Version 5.2

OnlyDITools

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Installation of DI Design Tool and Plugins Introduction

These instructions explain how to install the DI design tool and plugins. You only need to install the DI design tool if you did not use the installation wizard to install PDI. Some plugins are installed by default, such as Big Data and Instaview; other plugins are available. This guide explains how you can install them.

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 anyone who wants to install the DI design tool and plugins.
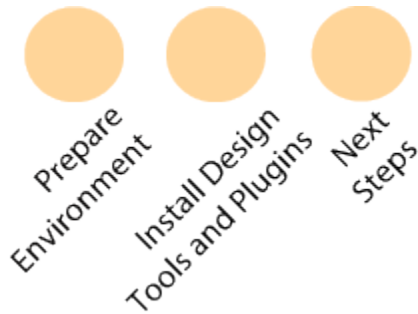
Tools

You must supply a workstation that meets the hardware and software requirements indicated in the Supported Technologies section.

Login Credentials

All of the tasks in this section require that you have the appropriate permissions and accesses required to install software on the computer.
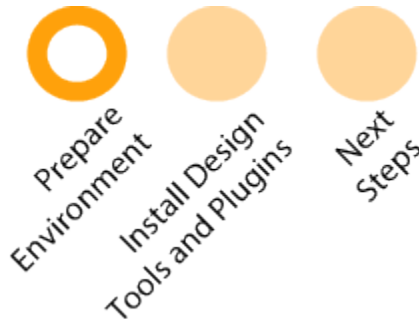
Overview of DI Design Tool and Plugin Installation Process

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 *guidepost* to make sure you complete the entire process.

- [Prepare Environment](): Prepare the computer on which you want to install the design tool and plugins.

- [Install Design Tools and Plugins](): Use the wizard or manual process to install the design tool and plugins.

- [Next Steps](): Determine what to do after the design tool and plugins have been installed.

Prepare Environment

To prepare the computer on which you plan to install the DI design tool and plugins, complete these tasks.

Install Java JRE or JDK

Make sure that the version of the Java Runtime Environment (JRE) or the Java Development Kit (JDK) that Pentaho needs to run is installed on your system. You do not need to uninstall other versions of Java if you already have them running on your system. These instructions explain how to check for your default version of Java that is running on your computer and where to get the required version if you need one.

1. Check the supported technologies list to see which version of the JRE or JDK is needed for the software.
2. If you have not done so already, log into the computer on which you plan to install the software. Ensure that you have the appropriate permissions to install software.
3. Open a **Terminal** or a **Command Prompt** window. Enter this command.

   ```
   java -version
   ```

4. If the version of Java does not match the version needed to run Pentaho software, check your system to see if there are other versions of Java installed.
5. If the version of Java that you need to run Pentaho software is not on your system, download it from the Oracle site and install it.

Set Environment Variables

Set the `PENTAHO_JAVA_HOME` variable to indicate the path to the Java JRE or JDK that Pentaho should use. If you do not set this variable, then Pentaho will not start correctly.

To set environment variables, you should be logged into an account that has administrator-level privileges. For Linux systems, you must be logged into the **root** user account.

Set Windows PENTAHO_JAVA_HOME Variable

1. From the **Start** menu, right-click **Computer**, then select **Properties** from context menu.

2. Click **Advanced System Settings**. The **System Properties** window appears.

3. In the **System Properties** window, click the **Advanced** tab, then click **Environment Variables**.

4. To set the `PENTAHO_JAVA_HOME` variable do this.

    a. In the **System Variable** section, click **New**.

    b. In the window that appears, type `PENTAHO_JAVA_HOME` in the **name** field.

    c. In the **value** field, enter the directory where your Oracle JDK or Oracle JRE is stored. For example your Java JRE is in the `Program Files\Java\jre7` directory, type this.

    ```
    C:\Program Files\Java\jre7
    ```

    d. Click **OK**.

5. Click **Apply Changes**.

6. Log out, then log back in.

7. To verify that the variables have been properly set, open a **Command** window and type this.

    ```
    echo %PENTAHO_JAVA_HOME%
    ```

Set Linux PENTAHO_JAVA_HOME Variable

1. Open a **terminal** window and log in as **root**.

2. Open the `/etc/environment` file with a text editor. **Note:**The vi and gedit text editors are available on most Linux machines. For example, to open the `/etc/environment` file with gedit, type this.
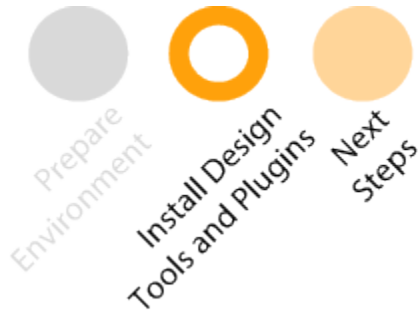
    ```
    gedit /etc/environment
    ```

3. Indicate where you installed Java in your `/etc/environment` file by typing this. **Note:** Substitute `/usr/lib/jvm/java-7-sun` with the location of the JRE or JDK you installed on your system.

    ```
    export PENTAHO_JAVA_HOME=/usr/lib/jvm/java-7-sun
    ```

4. Save and close the file.

5. Log out, then log back in for the change to take effect.

6. Verify that the variables are properly set by opening a **Terminal** window and typing this.

    ```
    env | grep PENTAHO_JAVA_HOME
    ```

Install DI Design Tool and Plugins

There is one DI design tool (Spoon) and many plugins, including Instaview and Big Data. This step explains how to install them.

Choose Installation Method

There are two methods by which you can install the design tools and plugins: wizard and manual. Review the table to determine which method is best for you.

Table 1. DI Design Tools and Plugins Installation Decision Table

If You Are Interested In	Choose Options	
	Wizard	Manual
• Summary	The Wizard is the easiest way to install the DI Design Tool and Plugins. The Wizard allows you to install design tools and plugins on the server or client workstations.	The manual method allows you to manually copy design tool and plugin installation files to any directory on the server or client workstations.
• 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.**

Now that you have selected the installation method, follow the instructions in that section to install the design tool and plugins.

Install the Design Tool and Plugins

Install the design tool and plugins using the Wizard or Manual Methods.

Use the Wizard to Install DI Design Tool and Instaview Plugin

The easiest way to install the DI design tool, utilities, and Instaview plugin is to use the BA Installation Wizard using the custom method. As you follow the instructions, select the **Data Integration (ETL)** option when the **Pentaho Applications** window appears.

Use the Manual Method to Install DI Design Tool, Utilities, and Plugins
There are three different manual methods.

Use the Manual Method to Install DI Design Tool and Utilities

1. Download the `pdi-ee-client-5.2.0-dist.zip` file.
2. Extract the `pdi-ee-client-5.2.0-dist.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)
```

Use the Manual Method to Install Plugins
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.

Use the Marketplace to Install Plugins

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.

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=


   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


   #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



   #Name of the database used for instaview

   MonetDBDatabaseName=pentaho-instaview
   ```

```
MonetDBDefaultBufferSize=100000

MonetDBDefaultEncoding=UTF-8

MonetDBDefaultLogFile=


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


#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
```

Next Steps

Now that you have installed the Spoon design tool, the utilities, and the plugins, it is now time for you to configure the design tool.

Learn More

- Work through the Getting Started with DI tutorial.
- Try Instant Template-Based Analysis with Instaview.
- Learn more about how to Create DI Solutions.
- Work with Big Data.