is `/bin/sh` or some equivalent, such as Dash, that might not use the `~/ .bashrc` configuration file by default. If you don't have or want to use Bash, adjust the instructions throughout this guide accordingly.

5. In the **Terminal** window, assign a password for the **pentaho** user by typing this line.

```
sudo passwd pentaho
```

6. Verify that you can log in using the newly-created **pentaho** user account.
 - a) In the **Terminal** window, log in by typing this command.

```
su pentaho -
```

- b) Type the password for the **pentaho** user account if you are prompted.
- c) Use the **Terminal** window to navigate to the `pentaho` directory to verify that it has been created. By default, it is in the `/home` directory.
- d) Close the **Terminal** window.

Download Installation Package

Download the installation file from the Pentaho website. There are installation files for the Windows, Linux, and Mac platforms. Download the installation file for your operating system.

- **Windows:** `pentaho-business-analytics-5.0.0-GA-x64.exe`
- **Linux:** `pentaho-business-analytics-5.0.0-GA-x64.bin`
- **Mac:** `pentaho-business-analytics-5.0.0-GA-x64.app.tar.gz`

Disable AntiSpyware or Antivirus Programs

Disable any anti-spyware software before installing Pentaho Business Analytics. Some types of software firewalls and anti-virus scanners may also block the BA Server or prevent it from operating normally. After the server is installed, reenable them again.

Adjust PostgreSQL Memory Settings

Make sure that your shared memory settings are set as described in <http://www.postgresql.org/docs/devel/static/kernel-resources.html>.



Note: PostgreSQL may fail to start up if the kernel shared memory settings are too low.

Install and Start Pentaho

After you have prepared your environment, use the Wizard to install the BA Suite.

Install Pentaho Software with Wizard

Use the wizard to install Pentaho software. By default, the software is deployed on Tomcat, which is the default web application server, and stores data in the BA and DI Repositories, which by default are housed in PostgreSQL. Wizard installation instructions are the same for the Windows, Linux, and Mac platforms. Before you complete these steps, determine whether you want to perform a default or custom installation.




Note: The licensing technology in the BA Server requires that you take all of the steps below to make sure that all system users have access to content and tools through the Pentaho User Console. If you used the graphical installation utility to evaluate the Pentaho Business Analytics on Linux before you purchased a subscription, you did not have to establish a new user account or worry much about licensing. However, the procedure is more involved on a production server, where more than one user will be accessing the Pentaho User Console or managing BA Server licenses.

Table 1: Wizard Installation Decision Table

Explore Considerations	Choose the Best Option For You	
	Default	Custom
Summary	This option installs all components automatically.	This option allows you to choose the components you want to install.
Installed Components	Installs all components in the Pentaho BA Suite. <ul style="list-style-type: none"> 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. 	You can choose to install some or all of the components in the Pentaho BA Suite. <ul style="list-style-type: none"> 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.
Expertise	You need this knowledge to perform this type of installation. <ul style="list-style-type: none"> Basic computer knowledge. 	You need this knowledge to perform this type of installation. <ul style="list-style-type: none"> Knowledge of your networking environment, including database port numbers if they differ from the default and IP addresses.
Time	Approximately 30 minutes.	Approximately 30 minutes or less.
Recommendation	Select if you want to install all of the Pentaho software on your workstation or server and if you want to install sample content. We recommend that you choose	Select if you want to choose which Pentaho programs to install on your workstation or server or if you want the option to not install sample content. We recommend that you choose this option if you want to set up a production system

Explore Considerations	Choose the Best Option For You	
	Default	Custom
	this option if you want to evaluate Pentaho or to start using it quickly.	or if you want to install only some Pentaho products. For example, if you want to install the Pentaho BA and DI Servers on your server, and the Interactive Reporting and Analysis tools on a workstation, choose this option.

To install the software, complete these steps.

 **Note:** Do not use the following characters in passwords: ' " & < > \ ` . The installation utility is unable to process these characters.

1. Launch the wizard by double-clicking the installation file or launching it from a **Command Prompt** or **Terminal** window.

Note: If your system does not support graphics, you can run the installation utility in text mode by invoking the **--mode text** switch. You can also perform the installation on a Linux workstation, then transfer over the `/pentaho/` and `~/pentaho/` directories to your server after installation. Also note that the installation utility's graphical mode defaults to the GTK graphics toolkit. If you do not have the requisite GTK libraries on your system, you can run the installer with the **--mode xwindow** switch to use OpenMotif instead.

2. The Pentaho wizard splash screen appears, then the **Welcome** window. Click **Next**.
3. Read the license agreement. Accept the license agreement, then click **Next** to continue.
4. If you choose the default installation, click the **Default** in the **Setup Type** window, then do these things. Otherwise, go to the next step.
 - a) In the **Installation Folder** window, accept the default directory or browse to the directory where you want to install the Pentaho applications to be installed, then click **Next**.

Note: We do not recommend that you install Pentaho in the `/opt/` directory. The complicated permissions requirements and general isolation from the rest of the system can cause unintended issues to arise if Pentaho is installed there.
 - b) When prompted for the PostgreSQL password, type the password that you will use for the BA and DI Repositories. Click **Next** to continue.
 - c) The **Ready to Install** window appears. Click the **Next** button to install the software.
5. If you choose the custom installation, click the **Custom** installation in the **Setup Type** window, then do these things. Otherwise, go to the next step.
 - a) Select the Pentaho applications that you want to install from the **Pentaho Applications** window. Click **Next**.
 - b) If you indicated that you wanted to install the **BA Server**, the **Sample Content** window appears. Indicate whether you want the wizard to install the sample content, then click **Next**.

Note: We strongly recommend that you install the sample content. Tutorials and other documentation examples use sample data. Also, if you contact technical support or professional services, sample data is often used to help troubleshoot issues. If you decide that you do not want to use the sample data, you can remove it after you have installed the software.
 - c) When the **Installation Folder** window appears, either keep the directory or browse to the directory where you want to install the Pentaho applications. Click **Next** to continue.

Note: You cannot install into a directory that already exists. Also, we do not recommend that you install Pentaho in the `/opt/` directory. The complicated permissions requirements and general isolation from the rest of the system can cause unintended issues to arise if Pentaho is installed there.
 - d) If you indicated that you wanted to install the **BA Server**, the **PostgreSQL postgres user password** window appears. PostgreSQL is the database that the wizard installs by default. It contains the Pentaho BA Repository, including any sample data. Enter the user password and click **Next**.
 - e) The **Ready to Install** window appears. Click the **Next** button to install the software.
6. The **Installation in Progress** window appears. The process takes about 20 minutes to complete.

Note: An error occurs if Pentaho BA and DI Server port numbers (**8080, 9092, 9080, 8443, 9443, and 5432**) are not available on your system and if the additional ports that the wizard has tried are not available. If the wizard cannot find an available port, you are prompted to enter port numbers you want to use.

7. The **Installation Complete** window appears. Click the **View Installation Summary** and **Launch the Pentaho User Console** options to launch the User Console and to view the installation summary. Click the **Finish** button to end the process.
8. To verify that installation has occurred correctly, view the Pentaho Summary window to make sure that all of the tools that you wanted to install appear in the list. By default, the **Report Designer**, **Metadata Editor**, **Schema Workbench**, **Aggregate Table Designer**, **Dashboard Designer**, **Data Integration (ETL)**, **Analyzer**, **Interactive Reporting**, and **Mobile** tools are installed. Sample content is also installed by default. Note the administrative username and password. Click **OK** button to close the **Pentaho Summary** window.
9. The **Getting Started Guide** appears, as well as the **Pentaho User Console Login** window.

The Pentaho Directory Structure

The wizard installer creates a directory structure for Pentaho software. The diagram shows the entire structure, although your installation will be different if you only have some Pentaho components. This structure differs slightly from an archive-based installation or manual deployment. The wizard installer includes a Java Runtime Environment and service control scripts. If you installed the full Pentaho suite, the Pentaho directory structure will look like this.

```
pentaho
../server
../..../biserver-ee
../..../data
../..../licenses
../..../pentaho-solutions
../..../tomcat
../..../data-integration-server
../..../data
../..../licenses
../..../pentaho-solutions
../..../tomcat
../design-tools
../..../aggregation-designer
../..../data-integration
../..../metadata-editor
../..../report-designer
../..../schema-workbench
../common
../documentation
../java
../licenses
../postgresql
../scripts
```

Top-level files

These files are found in the top-level Pentaho directory:

- **ctlscript:** (.sh or .bat) Starts, stops, restarts, and shows the status of Pentaho services.
- **installation-summary.txt:** Contains the information from the summary screen at the end of the installation process.
- **pentaho.log:** The Tomcat log file for the Pentaho Web application.
- **uninstall:** A script that removes Pentaho Business Analytics.

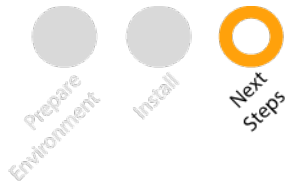
Locations of specific programs

- **BA Server:** pentaho/server/biserver-ee/
- **DI Server:** pentaho/server/data-integration-server/
- **Report Designer:** pentaho/design-tools/report-designer/
- **Schema Workbench:** pentaho/design-tools/schema-workbench/
- **Data Integration (PDI):** pentaho/design-tools/data-integration/
- **Metadata Editor:** pentaho/design-tools/metadata-editor/
- **Aggregation Designer:** pentaho/design-tools/aggregation-designer/
- **Dashboard Designer:** pentaho/server/biserver-ee/pentaho-solutions/system/dashboards/
- **Analyzer:** pentaho/server/biserver-ee/pentaho-solutions/system/analyzer/

- **Interactive Reporting:** pentaho/server/biserver-ee/pentaho-solutions/system/pentaho-interactive-reporting/
- **License Installer:** pentaho/server/enterprise-console/license-installer/
- **Pentaho Mobile:** pentaho/server/biserver-ee/pentaho-solutions/system/pentaho-interactive-reporting/Pentaho-mobile-plugin

Note: The license installer can also be found in the report-designer, data-integration, and metadata-editor directories. All of these license installers perform the same functions, but are available in separate places to account for instances where only specific parts of Pentaho Business Analytics are installed to a particular machine. It does not matter which one you use. You can also install licenses through the Pentaho User Console.

Next Steps



Congratulations, you have finished installing the Pentaho BA Suite! Now, you are ready to these things.

- [Configure the BA Server and Client Tools](#)
- [Configure the DI Server and Client Tool](#)

Note: If you have installed the DI Server, BA Server or both, and you want to migrate content from the previous version of the servers to this one, make sure that your license keys have been installed, then view the [BA Upgrade instructions](#), the DI Upgrade instructions, or both.