Install Only DI Tools

Help and Support Resources

If you do not find answers to your quesions here, please contact your Pentaho technical support representative.

Support-related questions should be submitted through the Pentaho Customer Support Portal at http://support.pentaho.com.

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.

Liability Limits and Warranty Disclaimer

The author(s) of this document have used their best efforts in preparing the content and the programs contained in it. These efforts include the development, research, and testing of the theories and programs to determine their effectiveness. The author and publisher make no warranty of any kind, express or implied, with regard to these programs or the documentation contained in this book.

The author(s) and Pentaho shall not be liable in the event of incidental or consequential damages in connection with, or arising out of, the furnishing, performance, or use of the programs, associated instructions, and/or claims.

Trademarks

Pentaho (TM) and the Pentaho logo are registered trademarks of Pentaho Corporation. All other trademarks are the property of their respective owners. Trademarked names may appear throughout this document. Rather than list the names and entities that own the trademarks or insert a trademark symbol with each mention of the trademarked name, Pentaho states that it is using the names for editorial purposes only and to the benefit of the trademark owner, with no intention of infringing upon that trademark.

Third-Party Open Source Software

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.

Contact Us

Global Headquarters Pentaho Corporation
Citadel International, Suite 340
5950 Hazeltine National Drive
Orlando, FL 32822
Phone: +1 407 812-OPEN (6736)
Fax: +1 407 517-4575
http://www.pentaho.com

Sales Inquiries: sales@pentaho.com

Contents

Installation of DI Design Tool and Plugins Introduction

These instructions 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

Use the Wizard to Install DI Design Tool and Instaview Plugin

Perhaps the easiest way to install 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-5.0.0-dist.zip` file.
2. Extract the `pdi-ee-client-5.0.0-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 deteermine 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 Marketplac**e 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.

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\:\\PROGRA~1\\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
```
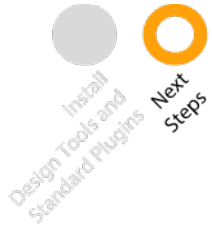
For any OS

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

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

Next Steps

Install
Design Tools and
Standard Plugins

Next
Steps

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