

# Client: National Oak

# Client Contact Name: Stephan McQuown

# Date: 4/15/21

# Customer Questionnaire

# Business Analytics Upgrade

# Overview

This document is intended to be used as a self-service tool for Pentaho Enterprise Customers. You will complete the questionnaire as best you can. The information will be used by Pentaho to assess your environment and the proper upgrade path.

# Intended Audience

The document assumes that the person answering these questions will have access to and knowledge of the servers that Pentaho are installed on and the configuration of the Pentaho BA/DI Suite.

# Server/Hardware Container

|  |  |
| --- | --- |
| **Question** | **Answer** |
| Configured environments (DEV, TEST, PROD, etc.) | Prod only, we do development locally |
| Server operating system and version | Windows Server 2016  going to > Red Hat Enterprise Linux 7.9 (Maipo) |
| Server processor specifications and cores | Intel Xeon Gold 6148 CPU 2.40 GHz 4 Cores >  going to > Intel Xeon Gold 6148 CPU 2.40 GHz 4 Cores |
| Available memory to the OS | 64 GB  going to > 8 GB |
| Physical location and proximity (are they in same country, data center, rack, etc…) | Boca Raton FL same physical rack and data center |
| OS user who runs the Pentaho processes | PentahoSvc |
| Is a proxy or load balancer used in front of the Pentaho servers? | No, not to my knowledge |

# Data Integration

|  |  |
| --- | --- |
| **Question** | **Answer** |
| Installed Pentaho software and version (DI Server, DI Client, etc.) | Pentaho PDI Enterprise Edition v7.1 |
| Installation mechanism (Installer, Archive) | Unknown, person who installed no longer with National Oak Distributors |
| Min and max memory allocated to the Pentaho JVM’s | Unknown |
| What scripts are used to start/run Pentaho? Pan/kitchen/carte/DIS? | start-pentaho.bat; I launch by starting the Apache Tomcat service |
| Which repository is used to stored transformations and jobs? (File, Database, Ent Repo) | Database |
| What is the frequency of execution of jobs? | ~ 5 minutes during business hours |
| What is the number of jobs executing each (hour/day/week)? | 1,771 NOT DISTINCT JOBS THOUGH (same jobs recurringly run) |
| What is the number of transformations executing in those jobs | 2,440 again, this includes recurring |
| Are the jobs running on one server or several servers? Is Pentaho clustering being used? | One server; no clustering |
| Are jobs scheduled using DIS? BIS? OS? Or manual? | I use the built in scheduler in Pentaho User Console (PUC), I believe Quartz?? |
| What security is used for developers and operators? | Windows |
| What plugins have been installed or removed on the server? | Unknown |
| Is the Operations Mart being used? | Unknown, we just use the DI to best of my knowledge |

# Business Analytics Server – Not Applicable

| **Question** | **Answer** |
| --- | --- |
| Installed Pentaho software and version (BA Server, client tools, etc |  |
| Installation mechanism (Installer, Archive, Manual) |  |
| Min and max memory allocated to the Pentaho JVM’s |  |
| What scripts are used to start/run Pentaho? ctlscript.sh, start-pentah.sh, ctl.sh, etc.? |  |
| How is security configured? Pentaho, LDAP, JDBC, etc. |  |
| Are there security extensions in place (SSO, DSP, SQL Generator, etc.) |  |
| Have any JNDI datasources been added to context.xml or server.xml? |  |
| How many metadata models have been created and used? Are the metadata models secured by role? |  |
| How many Mondrian schemas and cubes have been created and used? Are the schemas secured by role? |  |
| What security is used for developers and users? |  |
| What plugins have been installed or removed on the server? |  |
| Have other configuration files been modified from their defaults of a fresh installation? |  |
| Have any language localizations been made? |  |
| Is Pentaho integrated with other web applications? If so, what URL’s are used for the integration? |  |
| Has the Pentaho UI been customized or themed? |  |
| Which repository is used to store content? (MySQL, PostgreSQL, Oracle) |  |
| How many users run report? Where are those users located geographically? |  |

# Business Analytics Content – Not Applicable

|  |  |
| --- | --- |
| **Question** | **Answer** |
| What types of content are being used and how many of each? xanalyzer, xdash, prpt, xaction, waqr, jpivot etc. |  |
| Are there any reports that are executed on a schedule? If so, which reports on what schedule? |  |
| Have ACL’s been applied to specific reports? Or just defaults |  |
| If using PRD or xactions, what are the datasource types? SQL, MDX, PDI, etc. |  |
| If using PRD, have drill links been defined and are they using manual linking or Pentaho File linking? |  |

