



Install Only DI Tools and Plugins



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# Installation of DI Design Tool and Plugins Introduction

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This guide explains how to install the DI design tool and plugins. You only need to install the DI Design Tool and Plugins if you installed the DI Server using the *Install with Your Own DI Repository* method. This method was formerly referred to as the archive method.

## Prerequisites

Before you begin, you must have installed DI Server on the same computer on which you plan to install the design tool and plugins, or on a server computer that is on your network.

## Expertise

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

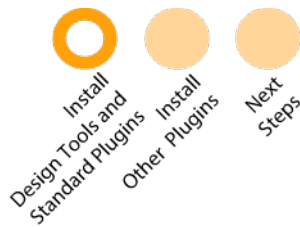
## Tools

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

## Login Credentials

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

# Install DI Design Tool and Standard Plugins



To use Pentaho Data Integration to extract data, transform it into a useful format, and load it for analysis, you need to install the Spoon design tool along with the Kitchen, Pan, and Carte utilities. When you install the design tool and utilities, several plugins are also automatically installed such as Big Data, Instaview, and Marketplace.

Follow the *Guide Posts* to make sure you complete the entire process. The process should take approximately 15 - 20 minutes.

Choose which method you want to use to install DI design tool.

**Table 1: PDI Design Tool and Plugin Installation Decision Table**

| If You Are Interested In   | Choose Options  |   |
|--|---|---|
|  | Wizard  | Manual  |
| <ul style="list-style-type: none"> <li>Summary</li> </ul>        | The Business Analytics Wizard is the easiest way to install design tool (Note that you cannot choose to install only the design tool with the Pentaho Data Integration Wizard, only the Business Analytics Wizard.) The Business Analytics Wizard provides an intuitive graphical interface that allows you to select the design tool you want to install on the workstation. | Use this method if you want to manually copy files to the appropriate directory on the workstation. |
| <ul style="list-style-type: none"> <li>Expertise</li> </ul>      | Basic computer knowledge  | Basic computer knowledge  |
| <ul style="list-style-type: none"> <li>Time</li> </ul>           | 15 minutes.   | 10 minutes.   |
| <ul style="list-style-type: none"> <li>Recommendation</li> </ul> | <b>Use for the Pentaho Trial Download, evaluating, rapid development and production.</b>  | <b>Use for production.</b>  |

## Use the Wizard to Install DI Design Tool and Standard Plugins

Perhaps the easiest way to install DI design tool, utilities, and standard plugins is to use the Installation Wizard. As you follow the instructions, select the **Data Integration (ETL)** option when you see the **Pentaho Applications** window.

## Manually Install DI Design Tool

1. Download the `pdi-ee-client-5.0.0-GA-dist.zip` file.
2. Create the `design-tools` directory under your `pentaho` directory. The directory path should look like this.

```
pentaho/design-tools
```

3. Extract the `pdi-ee-client-TRUNK-SNAPSHOT.zip` file to the `design-tools` directory. A `data-integration` directory should appear. The design tool, utilities and plugins appear in these paths.

```
pentaho/design-tools/data-integration (Spoon, Kitchen, Pan, Carte and Instaview)
```

```


pentaho/design-tools/data-integration/plugins/pentaho-big-data-plugin (Big Data
Plugin)
pentaho/design-tools/data-integration/plugins/mongodb-plugin (MongoDB Plugin)
pentaho/design-tools/data-integration/plugins/market (Marketplace Plugin)

```

4. To start the design tool, see the PDI Configuration Guide.

## Adding a JDBC Driver

Before you can connect to a data source in any Pentaho server or client tool, you must first install the appropriate database driver. Your database administrator, Chief Intelligence Officer, or IT manager should be able to provide you with the proper driver JAR. If not, you can download a JDBC driver JAR file from your database vendor or driver developer's Web site. Once you have the JAR, follow the instructions below to copy it to the driver directories for all of the Business Analytics components that need to connect to this data source. See the Compatibility Matrix: Supported Components Compatibility Matrix: Supported Components in any of the Installation guides for current version numbers.

 **Note:** Note: Microsoft SQL Server users frequently use an alternative, non-vendor-supported driver called JTDS. If you are adding an MSSQL data source, make sure that you are installing the correct driver.

You must also make sure that there are no other versions of the same vendor's JDBC driver installed in these directories. If there are, you may have to back them up and remove them to avoid confusion and potential class loading problems. This is of particular concern when you are installing a driver JAR for a data source that is the same database type as your Pentaho solution repository. If you have any doubts as to how to proceed, contact your Pentaho support representative for guidance.

1. Copy the appropriate JAR file to the following directory: `pentaho/design-tools/data-integration/libext/JDBC/`


**Note:** When connecting to a Microsoft SQL Server using Integrated or Windows Authentication, the JDBC driver supports Type 2 integrated authentication on Windows operating systems through the `integratedSecurity` connection string property. To use integrated authentication, copy the `sqljdbc_auth.dll` file to all the directories to which you copied the JDBC files. Use the `sqljdbc_auth.dll` file, in the `x86` folder, if you are running a 32-bit Java Virtual Machine (JVM) even if the operating system is version `x64`. Use the `sqljdbc_auth.dll` file in the `x64` folder, if you are running a 64-bit JVM on a `x64` processor. Use the `sqljdbc_auth.dll` file in the `IA64` folder, you are running a 64-bit JVM on an Itanium processor. The `sqljdbc_auth.dll` files are installed in the following location:

```
<installation directory>\sqljdbc_<version>\<language>\auth\
```

2. The driver should be used the next time you start Spoon.

## Configuring MonetDB for Instaview

The Pentaho Data Integration and Business Analytics Wizard Installers configure the Instaview plugin to work properly with the MonetDB database. However, if you chose to install the DI Server using another method, you need to configure Monetdb to work with Instaview.

 **Note:** If you have already installed Instaview in the past, the steps that follow might have already been completed. If so, then review the steps to verify that they have been performed.

1. [Download the "Jul2012-SP2" version](#) of MonetDB and install it on your computing environment. See [MonetDB's documentation](#) if you need help completing this step.
2. Configure Instaview/Kettle to use Monetdb.

### For Windows

- a) In `<user home>/.kettle/spoonrc`, add these properties.

```

MonetDBDatabaseName=pentaho-instaview
MonetDBDefaultBufferSize=100000
MonetDBDefaultEncoding=UTF-8
MonetDBDefaultLogFile=

#Full path to the mclient batch file
MonetDBDefaultMClientPath=C:\PROGRAMS\MonetDB\MonetDB5\mclient.bat

MonetDBDefaultSchemaName=
MonetDBDefaultTableName=tmp_agile_data

```

```
#port that monet db is running on, 50000 is the default for Monetdb
MonetDBPort=50000

MonetDBProcessName=mserver5.exe
```

- b) In <user home>/kettle/kettle.properties, add these properties:

```
AgileBIDatabase=AgileBI

#Full path to the mclient batch file
MonetDBDefaultMClientPath=C:\\\\PROGRA~1\\\\MonetDB\\\\MonetDB5\\\\mclient.bat

#path to the Instaview templates folder
InstaviewTemplates=C:\\\\PROGRA~1\\\\pentaho\\\\design-tools\\\\data-integration\\\\plugins\\\\
\\\\spoon\\\\agile-bi\\\\platform\\\\pentaho-solutions\\\\system\\\\instaview\\\\templates
```

### For Mac or Linux

- a) In <user home>/kettle/.spoonrc, add these properties, verifying that the paths are correct for your system.

```
#Full path to the monetdb process/executable
MonetDBCmd=/usr/local/monetdb/bin/monetdb

#Full path to the monetdbd process/executable
MonetDBDCmd=/usr/local/monetdb/bin/monetdbd

#Name of the database used for instaview
MonetDBDatabaseName=pentaho-instaview

MonetDBDefaultBufferSize=100000
MonetDBDefaultEncoding=UTF-8
MonetDBDefaultLogFile=

#Full path to the mclient process/executable
MonetDBDefaultMClientPath=/usr/local/monetdb/bin/mclient
MonetDBDefaultSchemaName=
MonetDBDefaultTableName=tmp_agile_data

#port that monet db is running on, 50000 is the default for MonetDB
MonetDBPort=50000
```

- b) In <user home>/kettle/kettle.properties, add these properties:

```
AgileBIDatabase=AgileBI

#Full path to the mclient process/executable
MonetDBDefaultMClientPath=/usr/local/monetdb/bin/mclient

#path to the Instaview templates folder
InstaviewTemplates=/home/joe/pentaho/design-tools/data-integration/plugins/spoon/
agile-bi/platform/pentaho-solutions/system/instaview/templates
```

### For any OS

- a) Create a .monetdb file in your user home folder, /home/<userName>/monetdb.  
b) Add these two entries:

```
user=monetdb
password=monetdb
```

# Install Additional Plugins

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DI plugins provide you with additional ways to extract, transform, and load data.

You can install plugins using a manual method or using the Marketplace.

## Use the Manual Method to Install Plugins

---

1. Download the plugin and unzip it in the appropriate subdirectory in `pentaho/design-tools/data-integration/plugins`. To determine the correct subdirectory, see the instructions for the plugin you are installing for more instructions.
2. Start Spoon.

## Use the Marketplace to Install Plugins

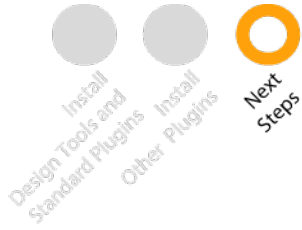
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1. Start Spoon.
2. Select **Help > Marketplace**. The **PDI Marketplace** window appears.
3. The name of the plugin appears in the **Detected plugins** section of the page. Note which plugins are installed. You can filter the list by typing the name of the plugin in the **Detected Plugins** textbox.
4. Click the name of the plugin to expand it. Information about the plugin, including the documentation, source code, and support information appears.
5. Click **Install this plugin**.
6. The **Progress Information** dialog box appears indicating the operation is in process. When the plugin has been successfully installed, a message appears indicating that you will need to restart your client, which is Spoon.
7. Click **OK**.
8. Restart Spoon.
9. To verify that the plugin was installed, open the **PDI Marketplace** window again. The plugin is listed as installed. The plugin should appear in the logical place in the Spoon interface. For example, if the plugin that you install is the CMIS Input plugin, it will appear in the **Design** tab in the **Output Steps** category.



## Next Steps

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Now that the DI client tools has been installed, configure the DI Server.