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Using This Book

Audience

The information in this document can be used by a SAS system administrator to install SAS Intelligence Platform on one or more machines.

Documentation Conventions

**SAS Installation Directory**

The phrase *SAS installation directory* refers to a host path. (The SAS installation directory is sometimes referred to as SASHome.) For example, `C:\Program Files \SASHome`.

**SAS Configuration Directory**

The phrase *SAS configuration directory* refers to a host path that includes a configuration name and level. For example, `C:\SAS\Config\Lev1`.

For more information, see the topic, “Overview of the Configuration Directory Structure,” in the *SAS Intelligence Platform: System Administration Guide.*
Using This Book
What's New in Installation and Configuration for the SAS 9.4 Intelligence Platform

Overview

The *SAS Intelligence Platform: Installation and Configuration Guide* explains how to install and initially configure the SAS Intelligence Platform. It contains enhancements and changes to the SAS 9.4 Intelligence Platform deployment tools.

For the May 2019 release of SAS 9.4M6:
- Languages supported have changed. For more information, see “Languages Supported Have Changed” on page viii.
- There is a new post-deployment step for SAS Web Server. For more information, see “New Post-Deployment Step for SAS Web Server” on page viii.
- The DB2 database must be configured to support MYS SQL grammar. For more information, see “DB2 and MYS SQL Grammar” on page viii.
- There is a new internal account - tdadm. This is the user ID and password for accessing the database used with SAS Application Themes. For more information, see “Internal User Accounts” on page 8.

For SAS 9.4M4:
- Deployment certificate information is relocated.

For SAS 9.4M3:
- Password prompts can be reduced.
- Re-entry into the SAS Deployment Wizard during SAS installation is supported.
- Optimizing SAS Software Depots is available.
- SAS Software Depot subsetting is improved.

For the October 2014 release of SAS 9.4 (SAS 9.4, Rev. 940_14w41):
- SAS Visual Analytics Administration and Reporting is supported.

For SAS 9.4M2:
- The ability to update your SAS documentation only is supported.
- Tuning SAS Web Application Servers is supported.
- SAS Metadata Server clustering is supported on z/OS.

For SAS 9.4:
- SAS Studio is supported.
• Installing MSI-based packages for SAS Enterprise Guide and SAS Add-In for Microsoft Office is supported.
• The SAS Deployment Agent is available.
• Subsetting SAS Deployment Wizard recipes is supported.
• The Locale Setup Manager task is enhanced.
• Uninstalling SAS software is supported.

Languages Supported Have Changed

SAS switched from delivering localized resources in specific Chinese cultures (for example, zh-CN, zh-TW, and zh-HK) to delivering localized resources in neutral Chinese cultures (zh-Hans and zh-Hant). For more information, see “Locale and Encoding Settings in the Deployment Wizard” on page 80.

New Post-Deployment Step for SAS Web Server

If you are using SAS Visual Analytics 7.5 or higher, the sas.conf file must be modified for Microsoft SharePoint to work with SAS Visual Analytics. For more information, see Step 11 on page 153.

DB2 and MYS SQL Grammar

The DB2 database must be configured to support MYS SQL grammar. For more information, see “DB2” on page 211.

Information about Certificates Moved

In SAS 9.4M4, the chapter “Setting Up Certificates for SAS Deployment,” has been integrated into the following documents:

• SAS Intelligence Platform: Middle-Tier Administration Guide
• Encryption in SAS
• SAS Intelligence Platform: Security Administration Guide
Password Prompt Reductions

In SAS 9.4M3, the SAS Deployment Wizard enables you to reduce the number of password prompts. For more information, see “Reducing the Number of Password Prompts” on page 73.

Re-entry into SAS Deployment Wizard

In SAS 9.4M3, a re-entry feature has been added to the SAS Deployment Wizard. For more information, see “Re-entry Feature of the Deployment Wizard” on page 74.

Support for Optimizing SAS Software Depots

In SAS 9.4M3, support has been added for optimizing SAS Software Depots. For more information, see information about how to Remove duplicate files and save space on page 38.

Improved SAS Software Depot Subsetting

In SAS 9.4M3, improvements have been made to how you can subset SAS Software Depots. For more information, see Subsetting SAS Software Orders on page 48.

SAS Visual Analytics Administration and Reporting

Starting in October 2014 (SAS 9.4, Rev. 940_14w41), SAS provides SAS Visual Analytics Administration and Reporting with most SAS solution software orders. For more information, see “SAS Visual Analytics Administration and Reporting” on page 75.

Update Your SAS Documentation Only

In SAS 9.4M2, the SAS Deployment Wizard enables you to install only the newly released documentation. For more information, see “Update Your SAS Documentation Only” on page 75.
Support for SAS Web Application Servers Tuning

In SAS 9.4M2, the SAS Deployment Wizard enables you to specify the size of your SAS Web Application Server based on number of users and workload. For more information, see “Estimated System Size” on page 107.

Support for SAS Metadata Server Clustering on z/OS

In SAS 9.4M2, SAS Metadata Server clustering is also supported on z/OS. For more information, see “Metadata Server Clustering” on page 77.

Support for SAS Studio

In the March 2014 release of SAS 9.4, the SAS Deployment Wizard supports the installation and configuration of SAS Studio.

MSI-Based Packages for SAS Enterprise Guide and SAS Add-In for Microsoft Office

In SAS 9.4, there is another installation option for SAS Enterprise Guide and SAS Add-In for Microsoft Office. This additional option has packages based on a Microsoft installer (MSI) that are much smaller in size than the SAS Software Depot. These MSI-based packages enable administrators to install these two SAS products over a distributed deployment using software provisioning tools such as Microsoft System Center Configuration Manager (SCCM). This new installation option is available only on Windows.

For more information, see the SAS Deployment Wizard and SAS Deployment Manager: User's Guide.

SAS Deployment Agent

The SAS Deployment Agent is required for deployments that run remote processes. SAS uses the agent to copy content and to perform configuration management operations associated with creating new servers and clustering. It is also used for server administration tasks such as deployment backups. For more information, see “SAS Deployment Agents” on page 75.
Subset Recipes

The SAS Deployment Wizard enables you to subset your SAS order using recipes. A subset recipe is an XML file that contains a formula that the wizard uses to assemble pieces of the SAS Software Depot to subset your order for a particular SAS product or group of products (for example, SAS Enterprise Guide or SAS Add-In for Microsoft Office). For more information, see “Subset an Order” on page 48.

Locale Setup Manager Task

On Windows and UNIX machines, you can use the Locale Setup Manager task in the SAS Deployment Manager to configure the language and region for SAS Foundation and certain SAS applications. For more information, see “Change Locale for SAS” on page 207.

Uninstall SAS Software Task

On Windows and UNIX machines, you can use the Uninstall SAS Software task in the SAS Deployment Manager to remove SAS software. There is also a silent uninstall option. For more information, see “Uninstalling Your SAS Software” on page 232.
What Is the SAS Intelligence Platform?

The SAS Intelligence Platform is a comprehensive, end-to-end infrastructure for creating, managing, and distributing enterprise intelligence. The SAS Intelligence Platform comprises the following software offerings:

- SAS BI Server
- SAS Enterprise BI Server
- SAS Data Management (Standard or Advanced) and other related offerings for data management, data quality, and data governance

SAS Data Integration Server has been revised, and SAS Enterprise Data Integration Server is available only as a renewal.

Solutions for enterprise intelligence, customer intelligence, and financial intelligence are built on the SAS Intelligence Platform, as well as turnkey solutions for specialized markets in life sciences, health care, retail, manufacturing, and others. Therefore, if your SAS deployment plan includes a SAS solution, then the SAS Intelligence Platform documentation also pertains to you.

The SAS Intelligence Platform library provides information for platform offerings, which include products and components such as the SAS Metadata Server, SAS Integration Technologies, and the SAS OLAP Server. See SAS Intelligence Platform Documentation for more information about these software offerings and their components.

What Is Covered in This Document?

This document covers activities that begin after you and your SAS representative have decided what software you need and on what machines software is installed. At this
point, you can begin performing some pre-installation tasks, such as creating operating system user accounts and designating ports that you will use during installation.

This document covers all of the pre-installation, installation, and configuration tasks that you must perform to deploy the SAS Intelligence Platform on either a single machine or in a distributed, heterogeneous environment. By the time you reach the end of this document, all of your SAS servers, middle-tier servers, and clients will be functional.

Installing the software will be easier if you read the following documents as well:

- **SAS Intelligence Platform: Overview** to understand the architecture of the SAS system.

- Configuration documentation for SAS solutions. Many of the solutions leverage the functionality of the SAS Intelligence Platform. If your SAS deployment plan includes a solution, then you might be referred to additional solution-specific configuration information.

If you have licensed SAS solutions, consult with your SAS representative for more information.

---

**Deploying the SAS Intelligence Platform**

**Deployment Process Overview**

The following list summarizes the steps required to install and configure the SAS Intelligence Platform on a single machine or in a distributed, heterogeneous environment. The first three steps are pre-installation tasks and can be performed in any order. Perform step 4 after steps 1 through 3 are completed.

1. Plan your deployment and review additional documentation.
2. Create users and groups and designate ports.
3. Create a SAS Software Depot.
4. Install required third-party software.
5. Install and configure SAS.

Subsequent chapters provide more detail and step-by-step instructions.
Chapter 2
Planning Your Deployment and Reviewing Additional Documentation

Deployment Process Overview: Step One

This chapter describes how to plan your SAS deployment and lists additional documentation that you should review.

1. Plan your deployment and review additional documentation.
2. Create users and groups and designate ports.
3. Create a SAS Software Depot.
4. Install required third-party software.
5. Install and configure SAS.

It is very important to plan your deployment and to review additional documentation associated with your deployment. This includes late-breaking information or instructions specific to a particular configuration not covered in the SAS Intelligence Platform: Installation and Configuration Guide.

Participating in SAS community online forums can help you plan your deployment:

- Administration and Deployment community
- SAS Hot Fix Announcements community

Planning Your Deployment

The deployment plan is an XML file that is used as input to the SAS Deployment Wizard. It describes the topology of your SAS system. The plan instructs the SAS Deployment Wizard what software to install and configure on each machine in a SAS deployment.
There are two types of deployment plans: standard and custom. A standard deployment plan describes a common configuration. Standard deployment plans are provided in the SAS Deployment Wizard. A custom deployment plan is created by you and your SAS representative specifically for your site. You and your SAS representative record decisions about software and the hardware on which that software will be installed. This information is used to generate a custom deployment plan file. If your environment requires a custom plan, SAS sends you an email message with an XML file (or a ZIP file containing an XML file). Those files include the following:

The Deployment File (plan.xml)
This is one of the key files that are used throughout the rest of the deployment process to customize your installation and configuration experience. The plan.xml file serves as input to the SAS Deployment Wizard. Copy this set of files to the Plan_Files folder on the top level of the SAS Software Depot.

The Pre-installation Checklist (checklist.pdf or checklist.rtf)
This is where you record information such as the credentials for special SAS users, machine names, ports, and the installation locations of third-party products relevant to your deployment.

The Index File (index.html)
This file provides some high-level guidance through the remainder of the process. The index.html file includes a reference to a pre-installation checklist, which is for the information that you need to know for the remainder of the process. Information that you enter in the checklist is requested in later stages of the installation process. It is important that you record the information for later use to ensure consistency and to document decisions that you made.

---

**Providing Access to a Local Version of the Documentation**

Most SAS web applications support local access to SAS documentation. Here are two instances where this might be useful:

- You have customized SAS documentation.
- Your SAS system is highly secure, and it does not have access to the internet. Because SAS documentation is hosted in the cloud, it cannot be reached without internet access.

You can download PDF versions of SAS documentation or you can create customized versions. You can create an HTML page with links to the local documentation, and then create a link to this page.

To configure local documentation:
2. Expand Application Management.
3. Expand Configuration Manager.
4. Right-click SAS Application Infrastructure, and select Properties.
5. Click on the Advanced tab.
6. Add the following two properties:
1. HelpMenuLink. For *Property Value*, specify the path to the HTML page that contains links to your local documentation.

2. HelpMenuLinkName. For *Property Value*, enter a meaningful label for the link.

7. Click **OK**.

Users see a new item in the **Help** menu, between the Help Center and About items. Clicking this link opens the specified HTML page.

---

**Reviewing Additional Documentation**

Review these additional documents for valuable information:

- **Usage Notes**
  

  *Note:* In particular, review **Usage Note 42197**, which provides a portal to relevant papers such as *Grand Designs: Why It Pays to Think About Technical Architecture Design Before You Act* and *How to Maintain Happy SAS 9 Users*.

- **system requirements**
  
  SAS system requirements are available at [http://support.sas.com/resources/sysreq/index.html](http://support.sas.com/resources/sysreq/index.html).

- **SAS Security Bulletins**
  

- **QuickStart Guides**
  
  QuickStart Guides are provided with your SAS software. QuickStart Guides are also available online:

    - **UNIX:** [http://support.sas.com/documentation/installcenter/94/unx/index.html](http://support.sas.com/documentation/installcenter/94/unx/index.html)
    - **z/OS:** [http://support.sas.com/documentation/installcenter/94/mvs/index.html](http://support.sas.com/documentation/installcenter/94/mvs/index.html)

- **software order email (SOE)**
  
  The SOE details your order. It provides initial installation steps. For SAS 9.4, it contains instructions for using Electronic Software Delivery (ESD), if applicable.

- **SAS order information (SOI)**
  
  After you download your order to an existing SAS Software Depot, you can use the SAS order information (SOI) file to determine what software was in your order and when the order was placed. The SOI is in your SAS Software Depot at `install_doc/order-number/soi.html`.

- **SAS software summary**
  
  In the same SAS Software Depot as the SOI, the SAS software summary is a more detailed list of the software in your order. Unlike the SAS order information sheet, which lists only the software that you have specifically ordered, the SOI describes the included software that supports the software in your order. The SAS software
summary is in your SAS Software Depot at `install_doc/order-number/ordersummary.html`.

*Note:* The SAS Deployment Wizard installs only what is listed in the deployment plan. The SAS software summary might list more products than the deployment plan. For more information, see “About Deployment Plans” on page 72.
Chapter 3
Creating Users and Groups
and Designating Ports

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Deployment Process Overview: Step Two

Before you begin installing and configuring your software, you must create required users and groups at the operating system level. You must designate TCP/IP ports for the servers to use.

1. Plan and review additional documentation.

2. Create operating system users and groups and designate ports.

3. Create a SAS Software Depot.

4. Install required third-party software.

5. Install and configure SAS.

Defining User Accounts

Overview of Defining User Accounts

There are two types of user accounts when deploying SAS:

- **Internal user accounts** are accounts known only to SAS. They are created and authenticated internally in SAS metadata rather than externally.

- **External user accounts** are accounts created outside of SAS metadata. These accounts are local to a machine or they are defined in a network directory service of which the machine is a member, such as LDAP.

The following sections describe the user accounts that SAS and third-party software require. These sections help you answer the following questions:

- What are internal and external user accounts?

- What user rights does each account have and to what groups must each account be assigned?

- Should I create local or network directory service accounts?

- What password policies should I enforce?

Internal User Accounts

SAS identifies internal user accounts by appending a special string to the user ID. This string begins with an at sign (@) and contains saspw (for example, @saspw). For two of the required user accounts—the SAS Administrator and the SAS Trusted User—the SAS Deployment Wizard prompts you by default to create internal user accounts.

The following table shows the default internal user accounts required by SAS. (SAS internal user accounts are authenticated on the SAS Metadata Server.)

<table>
<thead>
<tr>
<th>Description</th>
<th>User ID</th>
</tr>
</thead>
</table>

---
SAS Administrator
This user account has privileges associated with the Metadata Server:
Unrestricted role.

Sasadm@saspw

SAS Trusted User
This user account can impersonate other users on connections to the
SAS Metadata Server. Some SAS processes use this account to
communicate with the metadata server on a client's behalf.

Sastrust@saspw

SAS Environment Manager Service
This user account is used by the SAS Environment Manager Server
and its agent to communicate while monitoring the processes in your
SAS deployment. This internal user account has unrestricted
administrative access rights to the SAS Metadata Server.

Sasevs@saspw

SAS Anonymous Web User
This user account is an optional user account that is used to grant
web clients access to applicable SAS Web Infrastructure Platform
components. When web clients request access to web services, they
are not prompted for credentials. Instead, they are granted access
under this user account.

Webanon@saspw

The following table shows additional internal user accounts:

<table>
<thead>
<tr>
<th>Description</th>
<th>User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>dbmsowner</td>
<td>dbmsowner</td>
</tr>
<tr>
<td>This is the user ID and password for accessing the SAS Web Infrastructure Platform Data Server. This is the owner of all databases.</td>
<td></td>
</tr>
<tr>
<td>tdadm</td>
<td>tdadm</td>
</tr>
<tr>
<td>This is the user ID and password for accessing the database used with SAS Application Themes.</td>
<td></td>
</tr>
<tr>
<td>SharedServices</td>
<td>SharedServices</td>
</tr>
<tr>
<td>This is the user ID and password for accessing the SharedServices database used by the SAS Web Infrastructure Platform.</td>
<td></td>
</tr>
<tr>
<td>adminowner</td>
<td>adminowner</td>
</tr>
<tr>
<td>This is the user ID and password for accessing the Administration database used by the SAS Environment Manager.</td>
<td></td>
</tr>
<tr>
<td>sasevdb</td>
<td>sasevdb</td>
</tr>
<tr>
<td>This is the user ID and password for the Environment Manager Enablement Kit Database.</td>
<td></td>
</tr>
</tbody>
</table>
This is the user ID and password for accessing the EVManager database used by the SAS Environment Manager.

For more information about SAS internal user accounts and their purposes, see “Understanding the State of Your System” in SAS Intelligence Platform: System Administration Guide.

Here are some benefits of internal user accounts:

- **less maintenance**
  The account is defined only once in SAS. You do not define this account externally using the authentication provider.

- **isolation from the host machine security policy**
  The SAS Administrator and the SAS Trusted User credentials are referenced in many locations within SAS. For example, forcing a recurring password change (a common security policy) might make unnecessary work for the person administering SAS.

- **independence from IT**
  You can create additional SAS unrestricted user and administrative user accounts for metadata management without involvement from your IT department.

- **reduced “headless” external user accounts**
  The SAS Trusted User is an account used for SAS inter-process communication. It will not be mistaken for a human user.

- **minimal security exposure to your enterprise**
  The SAS Administrator and the SAS Trusted User are highly privileged accounts and provide access only to SAS—not to operating system resources.

**Required External User Accounts for SAS**

External user accounts are accounts created outside of SAS metadata. These accounts are local to a machine or they are defined in a network directory service of which the machine is a member, such as LDAP. SAS requires external user accounts for two purposes: installation and running certain SAS server processes.

During installation and configuration, the SAS Deployment Wizard must run under an external account with the necessary privileges on the target machine to write SAS program and log files. To run servers such as the SAS Stored Process Server and the SAS Pooled Workspace Server, SAS requires an external user account to be the server process owner. For more information about external user accounts and their purposes, see the SAS Intelligence Platform: System Administration Guide.

As you set up external accounts, remember to use different external accounts for the First User and the SAS Spawned Servers Account user. Otherwise, your configuration will end in errors and the SAS Pooled Workspace Server will not be functional.

As you create these external user accounts, record information about them in “Pre-installation Checklist for External User Accounts for SAS on Windows and UNIX” on
You will need this information when you run the SAS Deployment Wizard later.

**Note:** To validate your SAS deployment, you need an external user account that is representative of a SAS client user, such as a user of SAS Data Integration Studio. This external user account is the temporary process owner when its jobs are run on a standard SAS Workspace Server. If Integrated Windows Authentication (IWA) is not being implemented, it can be helpful to use the SAS Deployment Wizard to create a First User account (sasdemo) in metadata during deployment for validation purposes. The wizard will assign the required **Log on as a batch job** Windows user that is right for you.

The following table shows external user accounts required by SAS and the machines on which they are authenticated.

**Table 3.3 Required External User Accounts for SAS**

<table>
<thead>
<tr>
<th>Description</th>
<th>Recommended User ID</th>
<th>Machine On Which It Is Authenticated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installer</td>
<td>sas</td>
<td>Every machine</td>
</tr>
<tr>
<td>Installer</td>
<td></td>
<td>The account used to install SAS.</td>
</tr>
<tr>
<td>SAS Spawned Servers Account</td>
<td>sasrv</td>
<td>SAS Stored Process Server</td>
</tr>
<tr>
<td>SAS Spawned Servers Account</td>
<td></td>
<td>SAS Pooled Workspace Server</td>
</tr>
</tbody>
</table>

**Note:**

- For information about the user rights that each external account requires, see “Rights Required by External User Accounts for SAS” on page 12.
- UNIX: the Installer generally overrides the default configuration directory with the site's preferred location (for example, /opt/sas/config). The Installer must have Write permission on this path.
- Windows: The Installer user ID must be available in the long term for future SAS maintenance.
- UNIX: Do not use root for the Installer user ID.
- AIX: For both user IDs, make sure that the **User can LOGIN?** setting is set to **true**.
- z/OS: The Installer and the SAS Spawned Servers Account must have a TSO segment defined.
- z/OS: Here are some details about Installer:
  - It is the started task owner for the servers.
  - It is the owner of the configuration directory structure.
  - It must have a writable home directory in the UNIX file system.
  - It must have an OMVS segment definition with the following minimum settings:
    - ASSIZEMAX of at least 2 GB
    - CPUTIMEMAX of at least 5000 seconds
Rights Required by External User Accounts for SAS

Operating systems require that you assign certain rights to the external user accounts used to deploy and to run SAS.

The following table describes the user rights needed by the required external user accounts:

Table 3.4 Rights Required by External User Accounts for SAS

<table>
<thead>
<tr>
<th>External User Account</th>
<th>Operating System</th>
<th>User Rights Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installer</td>
<td>Windows</td>
<td>Administrator rights</td>
</tr>
<tr>
<td>UNIX</td>
<td>The primary group for the Installer must contain the SAS Spawned Servers Account.</td>
<td></td>
</tr>
<tr>
<td>z/OS</td>
<td>The primary group for the Installer must contain the SAS Spawned Servers Account.</td>
<td></td>
</tr>
<tr>
<td>SAS Spawned Servers Account</td>
<td>Windows</td>
<td><strong>Log on as a batch job</strong></td>
</tr>
<tr>
<td>UNIX</td>
<td>Member of the primary group for the Installer.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(This group does not have to be the primary group for the SAS Spawned Servers Account.)</td>
<td></td>
</tr>
<tr>
<td>z/OS</td>
<td>Member of the primary group for the Installer.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(This group does not have to be the primary group for the SAS Spawned Servers Account.)</td>
<td></td>
</tr>
</tbody>
</table>

* The SAS Deployment Wizard automatically assigns the Windows user right **Log on as a batch job** to the SAS Spawned Servers Account.

On Windows, if you choose to run your SAS servers using management scripts instead of running them as Windows services, then the user account that runs the object spawner must meet the following requirements on the object spawner machine:

- It must be the administrator or a member of the Windows Administrators group.
- It must have the following Windows local user rights:
  - **Adjust memory quotas for a process**
  - **Replace a process level token**

Required External User Accounts for Third-Party Software

The following table describes the external user accounts required by third-party software and the machines on which they are authenticated. These accounts are either local to a machine or they are defined in a network directory service of which the machine is a member.
Table 3.5  Required External User Accounts for Third-Party Software

<table>
<thead>
<tr>
<th>Description</th>
<th>Recommended User ID</th>
<th>Machine On Which It Is Authenticated</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSF Administrator</td>
<td>lsfadmin</td>
<td>Every Platform Process Manager and Platform LSF machine</td>
</tr>
<tr>
<td>Process owner for Platform LSF services and daemons. This account is required if you install Platform Suite for SAS to support scheduling or grid computing. This account owns the LSF configuration and log files and has permission to perform cluster-wide operations, edit configuration files, and reconfigure a cluster.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LSF User</td>
<td>lsfuser</td>
<td>Platform Process Manager</td>
</tr>
<tr>
<td>Sometimes referred to as the scheduling user. This account is required by SAS Web Report Studio to run the output generation tool, which creates scheduled reports in batch mode.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

As you create these external user accounts, record information about them in “Pre-installation Checklist for External User Accounts for SAS on Windows and UNIX” on page 14. You will need this information when you run the SAS Deployment Wizard.

Note: For information about the user rights that each account requires, see “Rights Required by External User Accounts for Third-Party Software” on page 13.

Rights Required by External User Accounts for Third-Party Software

The following table describes the user rights needed by the required external user accounts:

Table 3.6  Rights Required by External User Accounts for Third-Party Software

<table>
<thead>
<tr>
<th>External User Account</th>
<th>Operating System</th>
<th>User Rights Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSF Administrator</td>
<td>Windows</td>
<td>Administrator rights</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adjust memory quotas for a process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Debug programs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Log on as a service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Replace a process level token</td>
</tr>
<tr>
<td>LSF User</td>
<td>Windows</td>
<td>Log on as a batch job or Allow log on locally</td>
</tr>
</tbody>
</table>

Local or Directory Service Accounts?

SAS relies on its various server machines to authenticate external user accounts. In turn, the SAS server machine authenticates user accounts using an authentication provider. An authentication provider refers to an authentication service that is one of the following:
local to a machine and used to authenticate local host user accounts
available to a machine, defined in a network, and used to authenticate directory service accounts such as LDAP or Active Directory

You can create either local or directory service accounts for external users. The only requirement is that each user shown in Table 3.3 on page 11 can be authenticated by the machine's authentication provider. The authentication provider can be local to the machine or available to the machine through a directory service.

The main advantage of local accounts is that if account information were to get into the wrong hands, the credentials could be used to log on only to the machine or machines that can authenticate the credentials. A secondary advantage is that the host could continue to authenticate users even if the directory service authentication provider were unavailable.

The advantage of directory service accounts is that you do not have to create the same accounts on multiple machines or keep the account information synchronized across machines. The directory service authentication provider does all of that for you.

For example, setting up the SAS Spawned Servers Account is usually straightforward. The SAS Spawned Servers Account must be able to be authenticated by the SAS Pooled Workspace Server and SAS Stored Process Server machine. If these servers are distributed on more than one machine, then each machine must be a member of the same directory service or in different directory services between which a trust has been established.

Password Policies

Note: This section addresses passwords for external user accounts that SAS requires, not passwords for regular users of the system.

When you create passwords for your SAS external user accounts, it is highly recommended that these passwords do not have to be reset when a user first logs on. If it is required that you create passwords that have to be reset, you will have to log on using each account and reset the password before you install and configure your software. And, you will need to know the changed password for each account.

By default, passwords for internal user accounts are set not to expire. When passwords for user accounts change, you must use SAS Deployment Manager to update configuration files and some metadata objects. SAS provides instructions for updating these files and metadata objects.

For more information, see “Update a Managed Password” in SAS Intelligence Platform: Security Administration Guide.

Pre-installation Checklist for External User Accounts for SAS on Windows and UNIX

Use a pre-installation checklist to create the necessary external user accounts to deploy and run SAS on Windows and UNIX.

Note: More complete and up-to-date checklists are available at http://support.sas.com/installcenter/plans.
Table 3.7 Pre-installation Checklist for External User Accounts for SAS on Windows and UNIX

<table>
<thead>
<tr>
<th>Account</th>
<th>Recommended User ID</th>
<th>Actual User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installer</td>
<td>Windows: my-domain/installer-ID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UNIX: sas,</td>
<td></td>
</tr>
<tr>
<td>SAS Spawned Servers</td>
<td>Windows: my-domain\sasrv</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>UNIX: sassrv</td>
<td></td>
</tr>
</tbody>
</table>

* On Windows, the user ID should be available in the long term for future SAS maintenance.
** On AIX, make sure that the User can LOGIN? setting is set to true for the user.
*** On UNIX, do not use root.

Note: During deployment, the Installer must have Write permission to /etc/opt/vmware to configure VMware license files on all SAS middle-tier machines.

Consider these important items:

- For information about the user rights that each external account requires, see “Rights Required by External User Accounts for SAS” on page 12.
- The SAS Deployment Wizard prompts you for the Installer account and the SAS Spawned Servers Account information. You cannot complete the installation without supplying it.
- Certain SAS products and features use functionality that requires SAS to check user ID authentication and file access authorizations. This means that certain files within your SAS installation must have setuid permissions and be owned by root. SAS provides a script to set these permissions. This script, setuid.sh, must be run as root to complete successfully. You have three options for running setuid.sh:
  - Set up sudo for the Installer before running the SAS Deployment Wizard to not be prompted for the sudo password. The wizard running under the Installer account will have sudo privileges to run setuid.sh.
  - Provide the sudo password when prompted by the SAS Deployment Wizard and allow the wizard to run setuid.sh as sudo.
  - When the SAS Deployment Wizard is paused, run setuid.sh yourself. When the script is completed, resume running the wizard.
- If your UNIX system uses an authentication method other than /etc/passwd or /etc/shadow, then you must configure authentication before you begin your SAS software deployment or SAS will not function properly. For more information, see the Configuration Guide for SAS Foundation for UNIX Environments.

Pre-installation Checklist for External User Accounts for Third-Party Software

Use a pre-installation checklist to create the necessary external user accounts to deploy and run third-party software.

Note: The SAS Deployment Wizard prompts you for this information. You cannot complete the installation without it.
Table 3.8 Pre-installation Checklist for External User Accounts for Third-Party Software

<table>
<thead>
<tr>
<th>Account</th>
<th>Recommended User ID</th>
<th>Actual User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSF Administrator</td>
<td>Windows: my-domain\lsfadmin</td>
<td>UNIX: lsfadmin</td>
</tr>
<tr>
<td>LSF User</td>
<td>Windows: my-domain\lsfuser</td>
<td>UNIX: lsfuser</td>
</tr>
</tbody>
</table>

Note: For information about the user rights that each external account requires, see “Rights Required by External User Accounts for Third-Party Software” on page 13.

Pre-installation Checklist for External User Accounts for SAS on z/OS

Use a pre-installation checklist to create the necessary external user accounts to deploy and run SAS on z/OS. Record information about them in this checklist.

Note: The SAS Deployment Wizard prompts you for this information and you cannot complete the installation without it.

Note: More complete and up-to-date checklists are available at http://support.sas.com/installcenter/plans.

Table 3.9 Pre-installation Checklist for External User Accounts for SAS on z/OS

| Account                      | Recommended User ID | Actual User ID | |
|------------------------------|---------------------|----------------|
| Installer                    | sas                 |                | |
| SAS Spawned Servers Account  | sassrv              |                | |

Note:

- For information about the user rights that each external account requires, see “Rights Required by External User Accounts for SAS” on page 12.
- The Installer and the SAS Spawned Servers Account must have a TSO segment defined.
- Here are some details about the Installer:
  - It is the started task owner for the servers.
  - It is the owner of the configuration directory structure.
  - It must have a writable home directory in the UNIX file system.
  - It must have an OMVS segment definition with the following minimum settings:
    - ASSIZEMAX of at least 2 GB
Defining Groups

Overview of Defining Groups

On UNIX, adding users to a group is required to assign the necessary operating system privileges to deploy and run SAS. Using a group is one method for granting the corresponding user rights needed on Windows.

The SAS Server Users Group (Windows)

To deploy SAS on Windows, the user must have certain local user rights on the machine hosting the server. These rights are required before the user can start a process for a SAS Stored Process Server, a SAS Pooled Workspace Server, or a standard SAS Workspace Server. One suggestion for granting these rights is to create a group, add users to the group, and then assign the rights to the group. (The scheduling user, Lsfuser—which is required if you are scheduling reports—must have these rights.)

Note: Not all of these user accounts exist in every installation. You add only those that you have created. In addition, if you are working in a multi-machine environment and you are using local groups, not all of the users that you have created need to be included in every local group. You need to include only the users who will be authenticated by a SAS Stored Process Server, SAS Pooled Workspace Server, or standard SAS Workspace Server on a given machine. On some machines (for example, a machine hosting middle-tier components), there might be no need for the group at all.

To set up a group, complete these steps:

1. Create a SAS server users group. This can be a local group or a group with domain scope.

2. Add the following users to the group:
   - SAS Spawned Servers Account
   - First User (optional account)
   - LSF User
   - any other external users that need to access a standard SAS Workspace Server

Note: The SAS Deployment Wizard automatically grants the Windows user right Log on as a batch job to the SAS Spawned Servers Account. If you use the wizard to create the optional First User account in metadata, the wizard also automatically grants the Log on as a batch job Windows user right to this First User account. If Integrated Windows Authentication (IWA) is implemented, this user right is not required for the First User and other regular SAS users who access standard SAS Workspace Servers, such as SAS Data Integration Studio or SAS Enterprise Guide users.

3. Grant the user right Log on as a batch job to the group. For information about setting local user rights, see your Microsoft Windows documentation. If the users in
the group need that right on more than one Windows machine, the right needs to be assigned specifically on each machine.

**The sas Group (UNIX)**

To deploy SAS on UNIX, you should create an operating system group called sas and make it the primary group for the UNIX Installer user. The SAS Spawned Servers Account should be made a member of the sas group. (Members of this group are given access to certain directories and files created by the SAS Deployment Wizard.)

For information about creating groups and adding user accounts, see your UNIX documentation.

**The SASGRP Group (z/OS)**

To deploy SAS on z/OS, you should create a RACF group named SASGRP. This group is used to control access to directories and files in the configuration directory created in the HFS file system. The definition of this RACF group must include an OMVS segment and must be set as the default group for the Installer and the SAS Spawned Servers Account.

For information about creating groups and adding user accounts, see your IBM z/OS documentation.

**Pre-installation Checklist for Groups for SAS on Windows and UNIX**

Use a pre-installation checklist to make sure that you have created the necessary groups to deploy and run SAS on Windows and UNIX. Record information about them in this checklist.

*Note:* More complete and up-to-date checklists are available at [http://support.sas.com/installcenter/plans](http://support.sas.com/installcenter/plans).

**Table 3.10 Pre-installation Checklist for Groups for SAS on Windows and UNIX**

<table>
<thead>
<tr>
<th>Recommended Group Name</th>
<th>Group Members</th>
<th>Operating System and Purpose</th>
<th>Actual Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS Server Users</td>
<td>SAS Spawned Servers Account</td>
<td>Windows</td>
<td>This is the suggested method for assigning the Log on as a batch job user right to the SAS Spawned Servers Account for the SAS Stored Process Server and SAS Pooled Workspace Server.</td>
</tr>
<tr>
<td>First User</td>
<td>Any other users</td>
<td>This is the suggested method for assigning the Log on as a batch job user right to the First User and any other standard SAS Workspace Server users.</td>
<td></td>
</tr>
<tr>
<td>Recommended Group Name</td>
<td>Group Members</td>
<td>Operating System and Purpose</td>
<td>Actual Group Name</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------</td>
<td>------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>sas</td>
<td>Installer</td>
<td>UNIX</td>
<td>SASGRP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This is the primary group for</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>the Installer user. It</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>enables the SAS Deployment</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Wizard to create the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>necessary log and</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>configuration directories</td>
<td></td>
</tr>
<tr>
<td>SAS Spawned Servers</td>
<td></td>
<td>Through group membership,</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td></td>
<td>this group grants Write</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>permissions to the SAS</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spawned Servers Account for</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>modifying specific SAS log</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>and configuration</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>directories.</td>
<td></td>
</tr>
</tbody>
</table>

* Unless Integrated Windows Authentication (IWA) is implemented, add any external users accessing standard SAS Workspace Servers.

** Limit membership because this privileged group has operating system access to certain configuration files.

### Pre-installation Checklist for Groups for Third-Party Software

Use a pre-installation checklist to create the necessary groups to deploy and run third-party software. Record information about them in this checklist.

*Note:* More complete and up-to-date checklists are available at [http://support.sas.com/installcenter/plans](http://support.sas.com/installcenter/plans).

**Table 3.11** Pre-installation Checklist for Groups for Third-Party Software

<table>
<thead>
<tr>
<th>Recommended Group Name</th>
<th>Group Members</th>
<th>Operating System and Purpose</th>
<th>Actual Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS Server Users</td>
<td>Scheduling user (lsfuser)</td>
<td>Windows</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>This is the suggested method for assigning the <strong>Log on as a batch job</strong> user right to scheduling users.</td>
<td></td>
</tr>
</tbody>
</table>

### Pre-installation Checklist for Groups for SAS on z/OS

Use a pre-installation checklist to create the necessary groups to deploy and run SAS on z/OS. Record information about them in this checklist.

*Note:* More complete and up-to-date checklists are available at [http://support.sas.com/installcenter/plans](http://support.sas.com/installcenter/plans).

**Table 3.12** Pre-installation Checklist for Groups for SAS on z/OS

<table>
<thead>
<tr>
<th>Recommended Group Name</th>
<th>Group Members</th>
<th>Purpose</th>
<th>Actual Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SASGRP</td>
<td>Installer</td>
<td>This is the default group for the Installer user.</td>
<td></td>
</tr>
</tbody>
</table>
### Recommended Group Name

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Group Members</th>
<th>Purpose</th>
<th>Actual Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS Spawned Servers Account</td>
<td>Through group membership, this group grants Write permissions to the SAS Spawned Servers Account for modifying SAS log and configuration directories.</td>
<td><em>The definition of this RACF group must include an OMVS segment. Limit membership because this privileged group has operating system access to certain configuration files.</em></td>
<td></td>
</tr>
</tbody>
</table>

### Additional z/OS Pre-installation Tasks

#### About Additional z/OS Pre-installation Tasks

In addition to creating the necessary users, groups, and ports to deploy the SAS Intelligence Platform on z/OS, you must perform the tasks in the following sections.

#### Create a Configuration Directory and Define the SAS Library on z/OS

On z/OS:

- Create a directory that will serve as the configuration directory for the SAS server tier on the z/OS machine.
- Define the SAS executable library to be program-controlled.

Record information in this checklist.

<table>
<thead>
<tr>
<th>Task</th>
<th>Actual Directory or Library Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a configuration directory for the SAS server tier.</td>
<td></td>
</tr>
<tr>
<td>Define the SAS executable library to be program-controlled.</td>
<td></td>
</tr>
</tbody>
</table>

* A typical path is /usr/lpp/SAS/SAS_9.4/configuration-directory.

### Install the SAS 9.4 SVC Routine

On z/OS, you must install the SAS 9.4 SVC routine. To install the SAS 9.4 SVC routine, follow these steps:

2. Using FTP, transfer the instsvc.xmit file (in binary mode) to your z/OS system. You should preallocate the target data set with the following DCB characteristics:
3. Submit a RECEIVE command to create a PDS that will contain the JCL members that are required to install the SVC routine. In the command, sas94.instsvc.xmit is the name of the file to which you transferred the instsvc.xmit file using FTP.

   receive indataset(sas94.instsvc.xmit)

   Respond with the name of a data set that will contain the JCL members by issuing the following command:

   da(sas94.instsvc.cntl)


   • Anywhere that the documentation refers to the BAMISC data set, use the CNTL data set that you created in step 3.
   • Anywhere that the documentation refers to the SAS.LIBRARY data set, use the CNTL data set that you created in step 3.

---

**Install the SAS 9.4 SASCP Module**

On z/OS, you must install the SAS 9.4 SASCP module. To install the SAS 9.4 SASCP module, follow these steps:


2. Using FTP, transfer the instsascp.xmit file (in binary mode) to your z/OS system. You should preallocate the target data set with the following DCB characteristics:

   LRECL=80
   BLKSIZE=3120
   RECFM=FB

3. Submit a RECEIVE command to create a PDS that will contain the SASCP load module. In the command, sas94.instsascp.xmit is the name of the file to which you transferred the instsascp.xmit file using FTP.

   receive indataset(sas94.instsascp.xmit)

   Respond with the name of a data set that will contain the SASCP load module by issuing the following command:

   da(sas94.instsascp.load)

4. Copy the SASCP module to a load library that contains TSO commands. This can be a STEPLIB library defined in a LOGON procedure, a system link list library, or a link pack area library.

   For more information about the SASCP module, see “Implementing SAS TSO Support” in the *Configuration Guide for SAS Foundation for z/OS*. 
Install the SASCP64 Module

On z/OS, you must install the SAS 9.4 SASCP64 module. To install the SAS 9.4 SASCP64 module, follow these steps:

1. Download the instsascp64.xmit file from the SAS FTP website at ftp://ftp.sas.com/techsup/zOS/SASINST.

2. Using FTP, transfer the instsascp64.xmit file (in binary mode) to your z/OS system. You should preallocate the target data set with the following DCB characteristics:
   - LRECL=80
   - BLKSIZE=3120
   - RECFM=FB

3. Submit a RECEIVE command to create a PDS that will contain the SASCP load module. In the command, sas94.instsascp64.xmit is the name of the file to which you transferred the instsascp.xmit file using FTP.
   ```
   receive indataset(sas94.instsascp64.xmit)
   ```
   Respond with the name of a data set that will contain the SASCP64 load module by issuing the following command:
   ```
   da(sas94.instsascp64.load)
   ```

4. Copy the SASCP64 module to a load library that contains TSO commands. This can be a STEPLIB library defined in a LOGON procedure, a system link list library, or a link pack area library.

   For more information about the SASCP64 module, see “Implementing SAS TSO Support” in the Configuration Guide for SAS Foundation for z/OS.

---

Designating Ports and Multicast Addresses

About Ports and Multicast Addresses

While you are creating operating system user accounts and groups, you need to review the ports that the SAS servers, third-party servers, and spawners in your system use by default. If any of these ports is unavailable, select an alternate port, and record the new port in a pre-installation checklist:

- “Pre-installation Checklist for Ports for SAS” on page 24
- “Pre-installation Checklists for Third-Party Products” on page 67

You need to plan for designating Internet Protocol (IP) multicast addresses for all machines in your SAS deployment. Multicasting simplifies the ongoing management and deployment of SAS web applications by providing the flexibility to customize the SAS middle tier and to distribute SAS web components to implement load balancing.
Multicast Address Considerations

By default, multicasting is not used in the typical SAS deployment and SAS Remote Services is turned off. If you created a custom application that uses SAS Remote Services, you can use multicasting and enable SAS Remote Services.

The SAS Deployment Wizard prompts you to supply a multicast address for intermachine communication. The wizard provides you with a default multicast address that it generates based on the machine’s IP address and the Admin-Local scope that is recommended in RFC 3171 (IPv4) or RFC 4291 (IPv6).

A multicast group communication protocol is used to communicate among middle-tier SAS applications in a single SAS deployment (the SAS applications connected to the same SAS Metadata Server). The combination of multicast IP address and multicast UDP port should be different for each SAS deployment and different from combinations used by other multicast applications at your site.

The IP multicast address must be valid for IP multicasting. It should be in the range 224.0.0.0 to 239.255.255.255 for IPv4 or have the prefix ff00::/8 for IPv6. Typically, the chosen IP multicast address is in the Admin-Local scope block, which corresponds to 239/8 for IPv4 and ff14::/8 for IPv6. The sample address provided by the SAS Deployment Wizard during configuration conforms to these standards. The address should be unique to SAS applications for the subnet that they are installed on.

The IP multicast UDP port should be open and usable on any machine on which a middle-tier application is to be installed. It should not conflict with any previous TCP port definitions such as the SAS Metadata Server. The multicast group communication is intended to be used only within your data center environment. Many sites keep their data center network separated from users via a firewall that automatically isolates the multicast protocol. Alternatively, the time to live (TTL) parameter can be used to restrict the scope of multicast communication. Your network administrator can suggest a TTL setting to limit the scope of multicast. The TTL parameter and the authentication token option both have security implications.

The multicast TTL parameter (default = 1, range = 0–255) affects the number of network hops a multicast packet can take before being dropped. The TTL value must be greater than or equal to the highest number of hops between any two servers containing SAS products. In addition, some network router documentation recommends that multicast datagrams with initial TTL=0 are restricted to the same host, multicast datagrams with initial TTL=1 are restricted to the same subnet, and multicast datagrams with initial TTL=32 are restricted to the same site. Consult your network router documentation or your network administrator to determine the correct values for your environment.

Note: Make sure that all of the machines in your SAS 9.4 deployment are members of the same subnet or be sure to set the default TTL value to a number higher than 1. The SAS Deployment Wizard lets you set the TTL value during SAS 9.4 deployment. For information about how to change this parameter after deployment, see “Administer Multicast Options” in SAS Intelligence Platform: Middle-Tier Administration Guide.

Because the multicast protocol conveys credentials, it is protected via encryption. By default, the multicast group communication is protected only with a fixed encryption key that is built into the software. If your middle tier is running in an environment that is not well-isolated from user access, then you might want better protection against eavesdroppers and unauthorized group participants. In this case, choose an authentication token known only to your SAS middle-tier administrative users. The authentication token is a password-like string needed to connect to the multicast group and create a site-specific encryption key.
The SAS Deployment Wizard default simplifies configuration by using the authentication token that is built into the software. This option is best used in development and other low-security environments. It might be appropriate in higher-security environments where the multicast group communication is isolated from the user community (either via a firewall or the TTL parameter) and where all data center administrative users and operational users have sufficient security approval.

If your multicast group communication is not within a well-isolated data center environment or if the security procedures at your site require protection for administrative users and operational users in various roles, you should specify an authentication token that is known only to the administrators of the SAS environment. The same token must be supplied on each tier in the configuration.

By default, there is a code-level authentication token shared between all SAS middle-tier applications to prevent access to the multicast group from unauthorized listeners. If you choose to use a customized authentication token, use the SAS Deployment Wizard to enter an authentication token value that meets your organization's security guidelines. In a multi-tier configuration, a prompt appears on each tier that has an application participating in the SAS multicast group. You must provide the same authentication token to each tier in the same SAS deployment (that is, each tier associated with the same SAS Metadata Server).

### Pre-installation Checklist for Ports for SAS

The following checklist indicates what ports are used for SAS by default. Record information about them in this checklist.

SAS servers and their clients dynamically allocate ports in the ephemeral ports range. These are temporary ports allocated by the operating system's IP stack. The operating system assigns ephemeral ports from a designated port range. By default, the range is 32768 to 65535 on Linux, Solaris, and AIX. On Windows and HP-UX, it is 49152 to 65535. These ranges are generally tunable by a system administrator. Consult your operating system administration documentation for details about tuning your system. An ephemeral port becomes available for reuse when the connection terminates.

*Note:* The SAS Deployment Wizard prompts you for this information. You cannot complete the installation without it.

On z/OS, the SAS servers are configured and initially started as TSO processes invoked from the USS shell using `/bin/tso`. When these servers are started under TSO, the job name is the user ID that is starting the server with a character appended to the end. If your site uses the reserved ports facility in TCP/IP, each port definition should include the started task and the Installer ID job name as valid users of this port. You can use an asterisk (such as, `sas*`) in this definition. You can use a TCP service name instead of a hardcoded port. For more information about how to reserve the TCP port for a particular SAS server, refer to your operating system documentation.

On all operating systems, for the SAS server tier, the last digit of the default port number reflects the configuration level that you select in the SAS Deployment Wizard. For example, when you select `Lev1`, the default port for the SAS Metadata Server is 8561. If you select another level, such as `Lev2`, the wizard changes the default port to 8562.

*Note:* More complete and up-to-date checklists are available at [http://support.sas.com/installcenter/plans](http://support.sas.com/installcenter/plans). If you are a SAS solutions customer, consult the pre-installation checklist provided by your SAS representative for a complete list of ports that you must designate.
Table 3.14  Pre-installation Checklist for Ports for SAS

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</tbody>
</table>

* The range of ephemeral ports available for unicast UDP messaging and for TCP failure detection is in the peer-to-peer distributed system. These ephemeral ports are created from available ports in a system.

** SAS Cloud Analytic Services (CAS) is installed with SAS Viya.

*** If set to zero, the operating system selects an available port. Each process on a machine must have its own TCP port. Note that some operating systems restrict the range of ports usable by non-privileged users and that using restricted port numbers can cause run-time errors in GemFire start-up.
Chapter 4

Creating a SAS Software Depot

Deployment Process Overview: Step Three

One prerequisite for deploying SAS is to create a special file system of SAS product and order data—a SAS Software Depot—that the SAS Deployment Wizard then uses to install and configure SAS.

1. Plan and review additional documentation.
2. Create users and groups and designate ports.

3. Create a SAS Software Depot.
4. Install required third-party software.
5. Install and configure SAS.
About SAS Software Depots

A SAS Software Depot is a file system that has SAS installation files that represent one or more orders. The depot is organized in a specific format that is meaningful to the SAS Deployment Wizard, which is the tool that installs and initially configures SAS. The depot contains the SAS Deployment Wizard executable, one or more deployment plans, a SAS installation data file per order, order data, and product data.

Figure 4.1  SAS Software Depot File Structure

Before you can install SAS, you must have a SAS Software Depot to install from. During a SAS software download, the SAS Download Manager downloads your order, verifies it, and automatically creates a SAS Software Depot. If you receive your SAS Software Order in the form of physical media, then you must create a depot using the SAS Deployment Wizard.
Benefits of a SAS Software Depot

The main advantage of a SAS Software Depot is realized when it resides on the network at a location that you can share access to. When it is shared, a depot provides a faster and more reliable means of installation compared to traditional removable media (cartridges, CDs, DVDs, and so on).
If you have remote sites running SAS without access to the network on which your depot resides, you can use the SAS Deployment Wizard to create your own SAS media image to write to the removable media of your choice.

Here are some other benefits of using a SAS Software Depot:

- It centralizes SAS orders.
  
The depot enables you to place multiple SAS orders in one location to simplify initial SAS deployment and future maintenance.

- It makes applying maintenance and upgrades easier.
  
  You need to download only the changed depot files instead of having to download an entire SAS order.

- It saves disk space.
  
  Storing multiple SAS orders in a single depot saves disk space because any content shared between SAS orders is not duplicated, it is shared.

  A single depot in SAS 9.4 can store SAS installation data files for more than one operating system, making the single, multi-system SAS 9.4 depot cumulatively smaller than the multiple, single-system depots in older versions of SAS.

- It saves download time.
  
  Because there is a shared copy of common files, the single, multi-system depot requires smaller amounts to download.

- It organizes license keys (also known as SAS installation data files).
  
  The depot enables you to place SAS installation data files in a standard location to better associate license keys with their corresponding SAS orders. (These SAS installation data files are stored in the `sid_files` directory, directly under the depot’s root.)

- It identifies multiple SAS orders.
The depot supports the SAS Deployment Wizard’s feature that enables you to customize order descriptions and enter notes to better identify multiple SAS orders residing in a single depot.

Because depots contain your personal SAS order, it is important to use best practices for securing and backing up your depot.

---

**Best Practices for SAS Software Depots**

For customers who download SAS, their SAS Software Depot is the only copy of their SAS order. The depot contains the files from which SAS is initially installed. For this reason, it is important to use these best practices when managing your depot:

- **Keep your depot.**
  
  When you keep your SAS 9.4 depot, applying maintenance and upgrades becomes easier because you have to download only the changed depot files instead of downloading an entire SAS order.

- **Locate the depot in an empty directory.**
  
  Create or download your depot into an empty directory that will not be the future location of the SAS installation directory (SASHome directory).

- **Perform routine backups.**
  
  As with your SAS production system, it is important to routinely back up your depot and to verify the integrity of these backups.

  *Note:* Another important reason for securing and backing up your depot is that there are limits on the number of times that you can download your SAS order.

- **Secure the depot location.**
  
  Problems such as data loss, virus infection, and file corruption can compromise your investment in SAS. It is imperative that you have a comprehensive security policy in place to protect your depot.

- **Store SAS installation data files with your depot.**
  
  The SAS installation data file for your order contains information that is integral to successfully deploying SAS. As you get renewal installation data files from SAS—such as the file that contains your permanent SAS license key—it is important that you store them with your depot in the `sid_files` directory.

  **CAUTION:**
  
  Be careful to use the correct SAS installation data file that contains the SAS products that you are planning to install. Using an incorrect file can cause failure when installing SAS add-on products or can cause errors later when attempting to run SAS.

- **Create a SAS Software Depot administrator.**
  
  Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order details require depot Write privileges. Separating depot administration from routine depot usage is a best practice that further protects your depot.
Creating SAS Software Depots

Overview of Creating SAS Software Depots

There are two ways that you can create a SAS Software Depot.

- Download SAS software.
  When you download a SAS order, the SAS Download Manager automatically creates a SAS Software Depot on your system.
- Run the SAS Deployment Wizard.
  Creating a SAS Software Depot is an option on one of the wizard pages.

Prerequisites for Creating a SAS Software Depot

Before you start creating a SAS Software Depot, make sure that you have met the prerequisites.

- Choose a machine that has the following features:
  - Internet access
    If you are downloading your SAS order, you need a machine that can access the SAS download website. Ideally, this machine should be networked so that you can perform deployments directly from the machine without having to physically relocate the depot to another machine.
  - Java SDK for z/OS installed (z/OS only)
    For more information, go to http://support.sas.com/resources/thirdpartysupport/v94/jdks.html.
  - Windowing system
    If you want to run the SAS Download Manager and the SAS Deployment Wizard using a traditional graphical user interface (GUI), then on a UNIX or a z/OS system, make sure that a windowing system such as the Common Desktop Environment (CDE) or X11 is installed.
    To run the deployment wizard on an operating system that does not have a windowing system, see the SAS Deployment Wizard and SAS Deployment Manager: User’s Guide.
  - certain Linux packages and libraries
    - The SAS Download Manager on some 64-bit distributions of Linux might require the compat-libstdc++ RPM resource.
    - The SAS Download Manager on Red Hat Enterprise Linux 5 or later requires both the 32-bit and 64-bit versions of the libXp.so library to be installed.

For more information, see the SAS Download Manager readme file.
Create a SAS Software Depot Using the SAS Download Manager

You must either manually or automatically create a SAS Software Depot using the SAS Download Manager. Perform one of these steps:

1. Download a SAS order. The SAS Download Manager automatically creates a depot.
2. Download the SAS Download Manager from Downloads & Hot Fixes. Create a depot using the SAS Download Manager.

For z/OS, see Installation Instructions for SAS Electronic Software Delivery for Planned Installations on z/OS.

Although these steps flow one after the other, at the end of each step, you can stop and resume the process later.

Follow these steps to download a SAS order and automatically create a depot using the SAS Download Manager:

1. Locate your software order email (SOE) sent by SAS. In this email, perform the step to download the SAS Download Manager.

   Note: It is very important that you locate your original SOE to get the correct order number and SAS installation key to download the software. You cannot use the renewal order number because it is a license update. If you cannot locate your original (SOE), contact Licensing Support or SAS License Assistance at the following URLs:
   - http://support.sas.com/adminservices/contact.html
   - http://support.sas.com/techsup/license

2. Make sure that you have reviewed the prerequisites in “Prerequisites for Creating a SAS Software Depot” on page 36.

3. Log on to the machine as a SAS Software Depot administrator or a user with depot Read, Write, and Execute privileges.

   Note: Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order
details require depot Write privileges. Windows Vista and later requires that you run SAS Download Manager using administrator privileges.

4. Launch a web browser and navigate to the URL specified in your SOE.
5. Select the option that enables you to save the file to disk.
6. Save the SAS Download Manager to a path accessible to the machine.
   Click **Run** to launch SAS Download Manager.
7. Select the language in which the SAS Download Manager displays messages and prompts.
8. At some sites, you might see a page that prompts for proxy information. If so, provide proxy server settings for the SAS Download Manager to access the internet. If needed, contact your site's system administrator for help with these settings.
9. When prompted, enter your order number and SAS installation key.
10. Verify the list of SAS products in your order.

You should add a description for your SAS order (for example, “TS1M3, Rev. 940_15w29”) to distinguish it from other SAS orders. The SAS Deployment Wizard displays this order information during the SAS installation.

![SAS Download Manager](image)

**Note:** Anytime after the download, you can run the SAS Deployment Wizard to add or modify SAS order information. For more information, see “Change Order Information” on page 55.

11. When you are finished adding order information, click **Next**.
12. Select **Include complete order contents** if you do not want to subset your order.
   SAS Download Manager includes all the software in the order. For more information, see “Subsetting SAS Software Orders” on page 48.
13. Specify a depot location and whether you want to remove duplicate files. The depot location is where you want to download SAS and build the depot. This directory should be empty of any content. The exception is if this directory also contains other depots for the same SAS major release as this order. For more information, see “Prerequisites for Creating a SAS Software Depot” on page 36.
CAUTION:
Make sure that your SAS Software Depot directory is not nested within another depot directory (for example, C:\Depot1\Depot2). Launching your SAS installation from a depot that resides within another depot causes your installation to fail.

Select Remove duplicate files and save space. The SAS Download Manager evaluates and optimizes your depot after downloading your order. This optimization is performed on the entire depot including the latest download. Therefore, all software in the depot—not just the software being downloaded—is optimized.

Note: The SAS Deployment Wizard cannot create media from a SAS Software Depot that has been optimized. However, depots that have been optimized can be copied with the SAS Software Depot Copy Utility.

Depots that have been optimized can be added to later, and optimization can be performed on depots to which orders have been added. Optimization can also be performed on depots that have been optimized in the past.

Click Next.

14. If the directory that you specify does not exist, the wizard prompts you. If you want it to create the directory for you, click Yes.

15. At this point, the SAS Download Manager has finished collecting order input. You have one last opportunity to change any information before downloading the SAS order and writing files to the target directory.

Make one of the following choices:
• Click Download to begin downloading the SAS order and writing files to the target directory.
• Click Back to navigate to earlier pages to change order information previously entered.
• Click Cancel to terminate the SAS Download Manager session. Note that you will lose any order information previously entered.
Note: SAS tracks downloads. It counts only a completed download toward your download limit.

Note: The Disk space required value that is displayed on the Final Review page will actually be smaller if you selected Remove duplicate files and save space on the Specify SAS Software Depot Options page. For more information, see Step 13 on page 38.

The SAS Download Manager begins downloading, uncompressing, and creating a SAS Software Depot for your SAS order.

When you see a page similar to the following with the progress indicator at 100%, the SAS Download Manager is finished. Click Next to go to the final page, which describes post-download instructions.
16. Click **Finish** to close the SAS Download Manager.

17. To continue with the installation, proceed to Chapter 5, “Installing Required Third-Party Software,” on page 65.

After you finish your SAS 9.4 deployment, be sure to keep your SAS Software Depot because it makes applying maintenance and future upgrades easier.

### Create a Depot Using the SAS Deployment Wizard

You can use the SAS Deployment Wizard to create a copy of your SAS Software Depot in another directory. If the new depot location is a remote directory on another machine, the directory must be on a shared network drive accessible from the machine running the wizard.

To create a depot on a machine that does not have shared network storage, you must use another mechanism such as SFTP or SCP to copy the depot. (For more information about these mechanisms, see your operating system documentation.)

To create a SAS Software Depot using the SAS Deployment Wizard, follow these steps:

1. Make sure that you have reviewed the prerequisites in “Prerequisites for Creating a SAS Software Depot” on page 36.

2. Log on to the machine as a SAS Software Depot administrator or a user with depot Read, Write, and Execute privileges.

   **Note:** Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order details require depot Write privileges. Windows Vista and later requires that you run SAS Download Manager using administrator privileges.

3. Start the SAS Deployment Wizard using one of two methods:
   - If you are starting the wizard from physical media, proceed as follows depending on your operating system:
• Windows:
The setup.exe program starts automatically when the media is inserted into the drive.

Note: If the SAS Deployment Wizard does not start automatically, open Windows Explorer, navigate to the media’s root directory, and double-click setup.exe.

• UNIX:
Navigate to the media's root directory, and enter ./setup.sh at a command prompt.

• z/OS:
Navigate to the media's root directory, and enter ./setup.rexx at a command prompt.

• If you are starting the wizard from an existing SAS Software Depot, proceed as follows depending on your operating system:
Navigate to the depot’s root directory, and do one of the following:

• Windows:
Double-click setup.exe.

• UNIX:
Enter ./setup.sh at a command prompt.

• z/OS:
Enter ./setup.rexx at a command prompt.

4. Select the language in which the SAS Deployment Wizard displays messages and prompts.

5. Select Create or Add to a SAS Software Depot. Do not select Install SAS software.
6. Verify the list of SAS products in your order.
   You should update the description for your SAS order to distinguish it from other SAS orders. The SAS Deployment Wizard displays order information during the SAS installation.

   ![SAS Deployment Wizard](image)

   **Note:** At any time after the download, you can rerun the SAS Deployment Wizard to add or modify SAS order information. For more information, see “Change Order Information” on page 55.

7. If you have multiple orders in your depot, you must select the order in which you want to create a depot. (Creating unique order descriptions helps you select the correct order.)

8. When you are finished adding order information, click **Next**.

9. Select **Include complete order contents** if you do not want to subset your order. This selection causes the SAS Deployment Wizard to include all software in the order. For more information, see “Subsetting SAS Software Orders” on page 48.
10. Specify a location where you want to download SAS and build the depot. (This location can be shared storage that physically resides on another machine.)

This directory should be empty of any content. The exception is if this directory also contains other depots for the same SAS major release as this order.

**CAUTION:**

Make sure that your SAS Software Depot directory is not nested within another depot directory (for example, C:\Depot1\Depot2). Launching your SAS installation from a depot that resides within another depot causes your installation to fail.

For more information, see “Prerequisites for Creating a SAS Software Depot” on page 36.
11. If the directory that you specify does not exist, the wizard prompts you. If you want it to create the directory for you, click **Yes**.

12. At this point, the SAS Deployment Wizard has finished collecting order input. You have one last opportunity to change any information before downloading the SAS order and writing files to the target directory.

Make one of the following choices:

- Click **Start** to begin downloading the SAS order and writing files to the target directory.
- Click **Back** to navigate to earlier pages to change order information previously entered.
- Click **Cancel** to terminate the SAS Deployment Wizard session. Note that you will lose any order information previously entered.
13. If you are running the SAS Deployment Wizard from physical media, the SAS Deployment Wizard prompts you for media. Continue to provide media as prompted.

*Note:* If you are working on a UNIX system without an automounter, mount the device. For information about the privileges required to mount a device and the syntax of the `mount` command for your system, see the [SAS Deployment Wizard and SAS Deployment Manager: User's Guide](#).

The SAS Deployment Wizard begins creating a SAS Software Depot for your SAS order.

14. When you see a page similar to the following with the progress indicator at 100%, the SAS Deployment Wizard is finished. Click **Next** to go to the final page, which describes post-download instructions.
15. Click the `depotsummary.html` link to review the QuickStart Guide.

16. Click **Finish** to close the SAS Deployment Wizard.

17. If you are using physical media on a UNIX system with an automounter, use the `eject` command to remove the media. On a UNIX system without an automounter, you must unmount the device using the `umount` command, and then manually open the drive. For information about the `umount` command to unmount a device on your system, see the **SAS Deployment Wizard and SAS Deployment Manager: User's Guide**.

18. To continue with the installation, proceed to Chapter 5, “Installing Required Third-Party Software,” on page 65.
After you finish your SAS 9.4 deployment, be sure to keep your SAS Software Depot because it makes applying maintenance and future upgrades easier.

## Subsetting SAS Software Orders

### Overview of Subsetting SAS Software Orders

The SAS Deployment Wizard enables you to break up—or subset—your SAS software order. Subsetting your order makes it easier to provision individual SAS clients and conserves download time and disk space.

When you subset your depot, you are creating a copy of your original depot with only those products that you designate.

![Specify Subset Options Page](image)

The SAS Deployment Wizard enables you to create a list of the contents of your subbedorder. For more information, see “List Contents of Subsetted Orders” on page 53.

### Subset an Order

The SAS Deployment Wizard enables you to subset your SAS order based on operating system, product type, and language.

*Note:* Because of its large size, the *utilities* subdirectory is *not* included in a subsetted depot.
To subset an order, follow these steps:

1. Log on to the machine as a SAS Software Depot administrator or a user with depot Read, Write, and Execute privileges.

   Note: Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order details require depot Write privileges. Windows Vista and later requires that you run SAS Download Manager using administrator privileges.

2. Start the SAS Deployment Wizard by navigating to the depot’s root directory, and running one of the following commands, depending on your operating system:
   - Windows: Double-click `setup.exe`.
   - UNIX: Enter `.setup.sh` at a command prompt.
   - z/OS: Enter `.setup.rexx` at a command prompt.

3. Select the language in which the SAS Deployment Wizard displays messages and prompts.

4. Select Create or Add to a SAS Software Depot.

5. If you have multiple orders in your depot, select the order that you want to subset, and then click Next.

6. You should update the description for your SAS order to distinguish it from other SAS orders. The SAS Deployment Wizard displays this order information during the SAS installation.
7. When you are finished adding order information, click **Next**.

8. Select **Subset order contents**, and click **Next**.

9. On the Specify Subset Options page, select one or more of the following options, and click **Next**.
   - Select **By product platform/operating system** to choose SAS products based on the operating systems on which the products will run.
   - Select **By product languages** to choose SAS products by the language in which they will be installed.
   - Select **By products** to choose SAS products by name that you want to include in the SAS Software Depot.
     
     If you select **By products**, the drop-down list is activated, enabling you to further refine the products to subset.
     
     - Select **SAS Foundation products** to include products (and their prerequisites) that are installed only with Base SAS.
     - Select **Client products** to include products that are not SAS Foundation and are intended to be installed on client machines.
     - Select **SAS Foundation and client products** to include both types of products (and their prerequisites). One example is a depot with Base SAS and SAS Enterprise Guide.

     **Note:** If you select **By products**, you cannot deploy the subsetted products using a deployment plan file. Typically, client products do not require a deployment plan file so this restriction should not affect deploying them. If you select **By products**, the SAS Migration Utility is not included in the subsetted depot.
10. (This page appears if you chose **By products** in Step 9.)

Select one or more SAS products to add to your new depot, and click **Next**.

**Note:** The page that appears is based on which type of products you chose: SAS Foundation products, client products, or SAS Foundation and client products. (The page shown here is for SAS Foundation products.)

11. (This page appears if you chose **By product platform/operating system** in Step 9.)

Select operating systems on which the SAS products run to add these products to your new depot, and click **Next**.
12. (This page appears if you chose **By product languages** in Step 9.)

Select languages in which the SAS products are installed to add these products to your new depot, and click **Next**.

13. Specify a location where the deployment wizard creates your depot, and click **Next**.

**CAUTION:**

Make sure that your SAS Software Depot directory is not nested within another depot directory (for example, C:\Depot1\Depot2). Launching your SAS installation from a depot that resides within another depot causes your installation to fail.
14. Review the Final Review page. If you are satisfied, click Start. Otherwise, click Back, and make changes.

15. After the depot has been created, click Finish to close the SAS Deployment Wizard.

**List Contents of Subsetted Orders**

It is helpful to know exactly which SAS products are in an order that has been subsetted. The SAS Deployment Wizard enables you to create a list of the contents of your subsetted order. You generate this list by submitting a command.
Windows

```
setup.exe -listdepot output-pathname
```

UNIX

```
setup.sh -listdepot output-pathname
```

z/OS

```
setup.rexx -listdepot output-pathname
```

For example, a command on Linux might resemble the following:

```
./setup.sh -listdepot /mydata/order_contents.txt
```

The deployment wizard executable resides in your depot’s root directory.

The list resembles the following:

<table>
<thead>
<tr>
<th>Date: 2013 Dec 12 10:02:56</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depot: /nfs/mymachine/vol/vol7/sas_software_depot</td>
</tr>
<tr>
<td>Order: 099SFS</td>
</tr>
<tr>
<td>+ Base SAS [base__94ts1m0__mvs__ne__sp0__1]</td>
</tr>
<tr>
<td>+ Base SAS [base__94ts1m0__mvs_w0__sp0__1]</td>
</tr>
<tr>
<td>+ Base SAS Help and Documentation [basedoc__94110__prt__xx__sp0__1]</td>
</tr>
<tr>
<td>+ Base SAS JAR Files [basejars__94110__prt__xx__sp0__1]</td>
</tr>
</tbody>
</table>

<...>

<table>
<thead>
<tr>
<th>Date: 2013 Dec 12 10:02:56</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depot: /nfs/mymachine/vol/vol7/sas_software_depot</td>
</tr>
<tr>
<td>Order: 099SQ2_2011-12-01-12.27.01</td>
</tr>
<tr>
<td>+ Advanced Analytics Common Components [aacomp__94110__wx6__en__sp0__1]</td>
</tr>
<tr>
<td>+ DATA Step to DS2 Translator [accelmva__94160__wx6__en__sp0__1]</td>
</tr>
<tr>
<td>+ Microsoft Office Access Database Engine 2010 [ace__94112__prt__xx__sp0__1]</td>
</tr>
<tr>
<td>- SAS/GRAPH ActiveX Control [activexgraph__94230__win__de__sp0__1]</td>
</tr>
<tr>
<td>- SAS/GRAPH ActiveX Control [activexgraph__94230__win__en__sp0__1]</td>
</tr>
<tr>
<td>- SAS/GRAPH ActiveX Control [activexgraph__94230__win__es__sp0__1]</td>
</tr>
</tbody>
</table>

The character at the beginning of a line indicates how to interpret the output.

Here are details:

- The line with the order number has **Order:** at the beginning.
- A plus sign (+) indicates that the product is in the order.
- A minus sign (-) indicates that the product is in the depot, but it is not in the specified order.

For more information, see the SAS Deployment Wizard and SAS Deployment Manager: User's Guide.

### Managing SAS Orders

#### Overview of Managing SAS Orders

Using the SAS Deployment Wizard, you can do the following with your SAS order:

- “Change Order Information” on page 55
- “Delete an Order” on page 57
- “Create a Disc Image of Your Order” on page 59
Change Order Information

Being able to identify a SAS order is important, especially when your SAS Software Depot contains multiple orders. To change the information about a SAS order, follow these steps:

1. Log on to the depot machine as a SAS Software Depot administrator or a user with depot Read, Write, and Execute privileges.

   Note: Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order details require depot Write privileges. Windows Vista and later requires that you run SAS Download Manager using administrator privileges.

2. Start the SAS Deployment Wizard. Navigate to the depot's root directory, and do one of the following depending on your operating system:
   - Windows: Double-click setup.exe.
   - UNIX: Enter ./setup.sh at a command prompt.
   - z/OS: Enter ./setup.rexx at a command prompt.

3. Select the language in which the SAS Deployment Wizard displays messages and prompts.

4. Select Manage this SAS Software Depot. Click Next.

5. Select Manage SAS Software Depot. Click Next.
6. Select the order for which you want to change information, and then click Change Details.

7. You can update the description for your SAS order to distinguish it from other SAS orders. You can add notes. The SAS Deployment Wizard displays this order information during the SAS installation.
8. When you are finished, click **OK**.

9. Click **Finish** to close the SAS Deployment Wizard.

### Delete an Order

**CAUTION:**

It is a best practice to always make sure that you have backed up the SAS Software Depot before deleting an order. Keep in mind that there are limits on the number of times that you can download an order from SAS.

To delete a SAS order, follow these steps:

1. Log on to the depot machine as a SAS Software Depot administrator or a user with depot Read, Write, and Execute privileges.

   *Note:* Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order details require depot Write privileges. Windows Vista and later requires that you run SAS Download Manager using administrator privileges.

2. Start the SAS Deployment Wizard. Navigate to the depot’s root directory, and do one of the following depending on your operating system:

   - **Windows:**
     Double-click `setup.exe`.
   - **UNIX:**
     Enter `./setup.sh` at a command prompt.
   - **z/OS:**
     Enter `./setup.rexx` at a command prompt.

3. Select the language in which the SAS Deployment Wizard displays messages and prompts.

4. Select **Manage this SAS Software Depot**. Click **Next**.
5. Select **Manage SAS Software Depot**. Click Next.

6. Select the order that you want to delete, and then click **Delete Order**.
7. Confirm that you want to delete the order by clicking Yes.

The SAS Deployment Wizard begins to delete your order. When all of the order’s files have been deleted, the Manage SAS Software Depot page appears again without the deleted order listed.

8. Select Finish to close the SAS Deployment Wizard.

**Create a Disc Image of Your Order**

If you have SAS running at a remote site that does not have access to the network on which your SAS Software Depot resides, you can use the SAS Deployment Wizard to create a disc image of your order. The process creates folders, subfolders, and files. You can use third-party software such as ImgBurn to create ISO files. You can write the ISO files to the physical media format that you specify (either CD or DVD).

You can create a disc image on a per-order basis only. If your SAS Software Depot has more than one order, then you have to make a disc image of each order.

To create a disc image of your SAS order, follow these steps:

1. Log on to the machine as a SAS Software Depot administrator or a user with depot Read, Write, and Execute privileges.

   **Note:** Consider designating one or more users to serve as SAS Software Depot administrators. Users needing to deploy SAS software or to apply maintenance require depot Read and Execute privileges. Depot administration tasks such as initially creating the depot, storing SAS installation data files, and updating order details require depot Write privileges. Windows Vista and later requires that you run SAS Download Manager using administrator privileges.
2. Start the SAS Deployment Wizard. Navigate to the depot’s root directory, and do one of the following depending on your operating system:
   - Windows:
     Double-click setup.exe.
   - UNIX:
     Enter ./setup.sh at a command prompt.
   - z/OS:
     Enter ./setup.rexx at a command prompt.
3. Select the language in which the SAS Deployment Wizard displays messages and prompts.
4. Select Manage this SAS Software Depot. Click Next.
5. Select Manage SAS Software Depot. Click Next.
6. Select the order for which you want to create a disc image, and then click **Create Media-Ready Image**.

7. Select the type of media (CD or DVD) for which you want to create a disc image of your order. Provide the target directory where you want the SAS Deployment Wizard to write this image. Click **Start**.
The SAS Deployment Wizard begins writing SAS order files to the target directory.

8. When the progress indicator displays 100%, the image is completed. Click **OK**.

9. Click **Finish** to close the SAS Deployment Wizard.

The file system that the SAS Deployment Wizard creates is a disc image of your SAS order that is logically arranged into directories. Each directory contains a summary to enable you to maintain media labels.

10. Using third-party software such as ImgBurn, you can create ISO files from each folder.

**Note:** For more information such as how to use the labels.txt file, see “Creating Media from SAS Software Depots” in the *SAS Deployment Wizard and SAS Deployment Manager User's Guide*.

---

**Checking Your SAS Software Depot**

**Overview of Checking Your SAS Software Depot**

SAS provides a utility that can verify the integrity of your SAS Software Depot. The SAS Software Depot Check Utility scans your depot and assembles a list of the files in the depot. The depot check utility identifies any missing files. For each file that it finds, the depot check utility attempts to validate its size, checksum, and date-and-time stamp. The depot check utility attempts to fix any problems and lists the results of its various validation tests. You have the option of printing the results or viewing them in a web browser.

**Check Your SAS Software Depot**

To run the SAS Software Depot Check Utility, follow these steps:
Note: You should use the same user account with which the SAS Software Depot was created to run the SAS Software Depot Check Utility.

1. In your SAS Software Depot, locate the utilities/depotchecker directory.

2. Depending on your operating system, do one of the following:

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>SASDepotCheck.exe</td>
</tr>
<tr>
<td>UNIX</td>
<td>SASDepotCheck.sh</td>
</tr>
<tr>
<td>z/OS</td>
<td>SASDepotCheck.rexx</td>
</tr>
</tbody>
</table>

3. On the Ready to Execute page, click Run.

   ![Ready to Execute](image)

   The depot check utility initializes.

4. Select the language in which the depot check utility displays text, and click OK.

   A welcome page is displayed.

5. Specify the location of your SAS Software Depot (for example, C:\SAS Software Depot).

The depot check utility begins scanning your depot. The time required to complete the scan depends on the size of your depot.

When the scan is completed, you see a page similar to the following:

7. Select one of the following options, and then click **Finish**:
   - **Save Report** writes the results of the depot check utility scan to a text file.
   - **View in Browser** launches a web browser and displays the results of the depot check utility scan.
   - **Print Report** prints the results of the depot check utility scan.

8. Click **Finish**.
Installing Required Third-Party Software

Deployment Process Overview: Step Four

Installing required third-party software is a part of deploying SAS:

1. Plan and review additional documentation.
2. Create users and groups and designate ports.
3. Create a SAS Software Depot.
4. Install required third-party software.
5. Install and configure SAS.

About Installing Third-Party Products

SAS requires the following third-party products:

- PowerShell (on Windows)
- JUnit
Depending on your choice of a scheduler and your accessibility needs, some SAS deployments require these products:

- Platform Suite for SAS
- Java Access Bridge

*Note:* You must have the necessary third-party software installed on the current machine. If you do not, the SAS Deployment Wizard will not let you complete your SAS deployment.

For more information, see the system requirements for SAS 9.4, available at [http://support.sas.com/resources/sysreq/index.html](http://support.sas.com/resources/sysreq/index.html).

---

### Obtaining Third-Party Software

#### Overview of Obtaining Third-Party Software

SAS provides you with two ways to obtain required third-party software:

- SAS Software Depot: third_party Directory
- SAS Third-Party Software Website

#### SAS Software Depot: third_party Directory

Some third-party products are provided with SAS 9.4. Product installation files and documentation are located in the SAS Software Depot in the `third_party` directory.

*Figure 5.1 The third_party Subdirectory in the SAS Software Depot*

Platform Suite for SAS is an example of a third-party product that might have been provided. To determine whether any third-party software is included with your order, refer to your SAS Software Summary in your SAS Software Depot in the `order_number` directory under `install_doc`. For example:

`C:\SAS Software Depot\install_doc\order_number\ordersummary.html`
Some third-party software can be obtained online from SAS. For more information, see “SAS Third-Party Software Website” on page 67.

**SAS Third-Party Software Website**

SAS maintains a third-party software website to help you do the following tasks:

- determine what version of the product to install
- obtain some products if you do not already have them
- find installation instructions
- learn about any patches required

The SAS third-party website is located at [http://support.sas.com/resources/thirdpartysupport/](http://support.sas.com/resources/thirdpartysupport/).

**About the Java Runtime Environment**

SAS Java applications require the Java Runtime Environment (JRE), which includes a Java Virtual Machine (JVM) that executes the application and standard Java class libraries. On Windows, UNIX, and Linux, the SAS Deployment Wizard installs the default version of the JRE with which SAS has been tested.

On z/OS, you must provide the installation directory to a JRE that you have already installed or install SAS without a JRE.

If a different supported version of the JRE is required, it can be obtained from the appropriate vendor’s website.

**Pre-installation Checklists for Third-Party Products**

**Overview of Pre-installation Checklists for Third-Party Products**

As you install third-party products, print and complete the available and applicable third-party software checklists.

**PowerShell**

Microsoft PowerShell is a task-based command-line shell and scripting language built on .NET. PowerShell is required to deploy the SAS middle tier on Windows. The SAS Deployment Wizard uses PowerShell to run configuration scripts that modify path information. During installation, the deployment wizard prompts you to specify the PowerShell installation location.

Table 5.1  PowerShell

<table>
<thead>
<tr>
<th>Description</th>
<th>Default Values</th>
<th>Actual Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>PowerShell location</td>
<td>\Windows\System32\WindowsPowerShell\v1.0</td>
<td></td>
</tr>
<tr>
<td>Product version</td>
<td>2.2</td>
<td></td>
</tr>
</tbody>
</table>

JUnit

JUnit is an open-source testing framework for Java and the de facto standard for writing unit and regression tests. Some of the validation tests provided with SAS products run under the SAS Deployment Tester framework and require JUnit. During SAS installation, the SAS Deployment Wizard prompts you to specify the location of the JUnit JAR file.

For more information about JUnit version requirements and a download link, go to SAS Support for Other Third-Party Software Products.

Table 5.2  JUnit

<table>
<thead>
<tr>
<th>Description</th>
<th>Default Values</th>
<th>Actual Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>JUnit JAR file location</td>
<td>\Program Files\JUnit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>/usr/local/junit</td>
<td></td>
</tr>
<tr>
<td>Product version</td>
<td>4.8.1</td>
<td></td>
</tr>
</tbody>
</table>

Java Access Bridge

The Java Access Bridge is a prerequisite for JAWS, the Windows accessibility solution. The Java Access Bridge is shipped with SAS 9.4. For more information, see SAS Support for Other Third-Party Software Products.

Platform Suite for SAS

If you plan to use products from Platform Computing for scheduling or for grid computing, you must install products from the Platform Suite for SAS offering. Platform Suite for SAS includes three products:

- Platform Process Manager
  
  provides scheduling capabilities. Platform Process Manager submits jobs to Platform LSF and manages dependencies between jobs. (When you install Platform Process Manager, Platform LSF is also installed.)

- Platform LSF (Load Sharing Facility)
  
  manages resource requirements and provides for load balancing.

- Platform Grid Management Service
includes a monitoring daemon that enables administrators to monitor the load on machines running Platform LSF.

If you are using Platform Suite for SAS for grid computing, you must install Platform LSF and Platform Grid Management Service. If you want to schedule jobs to run on the grid, you must also install Platform Process Manager.

For more information about where to install each of these products, see “SAS Grid Topology” in Grid Computing in SAS.

Platform Suite for SAS is distributed with SAS in the depot `third_party` directory.

You can also find Platform Suite for SAS documentation in the Scalability & Performance focus area at http://support.sas.com/rnd/scalability/platform/index.html.

Table 5.3  Platform Suite for SAS

<table>
<thead>
<tr>
<th>Description</th>
<th>Default Values</th>
<th>Actual Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platform Process Manager Port</td>
<td>1966 (inbound)</td>
<td></td>
</tr>
<tr>
<td>Product Version</td>
<td>8.1</td>
<td></td>
</tr>
<tr>
<td>Platform LSF Ports</td>
<td>6878, 6881, 6882, 7869, 7870, 7871, 7872 (inbound)</td>
<td></td>
</tr>
<tr>
<td>Product Version</td>
<td>7.06</td>
<td></td>
</tr>
<tr>
<td>Platform Grid Management Service Port</td>
<td>1976 (inbound)</td>
<td></td>
</tr>
<tr>
<td>Product Version</td>
<td>7.11</td>
<td></td>
</tr>
</tbody>
</table>
Deployment Process Overview: Step Five

This chapter describes how to use the SAS Deployment Wizard to install and configure all of the SAS software components in your deployment plan on each host in your environment.

1. Plan and review additional documentation.
2. Create users and groups and designate ports.
3. Create a SAS Software Depot.
4. Install required third-party software.
5. Install and configure SAS.

Preparing to Install and to Configure

Overview of Preparing to Install and to Configure

This section includes important information about the SAS Deployment Wizard, deployment plans, installation options and considerations, validation, and testing.

SAS Deployment Wizard Options

The SAS Deployment Wizard is a cross-platform utility that installs and configures many SAS products. Using a SAS installation data file and a deployment plan file (plan.xml) for its initial input, the deployment wizard prompts the user for all remaining input at the start of the session so that the user does not have to monitor an entire deployment.

There are two major ways that you can run the SAS Deployment Wizard.

- **interactively**
  
  This is the standard way of providing input via fields on a deployment wizard page with a Back and Next button. You choose from three levels of prompting: Express (minimum set of prompts), Typical (basic set of prompts), and Custom (all prompts).

- **non-interactively**
  
  This includes a record and playback feature that enables you to automate a SAS installation for use on multiple machines. This feature is designed for large-scale enterprise deployments to prevent users from having to manually provide input on every page each time the SAS Deployment Wizard is run on a machine. For more information, see “Automating the SAS Installation on Multiple Machines” on page 122.

About Deployment Plans

A deployment plan instructs the SAS Deployment Wizard what software to install and configure on each machine in a SAS deployment. A deployment plan is an XML file that is used as input to the SAS Deployment Wizard.
There are two types of deployment plans: standard and custom. A standard deployment plan describes a common configuration. Standard deployment plans are provided in the SAS Deployment Wizard. A custom deployment plan is created by you and your SAS representative specifically for your site.

- If you have a custom deployment plan, an XML file (or a ZIP file containing an XML file) was emailed to you.
- If you have a standard deployment plan, you just need the name of the plan. During the installation, the standard deployment plan is available from a drop-down list on a page in the SAS Deployment Wizard.
- Your deployment plan must be a valid SAS 9.4 plan. The SAS Deployment Wizard does not accept plans from earlier SAS releases.

At the end of the SAS deployment, the SAS Deployment Wizard makes a copy of the deployment plan that it used. The deployment plan can be helpful when you want to add another SAS product or change your SAS configuration. The deployment wizard stores a copy of the deployment plan in the SAS configuration directory in the utilities subdirectory. It inserts a date and time stamp to the deployment plan filename. For example:

\[C:\SAS\Config\Lev1\Utilities\plan.2014-06-17-11.04.xml\]

To download the latest SAS 9.4 standard deployment plans that also contain a corresponding architectural diagram and pre-installation checklist, go to [http://support.sas.com/installcenter/plans](http://support.sas.com/installcenter/plans).

**Reducing the Number of Password Prompts**

In SAS 9.4M3, the SAS Deployment Wizard enables you to reduce the number of password prompts for the required, SAS internal, metadata-based server accounts and SAS Web Infrastructure Platform Data Server accounts.

When you select the **Set passwords using the Unrestricted Administrator password** check box, the SAS Deployment Wizard reuses the password for the following accounts:
• SAS Internal Account: Trusted User (sastrust@saspw)
• SAS Internal Account: Anonymous Web User (webanon@saspw)
• SAS Web Infrastructure Platform Data Server (dbmsowner)

Note: There are password restrictions for SAS Web Infrastructure Platform Data Server. Make sure that your password meets the criteria described in “SAS Web Infrastructure Platform Data Server” in SAS Intelligence Platform: Middle-Tier Administration Guide.

• SAS Environment Manager: Administration Database Configuration (adminowner)
• SAS Internal Account: SAS Environment Manager Service Account (sasevs@saspw)
• SAS Environment Manager: Database Configuration (EVManger)
• SAS Environment Manager Enablement Kit Database Credentials User (sasevdb)
• SAS Visual Analytics Services Database User (vatadm)

When you select the Express prompting level for the SAS Deployment Wizard, you are not prompted for the required, SAS internal, metadata-based server accounts and SAS Web Infrastructure Platform Data Server accounts. When you select the Typical or Custom prompting levels, you do see password prompts for these accounts. However, their password fields are pre-populated with the SAS Internal Account: Unrestricted Administrator password.

Re-entry Feature of the Deployment Wizard

In SAS 9.4M3, a re-entry feature was added to the SAS Deployment Wizard.

If the SAS Deployment Wizard is interrupted during the installation phase, when the wizard is restarted, it installs only those SAS products that it has not already installed successfully.

The SAS Deployment Wizard works in a similar way if it is interrupted during the configuration phase. However, the wizard does not retry any skipped configuration steps (in other words, configuration steps that failed and then the user intentionally directed the wizard to skip them and continue).

In the past, if the SAS Deployment Wizard was interrupted, it would attempt to install and configure all of the products in a SAS order when it was restarted. (The wizard behaved in this manner because it kept no record of which products had errors during installation or configuration or of the point in the installation or configuration at which the user terminated the wizard.)

Note: When you restart the SAS Deployment Wizard in re-entry mode, the wizard assumes that you want to deploy SAS. Therefore, the wizard ignores any non-deployment arguments that you might have previously provided, such as -RECORD.

Installing SAS on z/OS

Installing the SAS Intelligence Platform on z/OS consists of two major steps.

1. Run the SAS Deployment Wizard to first install the SAS Metadata Server as a 64-bit application.

For more information, see the table Start-Up Commands for the SAS Deployment Wizard on page 92.
2. Run the SAS Deployment Wizard a second time to install the remainder of your SAS 9.4 order as a 31-bit application.

*Note:* If you are updating a deployment that runs on z/OS, you must update the deployment in the same order in which you installed SAS in the initial deployment. Before you can start the SAS Deployment Wizard, the cell where you are going to perform the update must be running.

For more information about installing on z/OS, see [http://support.sas.com/documentation/installcenter/94/mvs/index.html](http://support.sas.com/documentation/installcenter/94/mvs/index.html).

The deployment wizard can be run on operating systems that do not have windowing systems. For more information, see the SAS Deployment Wizard and SAS Deployment Manager User’s Guide.

**SAS Visual Analytics Administration and Reporting**

Starting in October 2014 (SAS 9.4, Rev. 940_14w41), SAS provides SAS Visual Analytics Administration and Reporting with most SAS software orders.

SAS Visual Analytics Administration and Reporting is a component included in many SAS 9.4 solutions and technology packages to provide enhanced reporting and printing capabilities. Administration and reporting is supported on Linux and Windows machines only. If your site has a hardware constraint, you might be able to delay your deployment of administration and reporting until later. However, SAS Visual Analytics Apps is operable until you have deployed administration and reporting. For more information, refer to your SAS solutions documentation.

For more information, contact SAS Technical Support.

**SAS Deployment Agents**

The SAS Deployment Agent and its remote clients are required for deployments that run remote processes. SAS uses the SAS Deployment Agent to copy content and to perform configuration management operations associated with creating new servers and clustering. It is also used for server administration tasks such as deployment backups.

**Update Your SAS Documentation Only**

Starting in SAS 9.4M2, for products already installed, the SAS Deployment Wizard enables you to install only the newly released documentation. The wizard skips all SAS product maintenance updates that have occurred since your original order and installs updates to your SAS product documentation only.

*Note:* This documentation-only installation feature is available for certain SAS products such as SAS Studio.

If you receive a SAS order that contains later versions of the SAS products that you are currently running, follow these steps to update your SAS product documentation only:

1. Log on to the machine on which you want to update your SAS documentation with a user ID that meets the requirements for the appropriate operating system.
   - Windows:
     - Use an account that is a member of the Administrators group.
   - UNIX:
Use the same account on all machines on which you are deploying SAS. Do not use root.

2. Start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the command appropriate for your operating system.

**Table 6.1 Start-Up Commands for the SAS Deployment Wizard**

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>setup.exe -docupdate</td>
</tr>
<tr>
<td>UNIX</td>
<td>setup.sh -docupdate</td>
</tr>
</tbody>
</table>

You should see a welcome page.

3. Follow the wizard prompts. For more information, click **Help**.

When you see a page similar to the following, the SAS Deployment Wizard is finished.

The deployment wizard has installed the latest SAS product documentation on your machine.

4. Click **Finish** to close the deployment wizard.

5. Rebuild and redeploy your SAS web applications using the SAS Deployment Manager. For more information, see “Administer SAS Web Applications” in *SAS Intelligence Platform: Middle-Tier Administration Guide*. 
**Metadata Server Clustering**

A metadata server cluster is a group of three or more host machines (nodes) that have been configured as identical metadata servers. Each node runs its own server process, and has its own server configuration information, journal file, and copy of the repository data sets. In addition, each node maintains a complete in-memory copy of the SAS Metadata Repository. The nodes work together as if they were a single metadata server.

*Note:* If you are configuring metadata server clustering, and if your server tier or middle tier includes one or more Windows hosts, then the SAS Deployment Wizard should prompt you for the SAS Deployment Backup and Recovery Tool: User Account. This external account, also referred to as the backup user, is used to run the SAS Deployment Backup and Recovery Tool. The account must meet the requirements that are specified in “What Is a Backup User?” in *SAS Intelligence Platform: System Administration Guide*. If this prompt does not appear, then you must configure the user manually after the deployment is completed. For instructions, see “Specifying a Backup User Manually” in *SAS Intelligence Platform: System Administration Guide*.

Clustering provides redundancy and high availability of the SAS Metadata Server. Client applications and users interact with the cluster in the same way that they would interact with a SAS Metadata Server that is not clustered. A load-balancing process automatically distributes work among the nodes. If a node ceases to operate, the metadata server continues to be available using the remaining nodes.

Clustering is currently supported on Windows and UNIX machines, and starting in SAS 9.4M2, on z/OS.

On Windows, you need an external, Windows domain-based user account that will start all of the nodes. The suggested user ID for this service login is `myWindowsDomain\sassvlgn`. On UNIX and z/OS, the nodes are started by the Installer account. For more information, see “Prerequisites for Cluster Configuration” in *SAS Intelligence Platform: System Administration Guide*.

All of the nodes in the metadata server cluster must be on the same operating system.

You deploy your metadata server cluster by installing an initial SAS Metadata Server, and then moving to another machine and running the SAS Deployment Wizard to deploy a metadata server node. You indicate which type of metadata server you want to deploy by choosing the appropriate step on the deployment wizard’s Select Deployment Step and Products to Install page.
**SAS Web Application Server Clustering**

Server clustering provides availability and enhances performance. In SAS 9.4, enhancements have been made to the deployment model to better support clustering of SAS Web Application Servers. You can easily configure vertical cluster members (additional server instances on the same machine) and horizontal cluster members (install and configure servers on additional machines). Combining vertical and horizontal clustering is supported and can be easily configured.

*Note:* You cannot start a configuration or software update to a middle-tier cluster node until the primary middle-tier configuration has completed.

For more information, see *SAS Intelligence Platform: Middle-Tier Administration Guide*.

**Installation Order Rules for Multiple Machine Deployments**

Be aware that if you are deploying SAS on a multiple-machine distributed system, you must install software on your computers in a particular order.

*Note:* Be sure to consult the *Deployment Steps* file that accompanies your deployment plan. This document lists in greater detail the installation order for your particular SAS order.


   *Note:* Many SAS deployments include several (real or virtual) machines, each running one or more tiers of the SAS infrastructure. Each SAS tier is deployed separately. You should perform a backup after deploying each SAS tier.

2. If you are configuring metadata server clusters, install the SAS Metadata Server nodes next.
3. Install the SAS application servers (such as the SAS Workspace Server or the SAS Stored Process Server) on machines other than the SAS Metadata Server machine.

4. If your deployment plan separates SAS Web Server from SAS Web Application Server, install SAS Web Server first.

5. Install the middle tier.

6. For SAS deployments where the SAS Metadata Server and middle tier reside on the same machine, remember that the SAS server tier (the compute tier) must be configured after the SAS Metadata Server and before the middle tier.

7. If you are implementing SAS Web Application Server clusters, install the application server nodes next.

   Note: You cannot start a configuration or software update to a middle-tier cluster node until the primary middle-tier configuration has completed.

8. Install software on machines that host only clients last.

**SAS Metadata Server Recommendations**

Consider the following SAS Metadata Server recommendations:

- dedicate a machine
  
  A machine running only the SAS Metadata Server greatly simplifies tuning, management, and diagnostics.

- increase ulimit settings (SAS 9.4 only)
  
  On UNIX, before you run the SAS Deployment Wizard on your SAS Metadata Server machine, you should increase per-user limits (ulimit) for open file descriptors and processes.

  SAS recommends that you have a soft limit of 65536 for both the number of open file descriptors (ulimit --n) and the maximum number of processes (ulimit --u).

  Contact your system administrator for details about increasing these ulimit settings.

For more recommendations, see the SAS Metadata Server section in the system requirements for your SAS product.

**Repository Considerations**

Your metadata repositories should reside either on a local file system or on a high-performance, high-availability network file system. For more information about metadata repositories, see “About SAS Metadata Repositories” in *SAS Intelligence Platform: System Administration Guide*.

**Locale and Encoding Considerations**

**Locale and Encoding Preparation**

Before you invoke the SAS Deployment Wizard, your operating system must match the locale and encoding that you plan to select on the Select Regional Settings page of the deployment wizard.
On Windows, the Windows system locale must match your selection on the Select Regional Settings page. For more information, see your Windows documentation.

On UNIX and Linux, the LANG environment variable setting must match the locale and encoding you plan to select for SAS Foundation and SAS Metadata Server.

In addition, if you plan to select **Configure as a Unicode server**, you must use UTF-8 as your operating system encoding.

For example, on Linux, if you plan to choose the locale **Japanese (Japan)** and the default encoding on the Select Regional Settings page, you would enter the following command:

```bash
$ LANG=ja_JP.eucjp; export LANG
```

On UNIX and Linux, there are differences in the spelling and case of language-encoding pairs. For this reason, you should run the `locale` command to check the current locale and to verify the spelling of locale values. A misspelling causes the LANG environment variable to be improperly set and interferes with propagation to other locale-related environment variables. For example, consider the case and spelling differences across Linux and UNIX for US English, UTF8:

- On Linux and Solaris:
  ```
  en_US.UTF-8
  ```
- On AIX:
  ```
  EN_US.UTF-8
  ```
- On HP-UX:
  ```
  en_US.utf8
  ```

### Locale and Encoding Settings in the Deployment Wizard

The SAS Deployment Wizard enables you to select the default locale and languages for the deployment wizard and for SAS 9.4. (A separate tool, the SAS Deployment
Manager, enables you to configure the locale of SAS Java clients. For more information, see “Change Locale for SAS” on page 207.)

One of the first dialog boxes in the deployment wizard is the Choose Language dialog box.

The language that you select in the Choose Language dialog box specifies the language that the deployment wizard uses to display text.

You can also set the languages that your SAS 9.4 products use.

**Figure 6.3  Select Language Support Page**

The deployment wizard also prompts you for your locale setting.
The locale setting controls how SAS 9.4 displays the following:

- text
- numbers
- currencies
- dates
- times
- data (sorting)

The locale setting specifies the language that the SAS Metadata Server uses to store objects in its repository.

On Windows and UNIX machines, you can choose to configure SAS 9.4 as a Unicode server. Unicode can be particularly useful when your SAS deployment supports multiple languages. Choosing to configure SAS 9.4 as a Unicode server means that SAS reads and writes all of its data sets, catalogs, and text files in UTF-8 encoding. UTF-8 encoding supports characters from all of the world’s languages, including characters found in both single- and double-byte character sets. However, UTF-8 can make data sharing with SAS sites that use default encodings problematic.

If configuring SAS 9.4 as a Unicode server is not a viable option for your deployment, you can implement a more advanced deployment that requires adding a server configuration to support a separate encoding. This separate server configuration can be used by the SAS Customer Intelligence system only. For more information, see Adding Additional SAS Workspace Servers to Support Multiple Encodings.

**CAUTION:**

The SAS automated deployment tools do not support changing locale after SAS is initially deployed. For example, you cannot initially deploy SAS as English (US), and then reconfigure SAS with the SAS Deployment Manager and change the locale to French.
For single-byte character set languages, the chosen locale is set in the configuration file that matches the default language. It is also set in the English configuration file. For example, if you choose fr_FR as your locale, this value is added to both the French and English configuration files.

For double-byte character set languages, the chosen locale is set in the configuration file that matches the default language. English (US) is set as the default locale for English (SBCS), with some exceptions.

When a locale is set, a default encoding is used for that locale and the operating system.

For more information about how SAS supports locales and encodings, see the SAS National Language Support (NLS): Reference Guide.

**Host Names**

The SAS Deployment Wizard follows the DoD Internet Host Table Specification and does not allow the underscore character (_) in host names. For more information about what constitutes a valid host name, see https://tools.ietf.org/html/rfc952.

**How the SAS Deployment Wizard Names SAS Web Application Servers**

The SAS Deployment Wizard creates multiple SAS Web Application Servers as needed based on the products in your SAS order. By default, each SAS web application is assigned to a specific SAS Web Application Server for deployment. This distribution helps balance the load on each server and defines a recommended number of servers based on the products in each configuration.

Most of the time, the deployment wizard numbers these servers sequentially (for example, SASserver1, SASserver2, and SASserver3). However, depending on your particular SAS order, the default servers might not be named sequentially.

If you use the default names (for example, SASserver\text{n}) in your configuration, then you should maintain the default numbering scheme.

**Whitelist for Websites That Access SAS**

Starting with SAS 9.4M3, websites that link directly to your SAS web applications via URLs must be added to a whitelist (or security filter) of allowed sites. This provides protection against a browser-based vulnerability referred to as cross-site request forgery (CSRF). Any website that performs activities such as retrieving reports, using a single sign-on session, or linking to a SAS web application needs to be explicitly added to the whitelist. The default configuration includes only SAS applications. Users who link to a SAS application from a company intranet or portal page that is not hosted in the SAS installation will encounter access denied messages.

The SAS Deployment Wizard prompts you for a whitelist setting. Updates to the whitelist can be made later using SAS Management Console.

**Reviewing Third-Party Database Requirements**

The SAS 9.4 middle-tier software and certain SAS solutions use the SAS Web Infrastructure Platform Data Server to store transactions. The data server relies on PostgreSQL 9.1.9 and is configured specifically to support SAS 9.4 software.

Make sure that you follow these general hardware requirements for Postgres:
In postgresql.conf, make sure that \texttt{fsync=on}.

(The storage device hosting Postgres must support its operating system \texttt{FSYNC}() call.)

- The storage device should use ECC (error-correcting code) physical memory (RAM).

- As specified by Postgres, do not use regular shared storage that is mapped to a network drive (Windows) or mounted as an NFS drive (UNIX).

For more information, see PostgreSQL documentation.

\textit{Note:} The database used by SAS Environment Manager, the SAS Deployment Backup and Recovery Tool, and certain SAS solutions such as SAS Visual Analytics is PostgreSQL regardless of the database that you choose for the SAS Web Infrastructure Platform.

SAS enables you to use a database management system other than the SAS Web Infrastructure Platform Data Server for storing transactional data for the SAS middle tier and certain SAS solutions. (The deployment wizard asks you about this if you choose the Custom prompting level.) In SAS 9.4, the following third-party databases are supported:

- DB2
- MySQL
- Oracle
- PostgreSQL
- SQL Server

Third-party databases often have requirements that you need to know about, such as database name limits, minimum tablespace sizes, and so on. Make sure that you review Appendix 4, “Configuring an Alternate Database for SAS Web Infrastructure Platform Data Server,” on page 209.

If you want to use a third-party database, you must deselect \texttt{Use SAS Web Infrastructure Platform Data Server} on the SAS Web Infrastructure Platform Database: Data Server page during SAS installation and configuration.
On the SAS Web Infrastructure Platform: Database Type page, select the database type for the database that you plan to use.

The deployment wizard prompts you for additional information about your database, including a database name, user ID and password. The user ID that you specify must have permission to insert, update, and delete database records.
Note: If your site uses network-attached storage (NAS) or storage area network (SAN) systems that have been verified for use with database systems (such as Oracle and DB2), follow your storage provider’s instructions for configuration.

**Deploying SAS BI Lineage Scheduling Server When LSF Scheduler Is on a Separate Machine from the SAS Workspace Server**

The most common topology involving the LSF Scheduler is to locate it on the same machine as the SAS Workspace Server.

However, here is an alternative topology:

- Machine 1 hosts the SAS Metadata Server and SAS Workspace Server.
- Machine 2 hosts the LSF Scheduler and SAS BI Lineage Scheduling Server.

For this alternative topology, you run the SAS Deployment Wizard twice: first on machine 1 and then on machine 2.

To deploy the SAS BI Lineage Scheduling Server when the LSF Scheduler is installed on a separate machine from the SAS Workspace Server, follow these steps:

1. Log on to machine 1 (the SAS Metadata Server and SAS Workspace Server machine) and run the SAS Deployment Wizard. On the Select Products to Install page, select the **Server and Middle Tier** machine. Make sure that you deselect **SAS BI Lineage Scheduling Server**.

2. On the Select Configuration Prompting Level page, select **Custom** for the prompting level.
3. On the Select Products to Configure page, deselect the following:
   • **Platform Process Manager**
   • **SAS BI Lineage Scheduling Server**

4. On the SAS Web Report Studio: Scheduling page, deselect **Enable Scheduling**.
5. Answer the remaining deployment wizard prompts.

   The wizard installs and initially configures machine 1 based on the input that you have provided.

6. After the wizard completes running on machine 1, back up your metadata repositories and your SAS configuration directory before you run the SAS Deployment Wizard on the next machine. For more information, see “About the Metadata Server Backup Facility” in *SAS Intelligence Platform: System Administration Guide*.

7. Be sure to restart any servers that you stopped to perform the backup.

8. A file named Instructions.html is in the SAS configuration directory. Review this file and complete any manual configuration tasks. Perform all necessary backups. Log on to machine 2 (the SAS BI Lineage Scheduling Server and LSF Scheduler machine) and run the SAS Deployment Wizard a second time using the same deployment plan.

9. On the Select Products to Install page, select the **Server and Middle Tier** machine.

10. Select only the following products to install:
     - SAS Management Console
     - SAS BI Lineage Plug-in for SAS Management Console
     - SAS BI Lineage Scheduling Server
     - SAS Intelligence Platform Object Framework (not pictured)
11. On the Select Configuration Prompting Level page, select **Custom** for the prompting level.

12. On the Select Products to Configure page, select only the following products:
   - SAS Management Console
   - Platform Process Manager
   - SAS BI Lineage Scheduling Server
13. Answer the remaining deployment wizard prompts.

The wizard installs and initially configures machine 2 based on the input that you have provided.

14. If you are deploying a middle-tier machine and you opted not to automatically deploy your SAS web applications, then you must manually deploy them. For more information, go to the Third-Party Software Requirements site at http://support.sas.com/resources/thirdpartysupport/v94/appservers/index.html, and select your web application server.

15. When you are finished installing and configuring SAS on each machine, proceed to the section “Validate the SAS 9.4 Servers” on page 119.

Install and Configure SAS Interactively

Installing and configuring SAS interactively with the SAS Deployment Wizard consists of two main phases.

• Providing installation information such as the following:
  • installation type (planned (driven by deployment) or unplanned)
  • deployment plan location (if applicable)
  • machine type (single machine, server machine, and so on)
  • SAS components to be installed on the machine
  • valid paths to any required pre-installed, third-party software

• Providing configuration information such as the following:
  • prompting level (express, typical, or custom)
  • SAS products to be configured on the machine
This section describes some of the more important configuration pages that you encounter during the installation and configuration phases of a SAS 9.4 deployment. The type and number of configuration-related pages that you receive depend on the prompting level that you choose, the SAS tier that you are currently deploying, and the contents of your SAS 9.4 order.

Note: To run the SAS Deployment Wizard on an operating system that is not a windowing system, see the SAS Deployment Wizard and SAS Deployment Manager User’s Guide.

To install and configure SAS interactively, complete these steps:

1. If you are using HTTPS self-signed or site-signed certificates, you must deploy SAS Intelligence Platform in the following manner:
   a. Install SAS Intelligence Platform and the new trusted CA bundle.
   b. Add your HTTPS self-signed and site-signed certificates to the trusted CA bundle.
   c. Configure SAS Intelligence Platform.
   d. Repeat these steps on each machine in your deployment. This means that you must add certificates to the trusted CA bundle on each and every machine.

   For more information, see SAS Intelligence Platform: Middle-Tier Administration Guide.

2. Make sure that you have reviewed all appropriate documentation. The deployment wizard checks the version of the operating system and does not proceed if the version is incorrect.

3. Verify that you have performed the earlier required steps outlined in “Deployment Process Overview: Step Five” on page 72.

4. If you use any garbage collection scripts, temporarily suspend them while the deployment wizard runs. If any of the wizard’s temporary files are deleted during execution, configuration failures can occur.

5. If you are adding on SAS Visual Analytics or SAS Visual Analytics Administration and Reporting to an existing SAS 9.4 deployment, make sure that you review “Add SAS Visual Analytics Administration and Reporting” on page 183 before proceeding.

6. Review information about where to store your metadata repositories in “Repository Considerations” on page 79.

7. If you are deploying SAS on multiple machines, make sure that you are following the process in “Installation Order Rules for Multiple Machine Deployments” on page 78.
8. Log on to a machine with a user ID that meets the requirements for the appropriate operating system.
   - Windows:
     Use an account that is available in the long term (for future SAS maintenance). It must be a member of the Administrators group.
   - UNIX:
     Use the same account on all machines on which you are deploying SAS. Do not use root.
   - z/OS:
     Use the same account on all machines on which you are deploying SAS.

9. Start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the command appropriate for your operating system.

   Table 6.2 Start-Up Commands for the SAS Deployment Wizard

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>setup.exe</td>
</tr>
<tr>
<td>UNIX</td>
<td>setup.sh</td>
</tr>
<tr>
<td>z/OS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For the first invocation of the deployment wizard to install the SAS Metadata Server as a 64-bit application: setup.rexx -z64</td>
</tr>
<tr>
<td></td>
<td>For the second invocation of the deployment wizard to install the remainder of your SAS 9.4 order as a 31-bit application: setup.rexx</td>
</tr>
<tr>
<td></td>
<td>To use a temporary directory other than /tmp, specify -templocation new-temp-dir.</td>
</tr>
</tbody>
</table>

   Note: In SAS 9.4M2, the deployment wizard automatically records your responses regardless of whether you run the wizard with the -RECORD option. This record of your responses is written to a file called ResponseRecord_yyyym-d-dh-mm-ss.log in the following location: C:\Users\SAS-Installer\AppData\Local\SAS\SASDeploymentWizard (Windows) and home-directory/.SASAppData/SASDeploymentWizard (UNIX and z/OS).

   You should see a welcome page.

10. Choose Language

   Select the language for the deployment wizard, and click OK.
   - From the drop-down list, select the language that you want the deployment wizard to use when it displays text.
     For more information, see “Locale and Encoding Considerations” on page 79.

11. Select Deployment Task

   Select the deployment task that you want to perform, and click Next.
   - Select Install SAS Software.
12. Specify SAS Home

Specify the location where you want to install SAS, and click Next.

- If you want to specify a different location other than the default, enter the location in SAS Home. Click Next.

**CAUTION:**
The directory path for the SAS installation directory (SASHome) cannot contain parentheses. Using parentheses causes SAS Environment Manager scripts to fail.

Although your SAS installation directory (which the wizard refers to as SASHome) and SAS configuration directories can share the same parent directory, one directory cannot reside inside another. Also, the SAS installation directory should not be a directory within your SAS Software Depot.

**CAUTION:**
There should be one SAS installation directory (SASHome) per SAS deployment. Therefore, when deploying multiple tiers on the same machine, the SAS installation directory should always be shared. By contrast, when deploying different versions of SAS on the same machine, there should be a unique SAS installation directory for each SAS version.

*Note:* On z/OS, the length of the SAS installation directory path cannot exceed 54 characters.

*Note:* On Windows, the deployment wizard prompts you for the SAS installation directory (SASHome) the first time you run the wizard. In any subsequent wizard sessions on the same machine, the wizard uses the previously specified location for SASHome.

13. Select Deployment Type

Specify the type of deployment that you want to perform. Click Next.

- Confirm that **Perform a Planned Deployment**, **Install SAS Software**, and **Configure SAS Software** are all selected unless you are providing your own TLS certificates.
14. Specify Deployment Plan

Specify the type of deployment plan that you are using, and click Next.

- customized deployment plan
  
  Choose Specify the full path to a customized deployment plan, and click Browse to navigate to the plan file (plan.xml).

- standard deployment plan
  
  Select Select a standard deployment plan and the appropriate plan in the drop-down menu.

For more information, see “About Deployment Plans” on page 72.

15. Select Deployment Step and Products to Install

Select the machine on which you are installing software, and select the SAS products that you want to install. When you are finished, click Next.

- From the Deployment Step drop-down menu, select the machine on which you are installing software.

  Note: If you are deploying SAS on multiple machines, make sure that you are following the process described in “Installation Order Rules for Multiple Machine Deployments” on page 78.

  Note: When a machine has multiple deployment steps, the deployment wizard attempts to default to the correct step. In some cases, this can be difficult for the wizard to determine. Therefore, always be careful to choose the correct step and avoid merely choosing the default step.

For information about SAS Web Parts for Microsoft SharePoint, see Appendix 1, “Deploying SAS Web Parts for Microsoft SharePoint,” on page 145.

- All products in the table are installed by default. Deselect any products that you do not want to install. When you are finished, click Next.

  Note: Included in your SAS 9.4 order are procedures that enable you to take advantage of additional functionality that is provided by SAS Viya. You must
have a SAS Viya license to use the OPTNETWORK procedure and the procedures for these products:

- SAS Visual Data Mining and Machine Learning
- SAS Visual Statistics
- SAS Econometrics
- SAS Visual Forecasting

**Note:** If you are deploying a middle-tier node machine, make sure that SAS Web Application Server is selected.

**Note:** If you are deploying a SAS Data Management product, you should select a SAS Quality Knowledge Base product.

16. Select SAS Foundation Mode

Specify which mode of SAS Foundation to install, and click **Next**.

- You see this page when you are installing on a 64-bit machine and your order contains software for both 32-bit and 64-bit machines.
- Select **64-bit Native Mode** to take full advantage of your 64-bit machine and the additional functionality provided by SAS Viya.
- Select **32-bit Compatibility Mode** if you are concerned about compatibility with 32-bit software that you have installed or might eventually install.

17. Select SAS Enterprise Guide Mode

Specify which mode of SAS Enterprise Guide to install, and click **Next**.

- You see this page when you are installing on a 64-bit machine and your order contains software for both 32-bit and 64-bit machines.
- Select **64-bit Native Mode** to take full advantage of your 64-bit machine.
- Select **32-bit Compatibility Mode** if you are concerned about compatibility with 32-bit software that you have installed or might eventually install.
Note: Some products have a dependency on 32-bit SAS Enterprise Guide. If one of those products is in the list of products to be installed and you choose to install the 64-bit version of SAS Enterprise Guide, the 32-bit version is installed also.

18. Select SAS Add-in for Microsoft Office Mode

(Windows only) Specify which mode of SAS Add-In for Microsoft Office to install, and click Next. (This page appears when the deployment wizard is unable to detect the bit capacity of Microsoft Office.)

- Select 32-bit Compatibility Mode if you are running 32-bit Microsoft Office.
  
  Note: The bit capacity of SAS Add-In for Microsoft Office must match the bit capacity of Microsoft Office.

- Select 64-bit Native Mode if you are running 64-bit Microsoft Office.

19. Specify SAS Installation Data File

Specify the path to your SAS installation data file, and click Next.

- Click Browse and locate your SAS installation data file.

The SAS installation data file contains information about the software that you have licensed for the current machine.

CAUTION:

Be careful to use the correct SAS installation data file that contains the SAS products that you are planning to install. Using an incorrect file can cause installation failure for SAS add-on products or other errors later when attempting to run SAS. For multiple machine deployments, during the clients step, choose the SAS installation data file for the server machine that is associated with the clients being installed.

20. Select Language Support

Select the languages for your SAS software to support, and click Next.

- Add additional languages that you want SAS software to support.

  By default, SAS attempts to support all languages for which your machine’s operating system is configured.

21. Select Regional Settings

Select the language, region, and locale setting that affect how SAS displays text, numbers, currencies, dates, and times, and specify how SAS sorts data. Click Next.

- Accept the default value of English (United States) or select a different language, region, and locale in Language (Region) [Locale].

- Select Configure as a Unicode server if you want to configure SAS as a Unicode server.

  For more information, see “Locale and Encoding Considerations” on page 79.

22. Select Authentication Type

(UNIX only) Specify the type of authentication for this machine, and click Next.

- Select Use PAM Authentication if your system uses pluggable authentication modules (PAM).

  In addition, you might need to update your PAM configuration files for SAS 9.4 to use PAM authentication. For more information, see the Configuration Guide for SAS Foundation for UNIX Environments.
If you are uncertain whether your system uses PAM for authentication, contact your system administrator.

**Note:** Do not select PAM authentication if you know that your system uses `/etc/password` or `/etc/shadow` authentication.

23. Default Product for SAS Filetypes

(Windows only) Indicate the SAS product that your system will use by default to open SAS file types (.sas, .sas7bdat, and so on) that are shared by more than one product. Click Next.

- Select **SAS Foundation** as the SAS program that will launch and open SAS files by default when you double-click the file in Windows Explorer.
- Select **SAS Enterprise Guide** as the SAS program that will launch and open SAS files by default when you double-click the file in Windows Explorer.

24. Select Microsoft Office Applications

(Windows only) Choose the Microsoft Office applications for which you want the SAS Add-In for Microsoft Office activated, and click Next.

- When the Microsoft Office application is launched, it automatically activates SAS Add-In for Microsoft Office. A user sees either a **SAS** tab on the ribbon (Microsoft Office 2007, 2010, and 2013) or a **SAS** menu and toolbars (Microsoft Office 2003). To activate the SAS Add-In for Microsoft Office in Microsoft Excel, Word, PowerPoint, or Outlook after the installation, you can run SwitcherUtility.exe. For more information, see the Help for the SAS Add-In for Microsoft Office.

25. SAS Environments URL

Specify the URL for the file that defines SAS environments, and click Next.

- In **SAS Environments URL**, enter the URL for the file that defines SAS environments.

  The SAS environment file, named sas-environment.xml, specifies a set of SAS deployments at your site. Your administrator makes this file available on your site’s network and can provide you with its URL. To log on to some client applications, the URL must be specified in this dialog box. If the URL is not known at this time, you can continue and provide the URL later.

  If you use SAS Web Server, then the URL should resemble `protocol://hostname:port/sas/sas-environment.xml`, where `hostname` is the fully qualified host name of your machine and `port` is the default port for SAS Web Server. (For an unsecure port, use 80 on Windows and 7980 on UNIX. For a secure port, use 443 on Windows and 8343 on UNIX.)

  If you use a different web server or no web server, leave this field blank. Follow the instructions for the sas-environment.xml file in the Instructions.html document created by the SAS Deployment Wizard after your configuration is completed to find the file and deploy it on your web server.

  For more information, see “Configure the SAS Environment File” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

26. Specify Remote Communication Configuration

Specify the configuration for communication with the SAS Deployment Agent, and click Next.

- If you want to change the default port (5660) for communication with the SAS Deployment Agent, enter the new port in **Port**.
For more information, see “SAS Deployment Agents” on page 75.

- In **Specify how to secure the remote connection**, choose one of the following selections:
  - Select **Generate credentials to secure the connection** if you want the deployment wizard to create a self-signed certificate, generate a keystore, and import the certificate into the keystore.
  - Select **Specify existing credentials to secure the connection** if you have already implemented CA-signed, site-signed, or self-signed certificates. On the next page, the wizard prompts you for the keystore location and password.
  - Select **Do not secure the connection** if you do not want to secure SAS Deployment Agent communication or you have not yet implemented certificates.

You can set up certificates later on your own or by using the SAS Deployment Manager. Do not start the SAS Deployment Agent until you have completed the manual security configuration.

For more information, see *SAS Intelligence Platform: Middle-Tier Administration Guide*.

27. The deployment wizard scans your machine to determine whether any SAS files are locked or do not have Write permission. If no action is required, click **Next**.

- If the wizard lists any files in the text box, then while the wizard is still running, quit SAS, and add Write permission to each file listed. When you are finished, click **Next**.

28. (z/OS only) Provide input for the following prompts:

  *Note:* For more information, see the *SAS Deployment Wizard and SAS Deployment Manager User’s Guide*.

  - **FTP Batch Generation**
Specify the fully qualified host name or IP address of the z/OS mainframe machine on which you are deploying SAS. Provide a valid user ID and password with which the SAS Deployment Wizard will transfer deployment information to the mainframe machine.

- **Specify Jobcard Information**
  Specify the job account, programmer name, message class, message level, time, and region values. For more information, see your z/OS documentation.

- **Select Installation Action**
  Choose A - Install a new SAS system.

- **Specify New Installation Qualifier**
  Specify the path where you want to install SAS. You can choose to require Storage Management Subsystem (SMS) parameters. For more information, see your z/OS documentation.

- **Specify IBM’s SMS Parameters**
  If you chose to require SMS parameters on the previous page, enter them here. For more information, see your z/OS documentation.

- **Specify Parameters**
  Specify parameters that are used in various DD statements throughout the installation. For more information, see your IBM JCL documentation.

- **Specify Entry Point**
  Specify the parameters for various ways that SAS can be run with different performance implications. Choose SAS (default entry point) to run the unbundled configuration. Choose SASB to run the bundled configuration. Choose SASLPA to run the bundled configuration with some modules installed in the link pack area (LPA).

- **Specify Parameters**
  Specify additional parameters for DD statements. VOLDISK designates the VOLSER that the installed data sets will go to. For more information, see your IBM JCL documentation.

- **Specify Parameters**
  Specify parameters used for reblocking the SAS load modules to a library with an optimum block size.

29. If you use a third-party database and SAS/ACCESS is part of your order, select the software version for the third-party database.

The deployment wizard uses your selection to configure SAS/ACCESS for the correct version of the third-party database.

Make sure that you perform any additional configuration on your system, such as installing the third-party database client and configuring the system environment for access to the native client libraries. For more information about the correct environment variables, go to the SAS Install Center at [http://support.sas.com/documentation/installcenter/94](http://support.sas.com/documentation/installcenter/94) and use the operating system and SAS version to locate the appropriate SAS Foundation configuration guide.

30. Review Required Software
Review the list of third-party software that is required for the SAS software that you are installing on the current machine, and click Next. (The list depends on the SAS software that you are installing.)

- On the subsequent pages, be prepared to provide paths to these third-party applications. The number of wizard pages varies depending on the SAS software that you are installing on the current machine.

  Note: You must provide valid paths to the third-party applications or the SAS Deployment Wizard will not let you continue with the installation.

For more information, see the following resources:

“Pre-installation Checklists for Third-Party Products” on page 67

Third-Party Software for SAS 9.4

31. Specify Software Location

Specify the installation directory for the required software, and click Next.

- In the field, enter the installation directory for the required third-party software.

32. Select Configuration Prompting Level

Specify the amount of information that you want to configure by selecting one of three prompting levels. Click Next.

- Express

  Displays the minimum set of wizard pages needed to complete the SAS configuration.

  Note: When deploying the SAS middle tier, the SAS Deployment Wizard automatically configures your SAS Web Application Server. To disable this feature, run the wizard using either the Typical or Custom prompting level. Manually configuring your SAS middle tier is an advanced task and requires using other documents such as your Instructions.html file.

- Typical

  Displays the basic set of wizard pages needed to complete the SAS configuration.

- Custom

  Displays all the wizard pages to complete the SAS configuration.

33. Provide the remaining configuration information as the wizard prompts you for it.

  Note: This section describes some of the more important pages that you encounter during the configuration phase of a SAS 9.4 deployment. The options for which the SAS Deployment Wizard prompts you depends on which SAS products are identified in your deployment plan. In multiple machine deployments, it also depends on which machine you are currently deploying. For information about all SAS Deployment Wizard prompts, see the online Help for the wizard dialog box in question.

Specify Configuration Information

Specify the directory for SAS configuration files and logs. Select a configuration level. Click Next.

- In Configuration Directory, select the directory for SAS configuration files and logs.

  In UNIX environments, the Installer generally overrides the default configuration directory with the site’s preferred location (for
example, /opt/sas/config). The Installer must have Write permission on this path.

- In **Configuration Level**, select the configuration level (for example, **Lev1** indicates production).

**Note:** The last digit of the default port number reflects the configuration level. For example, when you select **Lev1**, the default port for the SAS Metadata Server is 8561. If you select another level, such as **Lev2**, the wizard changes the default port to 8562.

For more information, see “Overview of the Configuration Directory Structure” in *SAS Intelligence Platform: System Administration Guide*.

**Note:** Although your SAS installation directory and SAS configuration directory can share the same parent directory, one directory should not reside inside another. Specifying the configuration directory under the SAS installation directory or vice versa can lead to file permission issues because of the need to manage installed files differently from site-specific configurations.

On z/OS, the mount point must exist. The SAS Deployment Wizard creates the necessary subdirectories.

**Local Machine Name**
Identify the local machine. Click **Next**.

- In **Fully-qualified Local Host Name**, enter the complete name of the local host.

  The fully qualified local host name typically takes the form of the local host name plus the domain name server (for example, MyMachine.example.com).

**Note:** As noted in RFC 952, underscores and whitespace characters are not allowed in host names.

**TIP**  If you do not know the domain name server used at your site, check with your system administrator.

- In **Short Local Host Name**, enter a short host name.

  The short local host name is the abbreviated, more common name of the host, usually a single word (for example, MyMachine).

**Migration Information**
Specify whether to perform migration. Specify the path to the migration package. Click **Next**.

- Select **Perform migration** if you are migrating to SAS 9.4.

  **Note:** You can ignore this page unless you are migrating.

  For more information, see “Introduction” in *SAS Intelligence Platform: Migration Guide*.

**Authentication Domain**
Specify the authentication domain that SAS uses to authenticate logins to servers. Click **Next**.

- Accept the default value (DefaultAuth) unless you are planning to use a different authentication domain for servers on this machine. For example, if the SAS Metadata Server is on Windows and the SAS Workspace Server is on UNIX, the workspace server might be assigned to a SAS authentication domain named UNIXAuth.
For more information, see “Manage Authentication Domains” in SAS Management Console: Guide to Users and Permissions.

Integrated Windows Authentication
Specify whether you want to use Integrated Windows Authentication (IWA) for SAS client/server connections. Click Next.

- Select Use Integrated Windows authentication (single sign-on) to configure SAS Workspace Servers running on Windows or UNIX to use IWA.

IWA uses a single sign-on feature that allows a user’s identity, obtained from authentication to the user’s desktop, to be securely passed from the desktop to other processes such as the SAS Metadata Server and the SAS Workspace Server running on either Windows or UNIX. The mechanism used is typically Kerberos, but on Windows, NTLM can be used.

Note: If you choose to use IWA, you cannot also implement token-based authentication.

You also encounter this page when deploying SAS Enterprise Guide and SAS Add-In for Microsoft Office. If you have not chosen IWA for the SAS Workspace Server, then choosing IWA for these products has no effect.


A SAS Metadata Server running on Windows uses IWA by default. For more information, see “SSPI System Option” in SAS Intelligence Platform: Application Server Administration Guide.

Token-based authentication
Specify whether you want to use token-based authentication for SAS client/server connections. Click Next.

- Select Use SAS token authentication to prompt clients of the SAS Workspace to request a token from the SAS Metadata Server.

SAS client applications obtain a connection to the SAS Metadata Server and request a SAS token to connect to the SAS Workspace Server. For the workspace server to be launched, a launch credential is defined for the workspace server by the SAS Spawned Servers account.

If token authentication is not used, SAS uses host authentication. Clients provide either an IWA token or a user name and password to authenticate to the workspace server.


Note: If you use token-based authentication, you cannot also implement IWA.

SAS Metadata Server
Specify SAS Metadata Server information. Click Next.

- In SAS Metadata Server Logical Name, enter the logical name of the SAS Metadata Server. The maximum number of characters in the name is 60. Do not use special characters (for example, hyphens, underscores, and so on). Use characters appropriate for an operating system subdirectory name. On UNIX, avoid shell characters that might cause unintended side effects.
By default, SAS prefixes the logical name with the application server name (SASMeta). A logical server is a container for definitions of physical servers. A logical server can have one server component for each SAS server type.

- **In SAS Metadata Server Name**, enter the name of the SAS Metadata Server. The maximum number of characters in the name is 60. Do not use special characters (for example, hyphens, underscores, and so on). Use characters appropriate for an operating system subdirectory name. On UNIX, avoid shell characters that might cause unintended side effects.

By default, SAS prefixes the logical name with the application server name (SASMeta). A server name is the definition of a physical server. Servers are contained within a logical server (server component) that matches its server type (for example, a SAS Metadata Server definition is contained in a logical SAS Metadata Server).

- **In Host Name**, enter the name of the machine on which the SAS Metadata Server runs.

- **In Port**, enter the SAS Metadata Server listening port. If you choose to not accept the default value, refer to your completed Pre-installation Checklist for the value that you should enter.

For more information, see “Overview of the SAS Metadata Server and Its Initial Configuration” in *SAS Intelligence Platform: System Administration Guide*.

**SAS Metadata Server: Override Backup Location**

Specify a different location for the SAS Metadata Server backup directory, if necessary. Click Next.

- If you want to change the location of the SAS Metadata Server backup directory, select **Override the default SAS Metadata Server backup directory**.

When configuring a metadata server cluster, you must specify a network file system path accessible to all nodes in the cluster.

For more information, see “Backing Up and Recovering the SAS Metadata Server” in *SAS Intelligence Platform: System Administration Guide*.

**SAS Metadata Server: Repository Configuration**

Specify the name and location of the metadata repositories and foundation repository. Click Next.

- **SAS Metadata Server Configuration Directory** is Read-only. It identifies the parent directory under which the metadata repositories and foundation repository reside.

After deployment, you should apply appropriate operating system security on this directory. For more information, see “First-Priority Setup Tasks” on page 132.

- **In Metadata Repository Root Directory**, enter the location of the metadata repositories. This location must be specified as a path relative to the SAS Metadata Server Configuration Directory. Each metadata repository created during configuration is a subdirectory in this location. Do not use special characters (for example, hyphens, underscores, and so on). Use characters appropriate for an operating system subdirectory name. On UNIX, avoid shell characters that might cause unintended side effects.

- **In Foundation Repository Name**, enter the name of the foundation repository and the name of the subdirectory (relative to the Metadata
Repository Root Directory) in which the foundation repository is located. The maximum number of characters in the name is 60. Do not use special characters (for example, hyphens, underscores, and so on). Use characters appropriate for an operating system subdirectory name. On UNIX, avoid shell characters that might cause unintended side effects.

SAS Metadata Server: Override Service Login Account
Specify whether you want to use a different service login account for the SAS Metadata Server. Click Next.

- If you want to change the service login account for the SAS Metadata Server, select Specify the service login account for the SAS Metadata Server. The LocalSystem account is the default Windows service login account for the SAS Metadata Server.

When configuring a metadata server cluster on Windows, you must specify the external user account that is used to start the SAS Metadata Server. This user account must be the same account that you specify to start the other nodes. The deployment wizard automatically grants the Log on as a service Windows user right if the user account does not already have it.

For more information, see “Back up and Recovering the SAS Metadata Server” in SAS Intelligence Platform: System Administration Guide.

Deployment Accounts: Type of Accounts
Select the type of accounts to use for initial deployment SAS identities. Click Next.

- Select Use SAS internal accounts when appropriate for SAS to use accounts known only to SAS. Or, select Use external accounts for all identities.

If you selected internal accounts, SAS creates and authenticates internal accounts in metadata rather than using an operating system account.

Note: On Windows, whenever the deployment wizard prompts you for an external account, always enter a domain-qualified user account (for example, myDomain\myAccount).

For more information, see “Internal User Accounts” on page 8.

External Account: Installer
Specify the operating system account (external account) used to initialize the SAS Metadata Server. Click Next.

- In External User ID, enter the user ID for the external account that you are using to install and configure SAS.

Depending on the operating system, this account should meet the following requirements:

Windows:
Use a domain-qualified account that is available in the long term for future SAS maintenance. It must be a member of the Windows Administrators group.

UNIX:
Use the same account on all machines on which you are deploying SAS. Do not use root.

z/OS:
Use the same account on all machines on which you are deploying SAS.
• In **External Password**, enter the password for the user ID.
  For more information, see “Defining User Accounts” on page 8.

SAS Internal Account: Unrestricted Administrator
Enter the password for the first unrestricted administrator identity. Click **Next**.

• In **New Internal Password**, enter a password for the internal account (sasadm@saspw) that the wizard creates to serve as an unrestricted administrator for configuring the SAS Metadata Server.
  
  **Note:** Record this password because you will need it in the future.

• In **Confirm New Internal Password**, re-enter the password. Click **Next**.
  For more information, see “Defining User Accounts” on page 8.

Select **Set passwords using the Unrestricted Administrator password** if you want to reuse this password for the internal SAS Metadata Server accounts and SAS Web Infrastructure Platform Data Server accounts during this deployment. Selecting this option when running the deployment wizard with the Express prompting level reduces the number of configuration prompts.

  **Note:** There are password restrictions for SAS Web Infrastructure Platform Data Server. Make sure that your password meets the criteria described in “SAS Web Infrastructure Platform Data Server” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

  For more information, see “Reducing the Number of Password Prompts” on page 73.

SAS Internal Account: Trusted User
Specify the password for the SAS Trusted User identity. Click **Next**.

• In **New Internal Password**, enter a password for the internal account (sastrust@saspw) that the wizard creates to enable SAS server and spawner components to communicate securely with each other.
  
  **Note:** Record this password because you will need it in the future.

• In **Confirm New Internal Password**, re-enter the password. Click **Next**.
  For more information, see “Defining User Accounts” on page 8.

SAS BI Web Services: Authentication Method
Select the method by which users of SAS BI Web Services are authenticated. Click **Next**.

• In **Authentication Method**, make a selection.
  
  • **SAS Authentication** is managed by the SAS Metadata Server.
  
  • **Web Authentication** is managed by the SAS Web Application Server using container-based authentication or a third-party product.

Selecting **Web Authentication** has these effects:

• Web authentication for SAS BI Web Services for Java is partially configured. For more information, see “Secure SAS BI Web Services for Java” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

• There is no effect on BI web applications (such as SAS Web Report Studio, SAS Information Delivery Portal, and so on). You have to configure web authentication for these BI web applications.
Anonymous Web Access
When using SAS authentication, select this option to set up a SAS identity for anonymous access to certain web services and web applications that support this feature. Click Next.

- Select **Enable anonymous web access** to set up a SAS identity for anonymous access to certain web services and web applications that support this feature.

SAS BI Web Services for Java and .NET, the SAS Stored Process Web Application, and SAS Visual Analytics Guest Access are the only components that support this feature.

For more information, see “PUBLIC Access and Anonymous Access” in *SAS Intelligence Platform: Security Administration Guide*.

SAS Internal Account: Anonymous Web User
Enter the password for the anonymous web user identity. Click Next.

- In **New Internal Password**, enter a password for the internal SAS account that the wizard uses to grant clients access to applicable SAS Web Infrastructure Platform applications such as SAS BI Web Services and the SAS Stored Process Web Application.

When SAS authentication is being used and the user has not preemptively specified credentials, the client is given access to these applications under the anonymous web user identity.

For more information, see “Use the SAS Anonymous Web User with SAS Authentication” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

**Note:** Record this password because you will need it in the future.

- In **Confirm New Internal Password**, re-enter the password. Click Next.

External Account: SAS Spawned Servers Account
Specify the credentials used to launch the back-end SAS Stored Process Server and SAS Pooled Workspace Server. Click Next.

- In **External User ID**, enter the user ID to start the SAS Pooled Workspace Server and the SAS Stored Process Server.

**Note:** On Windows, enter a domain-qualified user ID.

- In **External Password**, enter the password for the external user ID.

**Note:** Record this password because you will need it in the future.

For more information, see “Defining User Accounts” on page 8.

Server Encryption
Select the encryption level and algorithm that SAS clients and servers use to connect to the SAS Metadata Server. Click Next.

- In **Encryption Level**, select **Credentials** to encrypt only login credentials. Select **Everything** to encrypt all communication with the SAS Metadata Server.

Selecting **Everything** can affect your SAS performance.
• In **Encryption Algorithm**, you can specify an encryption algorithm other than SAS Proprietary. Available algorithms are RC2, RC4, DES, Triple DES, and AES.

For more information, see “Encryption Model” in *SAS Intelligence Platform: Security Administration Guide* and *Encryption in SAS*.

Client-side Credentials Policy
Specify whether users are allowed client-side storage of credentials. Click **Next**.

• Select **Allow users to save credentials in client-side connection profiles** to allow users to save their user IDs and passwords in client-side connection profiles.

When this option is selected, SAS enables the OMA_SASSEC_LOCAL_PW_SAVE option in the omaconfig.xml file.

For more information, see “Reference Information for omaconfig.xml” in *SAS Intelligence Platform: System Administration Guide*.

Estimated System Size
Estimate the size of your system based on user number and workload size. Click **Next**.

• In **Size Estimate**, select **Small System**, **Medium System**, or **Large System**. The wizard uses your sizing estimate as a tuning hint during SAS server configuration. This option appears only during SAS Metadata Server configuration and it applies to all machines configured with this metadata server.

You might have to further refine individual tuning parameters after you have collected and evaluated system usage information.

For more information, see *SAS Web Applications: Tuning for Performance and Scalability*.

E-mail Server
Specify email server information. Click **Next**.

• In **Host Name**, enter the host name for an SMTP email server at your site. SAS uses this server to send alerts for system-related issues to an administrator (for example, the SAS Metadata Server detects a journaling issue).

The wizard uses this email server as the default for the application server to provide email services to various SAS clients. For example, with SAS Data Integration Studio, you can use a Publish to Email transformation to alert users about various data changes. For the SAS BI Dashboard to send alerts by email to dashboard users and administrators, the port and host name must be configured for the email server.

For more information, see “Pre-installation Checklist for Ports for SAS” on page 24 and “Managing Alert Email Options for the SAS Metadata Server” in *SAS Intelligence Platform: System Administration Guide*.

• In **Port**, enter the port that the SMTP email server uses.

For more information, see “Adding or Modifying Email Settings for SAS Application Servers” in *SAS Intelligence Platform: Application Server Administration Guide* and “Managing Alert Email Options for the SAS Metadata Server” in *SAS Intelligence Platform: System Administration Guide*. 
SAS Application Server: Server Context
Enter the name of the SAS Application Server. Click Next.

- In **SAS Application Server Context Name**, accept the default name (SASApp) or enter a different name. The wizard creates this name in SAS metadata.

  A server context is a SAS IOM server concept that describes how SAS Application Servers manage client requests. A SAS Application Server has awareness (or has context) of how it is being used and it makes decisions based on that awareness. The server context name is prepended to all server names specified in the server context.

  *Note:* The server context name must be unique and cannot contain spaces.

  For more information, see “Overview of SAS Application Servers” in *SAS Intelligence Platform: Application Server Administration Guide*.

SAS Pooled Workspace Server
Specify SAS Pooled Workspace Server information. Click Next.

- In **Logical SAS Pooled Workspace Server Name**, enter the name of the logical SAS Pooled Workspace Server. The wizard creates this name in SAS metadata.

- In **SAS Pooled Workspace Server Name**, enter the name of the SAS Pooled Workspace Server. The wizard creates this name in SAS metadata.

- In **Host Name**, enter the name of the machine on which the SAS Pooled Workspace Server runs. The machine name should match the name specified for the machine on which the SAS Object Spawner runs.

- In **Port**, enter the port on which the SAS Object Spawner listens for client requests to launch SAS Pooled Workspace Servers.

  For more information, see “Overview of Workspace Servers and Stored Process Servers” in *SAS Intelligence Platform: Application Server Administration Guide*.

SAS Web Infrastructure Platform Data Server
Specify SAS Web Infrastructure Platform Data Server information. Click Next.

- In **Host Name**, enter the fully qualified host name of the SAS Web Infrastructure Platform Data Server. Or, accept the default value.

  The default value is the host name where the deployment wizard is currently running. In most cases, the default value is correct. However, a machine can have more than one network interface card (NIC) or host name alias. If so, see your Pre-installation Checklist to determine whether the default value is correct.

- In **Port**, enter the TCP/IP port number on which SAS Web Infrastructure Platform Data Server listens. Or, accept the default value.

- In **Data Administrator**, enter the user ID for the user administering SAS Web Infrastructure Platform Data Server.

- In **Data Administrator Password**, enter the password for the user ID associated with the SAS Web Infrastructure Platform Data Server administrator.

  *Note:* There are password restrictions for SAS Web Infrastructure Platform Data Server. Make sure that your password meets the criteria described in “SAS
Web Infrastructure Platform Data Server” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

**Note:** Record this password because you will need it in the future.

- In **Confirm Password**, re-enter the password, and click **Next**.

For more information, see “Reviewing Third-Party Database Requirements” on page 83.

**Query Cache Library**

Enter the physical location where the SAS library exists for temporary files that are used when creating optimized tables for query lookup. Click **Next**.

- In **Query Cache Libref**, enter the SAS library reference that SAS uses to refer to the query optimizer SAS library.

  The name must be eight characters or less and should be unique within this repository. Librefs must start with a letter or underscore and contain only letters, numerals, or underscores. The typical installation libref name is wrstemp. The libref is used with the application server context name to form the SAS library name for the query optimizer SAS library.

- Select **Enable Query Cache** to allow the query optimizer to run. If not selected, then the query optimizer does not attempt to optimize queries and does not create temporary files for improving performance during rendering.

  A typical installation selects **Enable Query Cache**. The temporary files created within the query optimizer SAS library are visible to anyone with Read permission on the Renderer Optimizer directory. If you have security concerns about the authorization on this folder, you might want to not select this option.

  For more information, see “Using the Query Cache” in *SAS Intelligence Platform: Web Application Administration Guide*.

**Output Management Library**

Specify SAS library information for burst definition tables for reports that are distributed by email. Click **Next**.

- In **Output Management Library Directory**, enter the physical location where the SAS library exists for burst definition tables for reports that are distributed by email.

  A burst definition table contains email addresses, channels, and possibly BY group information.

- In **Output Management Library Libref**, enter the SAS library reference that SAS uses to refer to the output management library. The name must be eight characters or less and should be unique within this repository. Librefs must start with a letter or underscore and contain only letters, numerals, or underscores. The typical installation libref name is wrsdist. The libref is used with the application server context name to form the SAS library name for the output management library.

  For more information, see “Verifying Permissions for the Distribution Library” in *SAS Intelligence Platform: Web Application Administration Guide*.
Web Server: Automated or Manual Configuration Option
Specify whether you want the wizard to configure the SAS Web Server automatically. Click Next.

- If you want to configure the SAS Web Server manually, clear Configure SAS Web Server automatically.

  Select this option for the deployment wizard to automatically build and configure the SAS web applications and to configure a sample SAS Web Server for use with SAS 9.4. (To use this wizard feature, make sure that your SAS Web Application Server is not running before proceeding.)

  It is strongly recommended that you choose to automatically configure the SAS Web Server. If you need to make changes to the SAS Web Server after the automatic configuration, there are tools to help you reconfigure it.

  For more information, see “Scripting Tool for SAS Web Application Server” in SAS Intelligence Platform: Middle-Tier Administration Guide.

If you choose not to automatically configure your SAS Web Server, you are prompted for the SAS Web Application Server information, and deployment stages such as configure products, deploy web applications, and start SAS Web Application Servers execute to create instructions for manual configuration. When configuration is completed, follow the manual instructions about how to configure your SAS Web Server and deploy your SAS web applications available at http://support.sas.com/resources/thirdpartysupport/v94/appservers/index.html. (Select the product name of your SAS Web Application Server.)

Note: Manually configuring your SAS middle tier is an advanced task and requires using other documents such as your Instructions.html file.

SAS Web Server: Configuration
Specify SAS Web Server information. Click Next.

- The standard port for HTTP traffic is 80. If you want to change this for SAS Web Server, then specify a new port number in HTTP Port.

  Note: On UNIX systems, you must start servers as root if you want them to listen on ports lower than 1024. You should install and configure as a less-privileged user, and then start SAS Web Server manually as root.

  For more information, see “Pre-installation Checklist for Ports for SAS” on page 24 and “Managing Alert Email Options for the SAS Metadata Server” in SAS Intelligence Platform: System Administration Guide.

- The standard port for TLS traffic is 443. If you want to change this port for SAS Web Server, then specify a new port number in HTTPS Port. (See earlier note.)

- In Configured Protocol, select the communication protocol for SAS Web Server. There are two choices, HTTP Protocol (unsecured) and HTTP Protocol using Secure Sockets (secured).

  If you select HTTP Protocol using Secure Sockets, an X.509 certificate and RSA private key are required. The deployment wizard prompts you for the paths to these items on a later page. You can enter locations for these items or provide information to create them. For more information, see SAS Intelligence Platform: Middle-Tier Administration Guide.

  For more information, see SAS Intelligence Platform: Middle-Tier Administration Guide.
• In **Administrator Mail Address**, enter an email address for email to be sent to the SAS Web Server administrator.

Web Application Server: Multiple Servers
Specify whether to configure multiple SAS Web Application Servers on which to deploy SAS web applications. Click **Next**.

• Select **Configure multiple servers** to have the deployment wizard automatically configure multiple SAS Web Application Servers for you. The deployment wizard uses SAS best practices for choosing the best server to deploy each web application to.

In some situations, it might be preferable to split the SAS web applications across multiple SAS Web Application Servers. This is usually done for performance reasons.

If you choose to manually configure your SAS Web Application Servers, you are provided with recommended configuration values in a generated file (Instructions.html) when the deployment wizard completes.

More advanced performance configuration considerations are documented in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

Web Application Server: Server Configuration
Specify the SAS Web Application Server name and JVM options. Click **Next**.

• In **Server Name**, enter a logical name for your SAS Web Application Server. This name is displayed in your SAS Web Application Server administrative console and used in administrative scripting.

A suffix is automatically added to the name to distinguish cluster members. For example, if the name SAS1 is entered, the actual name is SAS1_1. If the cluster member multiplier provided on the next wizard page is greater than 1, additional servers are created with unique suffixes. For example, if the multiplier is 2, then servers named SAS1_1 and SAS1_2 are created.

**CAUTION:**
The server name cannot contain special characters (for example, periods, colons, underscores, and so on).

**CAUTION:**
The server name must be unique. Non-unique names cause your web configuration to fail.

• In **Additional JVM Options**, enter any additional Java options that you want the SAS Web Application Server JVM to use. These JVM options are appended to the end of the server’s command line. Deployment wizard default options can be overridden in this way.

Enter any additional Java options that you want the SAS Web Application Server JVM to use. These JVM options are appended to the end of the server's command line. Deployment wizard default options can be overridden in this way.

**Note:** Determine whether the machine that you are deploying SAS on has these characteristics:

• Uses IPv6 (Internet Protocol Version 6)
• Runs Windows
• Communicates with the SAS Foundation server tier.
If it does, then you must add the following JVM start-up options either now or later to your SAS Web Application Server start-up script:

- `java.net.preferIPv4Stack=false`
- `java.net.preferIPv6Addresses=true`

For more information, see “Designating Ports and Multicast Addresses” on page 22.

Web Applications: Automatic Deployment
Specify whether you want the deployment wizard to automatically deploy SAS web applications to the SAS Web Application Server. Click Next.

- Select Deploy web applications automatically for the deployment wizard to automatically deploy SAS web applications to the SAS Web Application Server.

  If you do not choose to deploy SAS web applications automatically, manual deployment instructions are written to the Instructions.html file during the web application deployment stage.

  Note: Manually deploying your SAS web applications is an advanced task and requires using other documents such as your Instructions.html file.

Regardless of whether you choose to automatically deploy your SAS web applications, when building web applications, the deployment wizard automatically explodes enterprise application archive (EAR) files.

For more information, see “Deploy Content Manually to the SAS Content Server” in SAS Intelligence Platform: Middle-Tier Administration Guide.

Web Applications: White List of Sites Allowed to Link to this SAS Installation
Enter a comma-delimited list of additional known hosts and domains to trust. Click Next.

- In URLs White List, enter a comma-delimited list of additional known hosts and domains to trust in the following form:

  http|https://host[:port]|domain/, ...  

  The valid URLs whitelist can include just a list of host names to trust. The valid URLs whitelist can also include wildcards such as * for host name and domain.

  Note: The port number must be specified if the whitelisted site uses port numbers other than the standard 80 for HTTP or 443 for HTTPS.

  For example:

  https://myserver:443/, http://example.com

  For security reasons, you must list any host name URL for any site that could redirect browsers to your software. This might include corporate sites linking to your software for reporting purposes or single sign-on servers.

  For example, if https://corporatePortal.company.com/ links to your server, then enter https://corporatePortal.company.com/ as one entry. This field enables you to add additional known hosts and domains to a preset list automatically created by the SAS configuration process.

  For more information, see “Configure the Cross Domain Proxy Servlet through a Whitelist” in SAS Intelligence Platform: Middle-Tier Administration Guide.
• Select **Enter advanced options for URL white list handling** to display an additional page on which you can specify advanced options for the whitelist.

**SAS Content Server: Repository Directory**

Specify SAS Content Server information. Click **Next**.

• In **Repository Directory**, enter the location for the SAS Content Server indexes and repository configuration file. Click **Browse** to search for this location.

  For more information, see “Administer the SAS Content Server” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

• Select **Start initial node as clustered** if this machine is (or might be) part of a clustered deployment.

**CAUTION:**

If you enable this option, you must establish a central backup vault for the SAS Deployment Backup and Recovery Tool. Starting in SAS 9.4M2, a vault is no longer required for clustered SAS Content Servers.

Deselect **Start initial node as clustered** if you are not deploying the SAS middle tier on a machine cluster. (This option enables journaling and the necessary cluster synchronization processes.)

If you redeploy the SAS middle tier on a machine cluster in the future, you can manually specify the Java system property `-Dcom.sas.server.isclustered=true` and restart the initial application server node. For more information, see “Add a Horizontal Cluster Member” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

**SAS Environment Manager: Administration Database Configuration**

Specify SAS Environment Manager information. Click **Next**.

• In **User ID**, enter the user ID for accessing the database used with your SAS Web Infrastructure Platform Database tables. This user ID must have the ability to insert, update, and delete records.

  By default, the SAS Environment Manager uses the Administration database on the SAS Web Infrastructure Platform Data Server. If you are using the SAS Web Infrastructure Platform Data Server, the user ID is Read-only.

  For more information, see “SAS Web Infrastructure Platform Data Server” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

• In **Password**, enter a valid password for the user ID.

  *Note:* Record this password because you will need it in the future.

• In **Confirm Password**, re-enter the password.

**SAS Internal Account: SAS Environment Manager Service Account**

Specify the password for the SAS Environment Manager Service. Click **Next**.

• In **SAS Environment Manager Service Account Password**, enter a password for the SAS Environment Manager Service account (sasevs@saspw).

  The password must contain at least six characters. Make sure that you enter the same password that was specified in any previous SAS Environment Manager configuration prompts.

  *Note:* Record this password because you will need it in the future.
This account is required for the SAS Environment Manager Service and its agent to communicate while monitoring the processes in your SAS deployment. This internal SAS account has unrestricted administrative access rights to the SAS Metadata Server.

- In **Confirm Password**, re-enter the password.

SAS Environment Manager: Database Configuration
Specify SAS Environment Manager database information. SAS Environment Manager is a default Postgres database provided by SAS that stores collected server metrics. Click **Next**.

- In **Database User**, enter a user ID for accessing the SAS Environment Manager database.
- In **Database User Password**, enter a valid password for the user ID associated with the database account.

**Note:** Record this password because you will need it in the future.

- In **Confirm Password**, re-enter the password.
- In **Database Encryption Passphrase**, enter a valid passphrase key for encrypting and decrypting the SAS Environment Manager database user password.
  
  The key must be at least eight characters long and can contain letters and numbers only.

**Note:** Record this passphrase because you will need it in the future.

- In **Confirm Database Encryption Passphrase**, re-enter the passphrase key. Click **Next**.

SAS Visual Analytics Transport Service: Whitelist Mobile Devices
Specify whether to enforce a whitelist for SAS Visual Analytics Apps, and click **Next**.

- Select **Enforce whitelist for mobile devices** to use a whitelist to control access to SAS Visual Analytics Apps.

  A deployment enforces either the blacklist or the whitelist. If the whitelist is not selected to be enforced, the blacklist is enforced by default. If the whitelist is enforced, only devices that are on the whitelist can use SAS Visual Analytics Apps. If the blacklist is enforced, any device that is not on the blacklist can use SAS Visual Analytics Apps. Although only one list is enforced, you can make changes to both lists.

  For more information, see “Enable or Prevent Access by Using the Whitelist and Blacklist” in *SAS Intelligence Platform: Middle-Tier Administration Guide*.

SAS Visual Analytics Admin: Context Root
Specify the context root. Click **Next**.

- In **Context Root for SAS Visual Analytics Admin**, enter the context root.

  The form of the URL for SAS Visual Analytics Administrator is `http://machine:port/SASVisualAnalyticsAdministrator`. Although the machine and port are configured elsewhere and they typically apply to the web container as a whole, the `SASVisualAnalyticsAdministrator` portion is the context root, and you can change it (within the constraints of URL rules).
SAS Visual Analytics Hyperlink Service: Context Root
Specify the context root. Click **Next**.

- In **Context Root for SAS Visual Analytics Hyperlink Service**, enter the context root.

  The form of the URL for SAS Visual Analytics Service Hyperlink Service is `http://machine:port/SASVisualAnalytics`. Although the machine and port are configured elsewhere and typically apply to the web container as a whole, the `SASVisualAnalytics` portion is the context root, and you can change it (within the constraints of URL rules).

SAS Deployment Backup and Recovery Tool Enable Central Vault
Indicate whether to use a central backup vault for the SAS Deployment Backup and Recovery Tool. Click **Next**.

- Select **Enable central vault storage of backup files** to enable central storage of backup files by specifying a network-accessible vault directory.

**CAUTION:**
If your SAS deployment is not current SAS 9.4M2, then a central backup vault directory is required if your middle-tier environment includes a clustered SAS Content Server.

The default value for the central backup vault directory is kept blank. The feature of storing backup files at a central location is disabled by default.

To enable this feature, provide a directory shared across all the tiers. The default retention period for a backup is 30 days. If the configuration that you are performing requires a backup at a central shared location and you want to change the retention period, change the **Retention period**.

(On Windows only) Provide a valid operating system (external) user account and password to execute commands using the SAS Deployment Agent. This user account must have the following characteristics:

- It must be an external account that has access to and sufficient privileges for each host machine to be included in the backup.
- It must be known to the host machine that contains the central vault.
- It must have Read and Write access to the following directories:
  - the central vault directory
  - `SAS-configuration-directory/SASMeta/Metadata`

For more information, see “Using the Deployment Backup and Recovery Tool” in *SAS Intelligence Platform: System Administration Guide*.

34. Deployment Summary
Review software that the deployment wizard plans to install and configure.

- When you see the Deployment Summary page, the deployment wizard has finished collecting installation and configuration input. This is the last opportunity to go back and change any information that you have provided in previous pages before the wizard begins writing to your system.

Make one of the following choices:

- Click **Start** to begin installing SAS files and writing the configuration to the current machine.

The deployment wizard launches the installation and configuration process and provides an ongoing status update.
• Click **Back** to navigate to previous pages to change installation and configuration information.

• Click **Cancel** to terminate the deployment wizard session. Note that you will lose installation and configuration information previously entered.

**CAUTION:**

If you encounter a situation in which the deployment wizard reports a configuration failure, leave the error message displayed. Do not continue. Consult additional documentation and, if necessary, contact SAS Technical Support. Moving past an error most often results in having to delete your deployment and start over.

On UNIX, when you are installing the server tier, you are instructed to run a script as root. As the message in the installation program explains, certain SAS products and features use functionality that requires SAS to check user ID authentication and file access authorizations. This, in turn, necessitates that certain files within your SAS installation have setuid permissions and be owned by root.

Your credentials are temporarily stored in your Windows Registry using the Windows automatic logon functionality. In rare circumstances, it is possible that those values will remain in your Windows Registry after they are used. This poses a potential security risk.

For more information about this functionality including any risks, see Microsoft documentation about security and automatic logons. You should weigh the risk of convenience of automatic logon after restart against the security policies in place at your site.

35. Deployment Complete

The Deployment Complete page displays the configuration results for each SAS product.

• A green check mark next to every item on this page indicates that your deployment completed successfully. Click **Next**.
• If you received errors during your deployment, then contact SAS Technical Support at mailto:support@sas.com. Attach to your email the files listed in “Review SAS Deployment Tool Documents, Reports, and Logs” on page 156.

36. Additional Resources

Use the links displayed to review more information about your SAS deployment.

• Click Finish to close the SAS Deployment Wizard.

37. Configuration Guidelines and Details
Review configuration guidelines and details for post-deployment steps. Click Next.

- To complete your SAS deployment, review the configuration guidelines and details and perform the steps listed.

  Configuration Guidelines and Details (the Instructions.html file) is automatically generated by the deployment wizard. It has post-installation steps specific to your SAS order that you must perform.

- The SAS Deployment Wizard writes the Configuration Guidelines and Details (the Instructions.html file) to the Documents directory under the SAS configuration path. For example:

  - UNIX and z/OS:
    `/opt/SAS/Lev1/Documents/Instructions.html`
  - Windows:
    `C:\SAS\Config\Lev1\Documents\Instructions.html`

38. For multi-machine deployments, back up your metadata repository and your SAS configuration directory before you run the SAS Deployment Wizard on the next machine called for by your deployment plan. For more information, see “About the Metadata Server Backup Facility” in SAS Intelligence Platform: System Administration Guide.

39. If you are deploying a middle-tier machine and opted not to automatically deploy your SAS web applications, then you must manually deploy them. For more information, go to the Third-Party Software Downloads site at http://support.sas.com/resources/thirdpartysupport/v94/appservers/index.html and select the product name of your web application server.

40. When you have completed any manual configuration tasks, and you have made the necessary backups, repeat the steps listed in this topic on each machine defined in your deployment plan.
41. When you are finished installing and configuring SAS on each machine called for in your deployment plan, back up your deployment.

For more information, see “About the Deployment Backup and Recovery Tool” in SAS Intelligence Platform: System Administration Guide.

42. Be sure to restart any servers that you stopped for purposes of creating a backup, and then proceed to the next section.

Validate the SAS 9.4 Servers

There are a few simple steps required to confirm that the various SAS servers that you have deployed are running properly. The following table summarizes server validation information:

<table>
<thead>
<tr>
<th>Server</th>
<th>Validation Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS Metadata Server</td>
<td>You can successfully log in using SAS Management Console.</td>
</tr>
<tr>
<td>Object Spawner</td>
<td>If either the Stored Process Server or one of the Workspace Servers validates, then the Object Spawner is running.</td>
</tr>
<tr>
<td>OLAP Server</td>
<td>In SAS Management Console, right-click, and select Validate. The default path is: Server Manager ⇒ SASApp ⇒ Logical OLAP Server.</td>
</tr>
<tr>
<td>Pooled Workspace Server</td>
<td>In SAS Management Console, right-click, and select Validate. The default path is: Server Manager ⇒ SASApp ⇒ Logical Pooled Workspace Server.</td>
</tr>
<tr>
<td>Workspace Server</td>
<td>In SAS Management Console, right-click, and select Validate. Enter external account credentials. The default path is: Server Manager ⇒ SASApp ⇒ Logical Workspace Server.</td>
</tr>
<tr>
<td>SAS DATA Step Batch Server</td>
<td>You can successfully launch SAS when running the sasbatch script (Windows and UNIX). On z/OS, use the Schedule Manager’s Deploy SAS DATA Step Program to browse the appserver_autoexec_usermods.sas file created in the server context.</td>
</tr>
</tbody>
</table>
You can successfully launch the grid test program, available at http://support.sas.com/rnd/scalability/grid/gridfunc.html#testprog. For more information, see “Verifying SAS Job Execution” in Grid Computing in SAS.

* Use the server context name that you entered during the deployment. In the table, the server context name is SASApp.

Validation is intended for an out-of-the-box, basic deployment. For more complex server configurations, refer to the appropriate SAS documentation for the server in question.

To validate the SAS server tier that has been deployed using the SAS Deployment Wizard, follow these steps:

1. Log on to the machine hosting one or more SAS servers.
2. Start SAS Management Console using the command for the appropriate operating system.
   - Windows:
     Start SAS SAS Management Console 9.4
   - UNIX:
     Enter the following command:
     SAS-installation-directory/sasmc
     For example:
     /opt/sas/SASManagementConsole/9.4/sasmc
   - z/OS:
     Use a Windows or UNIX machine on which SAS Management Console is installed. Connect to the z/OS machine(s) where the SAS 9.4 server tier is running.
3. Log on to the SAS Metadata Server using valid credentials such as the SAS Administrator.
4. In SAS Management Console, on the Plug-ins tab, expand the Server Manager node.
5. Expand the SAS Application Server node. (The default name is SASApp.)
6. Select the server that you want to validate, such as the SASApp - Logical OLAP Server.
7. Right-click, and select Validate.
   You should see the following message: Validation Successful!
8. Repeat steps 6 and 7 for the other SAS servers:
   - Pooled Workspace Server
   - Stored Process Server
   - Workspace Server
9. When validating the SAS Workspace Server, if you are prompted for credentials, enter the credentials for the SAS Spawned Servers Account (sassrv). Alternatively, you can enter a user ID and password that meet all of these requirements:

<table>
<thead>
<tr>
<th>Server</th>
<th>Validation Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grid Server</td>
<td>You can successfully launch the grid test program, available at <a href="http://support.sas.com/rnd/scalability/grid/gridfunc.html#testprog">http://support.sas.com/rnd/scalability/grid/gridfunc.html#testprog</a>. For more information, see “Verifying SAS Job Execution” in Grid Computing in SAS.</td>
</tr>
</tbody>
</table>
The account is known to the host of the SAS Workspace Server.
(An ID that ends in @saspw does not meet this requirement.)

The account has the Windows right Log on as a batch job (if the server is on Windows).

The account has a corresponding metadata identity.

10. To validate the SAS DATA Step Batch server on Windows and UNIX, SAS should successfully launch when you run the following command, appropriate for the server host operating system:

Windows:

Start menu ⇨ Run ⇨ SAS-configuration-directory\SASApp\BatchServer
\sasbatch.bat

For example:

Start menu ⇨ Run ⇨ C:\SAS\AllServers\Lev1\SASApp\BatchServer
\sasbatch.bat

UNIX:

Enter the following command:

SAS-configuration-directory/\SASApp/BatchServer/sasbatch.sh

For example:

/opt/sas/AllServers/Lev1/SASApp/BatchServer/sasbatch.sh

11. To validate the SAS DATA Step Batch Server on z/OS, use the Schedule Manager’s Deploy SAS DATA Step Program to browse the appserver_autoexec_usermods.sas file created in the AppServer context. When the JCL pane comes up and contains JCL, the deployment of the SAS DATA Step Batch server is successful.

a. From SAS Management Console, right-click the Schedule Manager plug-in (on the Plug-ins tab), and choose Deploy SAS DATA Step Program.

b. Click Browse, and navigate to the appserver_autoexec_usermods.sas file under a server context such as SASApp (for example, SAS-configuration-directory/\SASApp).

c. You should see JCL in the bottom list box.

12. To verify that your Grid Servers are operational, follow the steps in “Verifying SAS Job Execution” in Grid Computing in SAS.

13. Repeat these steps on each machine in your deployment plan on which you have deployed one or more SAS servers.

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**About SAS Deployment Tester**

SAS 9.4 provides a SAS Management Console plug-in that you can use to test your SAS deployment. For more information, see the SAS Management Console Help for the SAS Deployment Tester and “Using the Deployment Tester” in *SAS Intelligence Platform: System Administration Guide.*
Overview of Automating the SAS Installation on Multiple Machines

The following topics are contained in this section:

- “Overview of Automating the SAS Installation on Multiple Machines” on page 122
- “Recording a SAS Deployment Wizard Response File” on page 123
- “Playing Back a SAS Deployment Wizard Response File” on page 124
- “Verifying the Playback Install” on page 127
- “Monitoring the SAS Deployment Wizard during Playback” on page 128
- “More about Monitoring the SAS Deployment Wizard on UNIX and z/OS” on page 128

Overview of Automating the SAS Installation on Multiple Machines

The SAS Deployment Wizard provides a record and playback feature that enables you to automate a SAS installation across multiple machines. This feature is designed for large-scale enterprise deployments where SAS 9.4 clients need to be deployed across many machines. Using the record and playback feature prevents users from having to manually provide input on every page every time the SAS Deployment Wizard is run on a machine.

To run the deployment wizard on operating systems that do not have windowing systems, see the [http://support.sas.com/documentation/installcenter/en/ikdeploywizug/66034/PDF/default/user.pdf](http://support.sas.com/documentation/installcenter/en/ikdeploywizug/66034/PDF/default/user.pdf).

The SAS Deployment Wizard can be run in one of the three playback modes. Each mode requires you to launch the wizard from the command line with a particular option. After the wizard finishes, you review the log file to verify that the installation completed successfully. Users can choose among three playback modes when playing back a SAS Deployment Wizard response file.

**Note:** This same record and playback feature works for the SAS Deployment Manager to automate configuration actions across multiple machines in a SAS deployment.

**CAUTION:**

If you choose to use the SAS Deployment Manager’s record and playback feature to perform a task that involves passwords, passwords are written to the response file. For greater security, delete the response file (or remove the passwords from the response file) when you are finished. A response file exists only if you use the record and playback feature instead of completing the task manually as documented in the preceding steps.

The following summarizes the SAS Deployment Wizard record and playback process:

1. Create a response file.
   
   Run the SAS Deployment Wizard once in record mode to create a response file. SAS is not installed or configured; the only output is a response file.
See “Recording a SAS Deployment Wizard Response File” on page 123.

2. Play back the response file to install SAS.
   Run the SAS Deployment Wizard to install and configure SAS using the values you previously recorded in the response file.

3. Verify that the installation completed successfully.
   Check the SAS Deployment Wizard log file for the presence of any errors.
   See “Verifying the Playback Install” on page 127.

**Recording a SAS Deployment Wizard Response File**

To use the SAS Deployment Wizard in playback mode, your first step is to create a response file. A response file is a text file that contains values for the SAS Deployment Wizard to use to install and configure SAS when running in one of the three playback modes. You create a response file by running the SAS Deployment Wizard in record mode. While in record mode, you interact with the SAS Deployment Wizard as if you are installing and configuring SAS. However, the SAS Deployment Wizard does not install or configure any software while in record mode. The only output is the response file.

The SAS Deployment Wizard stores any passwords that you choose to record in the response file using a fixed-key, 32-bit proprietary encryption algorithm.

The SAS Deployment Wizard resides at the root of the SAS Software Depot directory or in the root of the SAS media that you are installing from. The following command runs the SAS Deployment Wizard in record mode:

- **Windows:**
  `setup.exe -record`

- **UNIX:**
  `setup.sh -record`

- **z/OS:**
  `setup.rexx -record`

*Note:* Starting with SAS 9.4M2, the deployment wizard automatically records your responses, regardless of whether you run the wizard with the `-record` option. The record of your wizard inputs is written to a file called `ResponseRecord_yyyymm-dd-hh.mm.ss.log` in the following location:

- Windows: `C:\Users\SAS-Installer\AppData\Local\SAS\SASDeploymentWizard` (Windows) and `home-directory/.SASAppData/SASDeploymentWizard` (UNIX).

To run the SAS Deployment Wizard, you must be a user who is known to the target machine and who will be available for the long term (to perform future SAS maintenance). On Windows, the Installer user should be a member of the Administrators group. On UNIX, use the same account on all machines. For more information, see “Required External User Accounts for SAS” on page 10.

*Note:* While in quiet mode, if the deployment wizard encounters errors or missing parameters, it halts the SAS deployment.
By default, the SAS Deployment Wizard names the response file `sdwresponse.properties` and writes the file to the current user’s home directory. For example, the default path and filename on Windows is as follows:

```
C:\Documents and Settings\current-user\sdwresponse.properties
```

To specify a response file that does not use the default filename, use the `-responsefile` option. For example, on Windows, you might enter a command similar to this:

```
setup.exe -record -responsefile "C:\Program Files\SAS\response.properties"
```

If you want, you can force the wizard to deploy SAS during recording mode by using the `-deploy` option. For example, on Windows, you might enter a command similar to this:

```
setup.exe -record -deploy -responsefile "C:\Program Files\SAS\response.properties"
```

For information about verifying your deployment, see “Verifying the Playback Install” on page 127.

**TIP** You can use an existing response file as a source for creating a new response file. To do this, use the following command: `setup.exe -inputresponsefile response-file`.

---

**Playing Back a SAS Deployment Wizard Response File**

**Overview of Playing Back a SAS Deployment Wizard Response File**

There are three playback modes that give users varying levels of automation with the SAS Deployment Wizard.

**Table 6.4 Playback Modes for the SAS Deployment Wizard**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Level of Automation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quiet</td>
<td>High</td>
<td>No visual feedback from the SAS Deployment Wizard.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See “Installing SAS in Quiet Mode” on page 125.</td>
</tr>
<tr>
<td>Partial prompt</td>
<td>Medium</td>
<td>Users see only SAS Deployment Wizard pages for values not contained in the response file.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See “Installing SAS in Partial Prompt Mode” on page 126.</td>
</tr>
<tr>
<td>Full prompt</td>
<td>Low</td>
<td>Users see all SAS Deployment Wizard pages with response file values supplied. Users can confirm these values or change them.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See “Installing SAS in Full Prompt Mode” on page 127.</td>
</tr>
</tbody>
</table>

**Best Practices for Response File Playback**

When playing back a SAS Deployment Wizard response file, keep these best practices in mind.

- Use response files on other machines with caution.
Remember that recording a deployment captures responses that represent the machine on which you have recorded the deployment. Machines are not identical. Therefore, SAS recommends that response files be used on other machines with caution.

- Do not use response files from other SAS orders.

New deployment options can be introduced with updates to the SAS order. A response file from an earlier SAS order does not have data for these new deployment options. For this reason, SAS recommends that response files should be used only for software in the same order. Using a response file from one order while deploying another order might result in unintended discrepancies that might be difficult to troubleshoot.

- Use the same configuration prompting level.

When using playback, the deployment wizard should use the same level of configuration prompting as was used in record mode. Manual revision of the response file should be attempted only with extreme caution by users with experience with SAS configuration or with the aid of a SAS consultant or SAS Technical Support.

Installing SAS in Quiet Mode

The SAS Deployment Wizard gives you flexibility in how you automate the SAS installation. The highest level of automated installation is running the SAS Deployment Wizard in quiet mode. In quiet mode, there is no user interface in which you provide installation inputs. The SAS Deployment Wizard uses inputs that you have already provided in the form of a response file to determine how to install and to configure SAS.

The following command runs the SAS Deployment Wizard in quiet playback mode:

- Windows:
  `setup.exe -quiet -wait`

- UNIX:
  `setup.sh -quiet`

- z/OS:
  `setup.rexx -quiet -wait`

Note: For information about `-wait`, see “Monitoring the SAS Deployment Wizard during Playback” on page 128.

To run the SAS Deployment Wizard, you must be a user who is known to the target machine and who will be available for the long term (to perform future maintenance). On Windows, the Installer user should be a member of the Administrators group. On UNIX, use the same account on all machines. For more information, see “Required External User Accounts for SAS” on page 10.

When running in quiet mode, the SAS Deployment Wizard’s action is to look for its response file by default in the current user’s home directory. For example, the default path and filename on Windows is as follows:

`C:\Documents and Settings\current-user\sdwresponse.properties`

To specify a response file that does not use the default name, use the `-responsefile absolute-pathname` option. For example, on Windows, you might enter a command similar to this:
setup.exe -quiet -responsefile "C:\Program Files\SAS\response.properties" -restartdomain domain-name -restartuserid user-name -restartpassword password

For Windows machines, in the event that the machine must be rebooted, use the restart options to avoid having to manually log back on to the machine. For example, you might enter a command similar to this:

setup.exe -quiet -responsefile "C:\Program Files\SAS\response.properties"

See the following topics for more information:

- “Verifying the Playback Install” on page 127
- “Monitoring the SAS Deployment Wizard during Playback” on page 128

Installing SAS in Partial Prompt Mode

The SAS Deployment Wizard gives you flexibility with how you automate the SAS installation. You can fully automate the SAS installation (quiet mode), or you can choose certain parts of the installation to automate (partial prompt mode).

When you run the SAS Deployment Wizard in partial prompt mode, the user sees only those wizard pages for which there are no response file values. There might be situations where it is permissible to automate most of the installation inputs, but it is necessary to prompt for certain sensitive information. For example, storing user account credentials—even in an encrypted form—might violate a site’s corporate security policy. It would require the user to interact with the SAS Deployment Wizard for those pages where user account credentials are entered.

The SAS Deployment Wizard resides at the root of the SAS Software Depot directory or in the root of the SAS media that you are installing from. The following command runs the SAS Deployment Wizard in partial prompt playback mode:

- Windows:
  setup.exe -partialprompt
- UNIX:
  setup.sh -partialprompt
- z/OS:
  setup.rexx -partialprompt

To run the SAS Deployment Wizard, you must be a user who is known to the target machine and who will be available for the long term (to perform future maintenance). On Windows, the Installer user should be a member of the Administrators group. On UNIX, use the same account on all machines. For more information, see “Required External User Accounts for SAS” on page 10.

When running in partial prompt mode, the SAS Deployment Wizard’s action is to look for its response file by default in the current user’s home directory. For example, the default path and filename on Windows is as follows:

C:\Documents and Settings\current-user\sdwresponse.properties

To specify a response file that does not use the default name, use the -responsefile option. For example, on Windows, you might enter a command similar to this:

setup.exe -partialprompt -responsefile "C:\Program Files\SAS\response.properties"

For more information, see “Verifying the Playback Install” on page 127.
Installing SAS in Full Prompt Mode

There are three levels of automation from which you can choose when running the SAS Deployment Wizard in playback mode: quiet, partial prompt, and full prompt. Full prompt mode is the least automated of the three modes. When running in full prompt mode, the SAS Deployment Wizard requires user confirmation for all of its pages. However, in full prompt mode, the user is prompted with default values that are stored in the response file.

The SAS Deployment Wizard resides at the root of the SAS Software Depot directory or in the root of the SAS media that you are installing from. The following command runs the SAS Deployment Wizard in full prompt playback mode:

- Windows:
  ```
  setup.exe -responsefile absolute-pathname
  ```
- UNIX:
  ```
  setup.sh -responsefile absolute-pathname
  ```
- z/OS:
  ```
  setup.rexx -responsefile absolute-pathname
  ```

To run the SAS Deployment Wizard, you must be a user who is known to the target machine and who will be available for the long term (to perform future maintenance). On Windows, the Installer user should be a member of the Administrators group. On UNIX, use the same account on all machines. For more information, see “Required External User Accounts for SAS” on page 10.

When running in full prompt mode, the SAS Deployment Wizard expects you to specify a path and filename to a valid response file. For example, on Windows, enter the following command:

```
setup.exe -responsefile "C:\Program Files\SAS\response.properties"
```

For more information, see “Verifying the Playback Install” on page 127.

Verifying the Playback Install

When running in quiet mode, the SAS Deployment Wizard logs the following message after a successful completion:

```
Deployment completed successfully
```

If the SAS Deployment Wizard encounters incorrect or missing input in the response file, it records a message in its log file and returns an error code of -1. The SAS Deployment Wizard log file resides in the following location:

- Windows:
  ```
  C:\Documents and Settings\current-user\Local Settings\Application Data\SAS\SAS Deployment Wizard\SDW.log
  ```
- UNIX and z/OS:
  ```
  $HOME/.SASAppData/SASDeploymentWizard/SDW_<year-month-day-hour:minutes:seconds>\.log
  ```

Use the `-loglevel n` option to control the amount of information written by the SAS Deployment Wizard to its log. A change in the logging level is in effect for the current SAS Deployment Wizard invocation only. If you do not specify a log level, then the wizard uses the default (zero). `n` can be one of the following three values:
0
  (default) specifies the least amount of information written to the log. Zero is acceptable for most SAS Deployment Wizard sessions.

1
  specifies a medium amount of information written to the log. This value is generally used when working with SAS Technical Support to troubleshoot deployment issues.

2
  specifies the greatest amount of information written to the log and should not be specified except when instructed to by SAS Technical Support.

For example, on Windows, to increase the SAS Deployment Wizard logging level, you might enter a command similar to this:

```bash
setup.exe -partialprompt -responsefile "C:\Program Files\SAS\response.properties" -loglevel 1
```

**Monitoring the SAS Deployment Wizard during Playback**

Running the SAS Deployment Wizard in quiet mode provides the sought-after effect of suppressing the wizard’s user interface. One drawback with quiet mode is not being able to see the interface, which enables you to monitor the install and to see whether any errors occur. To address this concern, you can use the Task Manager on Windows or periodically issue the `ps` command on UNIX and z/OS to track whether the SAS Deployment Wizard is running.

On Windows, specify the `-wait` option when invoking the SAS Deployment Wizard in quiet mode to cause setup.exe to display and remain in the Windows Task Manager process list.

For example:

```bash
setup.exe -quiet -wait -responsefile "C:\Program Files\SAS\response.properties"
```

If you did not use `-wait`, monitor the process named `java.exe`.

**Note:** Use of network management software (such as SMS or Tivoli) might require you to use the `-wait` option when running the SAS Deployment Wizard in quiet mode in order for the software to determine when the SAS Deployment Wizard finishes executing. Refer to your network management platform documentation for more information.

On UNIX and z/OS, as with most processes, you issue the `ps` command to monitor the SAS Deployment Wizard running in quiet mode. For more information, see “More about Monitoring the SAS Deployment Wizard on UNIX and z/OS” on page 128.

**More about Monitoring the SAS Deployment Wizard on UNIX and z/OS**

Remember that output from a `ps` command can be misleading because the process name returned is not always named `setup.sh`. The name might differ because the actual script that the SAS Deployment Wizard is running at any given time varies. However, the process ID remains the same.

For example, if you were to run the SAS Deployment Wizard and immediately issue a `ps` command (before the language dialog box is displayed), you would see output similar to this:

```
31762 pts/2 S 0:00 /bin/sh /depot/setup.sh
```
Note that the shell, `/bin/sh`, runs the initial script, `/depot/setup.sh`. The shell is the parent process, and, in this example, has a process ID of 31762. When `setup.sh` is finished executing, it passes control to the script, `deploywiz.sh`. If you were to look at the process list while the SAS Deployment Wizard is running, you would see something similar to the following:

```
31762 pts/2 S 0:00 /bin/sh/tmp/_setup31762/products/
    deploywiz__9220__prt__xx__sp0__1/deploywiz.sh -
    startuplocation /depot -templocation /tmp/_setup31762
```

The shell `/bin/sh` is still running and retains the same process ID. However, this shell is running a different script now, `deploywiz.sh`. 
Overview of Administration Tasks

Before you perform the administration tasks that are outlined in this chapter, you should have successfully completed the following tasks:
• Use the SAS Deployment Wizard to install and configure your software on each machine in your environment.

• Complete the post-installation tasks that are described in your Instructions.html file, which is located in the Documents subdirectory of your configuration directory. These tasks include performing manual configuration steps (if applicable), validating your SAS servers, validating your web applications, and backing up your system.

After the SAS Intelligence Platform has been installed, configured, and validated, you will have a functional system. You can now begin performing administration tasks that are necessary to fully implement the SAS Intelligence Platform in your environment. These include the following categories of tasks:

• “First-Priority Setup Tasks” that are necessary to protect the integrity of your system. You should perform these tasks first, as soon as possible after you have completed your installation.

• “Standard Setup Tasks” that enable the users in your organization to begin using SAS Intelligence Platform client applications to access and analyze your data.

• “Optional Setup Tasks” that you might want to perform to address specific requirements in your environment.

• “Ongoing System Administration Tasks” to keep the SAS Intelligence Platform operational.

---

**First-Priority Setup Tasks**

**Summary of First-Priority Setup Tasks**

The following tasks are necessary to protect the integrity of your system. Complete these steps as soon as possible after installation, before you complete any of the other tasks that are outlined in this chapter.

**Table 7.1 First-Priority Setup Tasks**

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check for and apply SAS hot fixes</td>
<td>A best practice is to check for and apply SAS software hot fixes immediately after deployment and before putting your SAS system into production. Doing so ensures that you have the latest important SAS fixes relevant to your site. For more information, see “Installing a Hot Fix” in SAS Guide to Software Updates and Product Changes.</td>
</tr>
</tbody>
</table>
Task | Description
---|---
Secure the SAS configuration on each server machine. | For a secure deployment, the configuration directory on each server machine must be protected by operating system controls. These controls will prevent inappropriate access to repository data sets, server scripts, server logs, and configuration files.

On Windows systems, all configuration directories, files, and scripts are owned by the user who performs the installation. You must update the permissions as shown in “Recommended Operating System Protections for Windows Machines” on page 133. These recommendations assume that your SAS servers and spawners run as services under the Local System account.

On UNIX and z/OS systems, the SAS Deployment Wizard automatically applies the appropriate permissions. The default permissions are shown in “Default Operating System Protections for UNIX and z/OS Machines” on page 136.

Establish a formal, regularly scheduled backup process. | Establish a formal, regularly scheduled backup process that includes your metadata repositories as well as the associated physical files.

SAS includes a server-based facility that performs metadata server backups automatically on a scheduled basis. By default, these backups are scheduled to run at 1:00 a.m. every day except Sunday. As a best practice, you should modify your backup configuration to specify a storage device other than the device that is used to store the metadata repositories and the server configuration files. Be sure to include this backup location in your regular system backups. See “Backing Up and Recovering the SAS Metadata Server” in SAS Intelligence Platform: System Administration Guide.

It is important to also back up the physical data that is associated with the metadata so that related information will be synchronized if a restore becomes necessary. The Deployment Backup and Recovery tool, new with SAS 9.4, provides an integrated method for backing up and recovering SAS content across multiple tiers and machines. The backup includes the metadata server as well as resources such as the SAS Content Server and server configuration files. If this tool has been configured, scheduled backups are run each Sunday at 1:00 a.m. by default. See “Using the Deployment Backup and Recovery Tool” in SAS Intelligence Platform: System Administration Guide.

For guidance in setting up a backup process, see:

- “About Backing Up and Restoring Your SAS Content” in SAS Intelligence Platform: System Administration Guide
- “Setting Up Your Backups” in SAS Intelligence Platform: System Administration Guide

### Recommended Operating System Protections for Windows Machines

On Windows server machines, we recommend that you apply the following operating system protections to your configuration directory. All of these directories are located in `SAS-configuration-directory\Lev1`.

#### Table 7.2 Recommended Operating System Protections on Windows

<table>
<thead>
<tr>
<th>Directories</th>
<th>Users</th>
<th>Recommended Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS-configuration-directory</td>
<td>SYSTEM and Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td>All other users</td>
<td>List Folder Contents, Read</td>
</tr>
<tr>
<td>Directories</td>
<td>Users</td>
<td>Recommended Permissions</td>
</tr>
<tr>
<td>-------------</td>
<td>-------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>SAS-configuration-directory\Lev1</td>
<td>SYSTEM and Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td>SAS Spawned Servers (sassrv)</td>
<td>On Windows Vista, Windows 7, and Windows Server 2008: Special Permissions to read and execute On Windows XP: Read and Execute</td>
</tr>
<tr>
<td></td>
<td>All other users</td>
<td>List Folder Contents, Read</td>
</tr>
<tr>
<td>SASMeta\MetadataServer</td>
<td>SYSTEM and Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td>SAS Metadata Server: Service Login Account (for example, sassvlgn)</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remove all other users and groups</td>
</tr>
<tr>
<td>SASMeta\MetadataServer\Backups (or other metadata server backup location)</td>
<td>SAS Deployment Backup and Recovery Tool User Account, also referred to as the backup user (for example, sasbackup)</td>
<td>Read</td>
</tr>
<tr>
<td>Lev1\SASApp</td>
<td>SYSTEM and Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td>SAS Spawned Servers (sassrv)</td>
<td>Windows Vista, Windows 7, and Windows Server 2008 only: Special Permissions to read and execute</td>
</tr>
<tr>
<td></td>
<td>All other users</td>
<td>List Folder Contents, Read</td>
</tr>
<tr>
<td>Lev1 subdirectories: Documents, ReportBatch, SASMeta, Utilities, Web</td>
<td>SYSTEM and Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td>All other users</td>
<td>List Folder Contents, Read</td>
</tr>
<tr>
<td>Lev1 subdirectories:</td>
<td>SYSTEM and Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td>• ConnectSpawner</td>
<td></td>
<td>Remove all other users and groups</td>
</tr>
<tr>
<td>• Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• ObjectSpawner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• SASApp\OLAPServer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• ShareServer</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Directories

<table>
<thead>
<tr>
<th>SASApp subdirectories:</th>
<th>Users</th>
<th>Recommended Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PooledWorkspaceServer, StoredProcessServer</td>
<td>SYSTEM, Administrators</td>
<td>Full Control</td>
</tr>
<tr>
<td></td>
<td>SAS Spawned Servers (sassrv)</td>
<td>On Windows Vista, Windows 7, and Windows Server 2008 only: Read &amp; Execute, List Folder Contents, and Read</td>
</tr>
<tr>
<td></td>
<td>All other users</td>
<td>No access</td>
</tr>
<tr>
<td>PooledWorkspaceServer \Logs, StoredProcessServer\Logs</td>
<td>SYSTEM, Administrators, and SAS Spawned Servers (sassrv)</td>
<td>Full Control</td>
</tr>
<tr>
<td>SASApp subdirectories:</td>
<td>SYSTEM, Administrators, and SAS Spawned Servers (sassrv)</td>
<td>Full Control</td>
</tr>
<tr>
<td>ConnectServer\Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data\wrsdist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data\wrstemp</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PooledWorkspaceServer\sasuser</td>
<td></td>
<td></td>
</tr>
<tr>
<td>StoredProcessServer\sasuser</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WorkspaceServer\Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>sasv9_meta.cfg file</td>
<td>SYSTEM and Administrators</td>
<td>Read and Write Remove all other users and groups</td>
</tr>
</tbody>
</table>

* The SAS Deployment Wizard automatically sets these permissions for sassrv.
** On Windows, this account is required for metadata server clustering on Windows.
*** On Windows, this account is required when using a central vault for the Deployment Backup and Recovery Tool or when using metadata server clustering.

**Note:**

- These recommendations assume that your SAS servers and spawners run as services under the Local System account. If servers and spawners are run under a different account, then grant that account the permissions that are recommended for SYSTEM.
  
  For example, if the metadata server is run under the SAS Metadata Server: Service Login Account, then grant that account Full Control of `SASMeta \MetadataServer`, as shown in the preceding table.

- If you have configured metadata server clustering or middle-tier clustering, be sure to set the appropriate protections on all of the configured nodes.

- You might have selected the custom installation option to place all of your log files in a single directory. If you selected this option, then you will need to grant the SAS Spawned Servers (sassrv) user Full Control of the central log destination (for example, `SAS-configuration-directory\Lev1\Logs`).
• If users will be using SAS Enterprise Guide to create stored processes, then the SAS Spawned Servers (sassrv) account must have Write access to the directory in which stored processes will be stored.

• If you enable logging for a workspace server, then you will need to grant all users of the workspace server Full Control of the log directory. (See “Create a Log File for Workspace Server Troubleshooting” in *SAS Intelligence Platform: System Administration Guide*).

For details about the configuration directory structure, see “Overview of the Configuration Directory Structure” in *SAS Intelligence Platform: System Administration Guide*.

### Default Operating System Protections for UNIX and z/OS Machines

The following table shows the default operating system protections that are provided automatically for configuration directories on UNIX and z/OS machines. All of these directories are located in `SAS-configuration-directory/Lev1`.

**Table 7.3 Default Operating System Protections on UNIX and z/OS**

<table>
<thead>
<tr>
<th>Directories</th>
<th>Users</th>
<th>Default Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>SAS-configuration-directory</code></td>
<td>SAS Installer</td>
<td>Read, Write, and Execute</td>
</tr>
<tr>
<td><code>SAS-configuration-directory/Lev1</code></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lev1 subdirectories: Documents, ReportBatch, SASApp, SASMeta, Utilities, Web</td>
<td>SAS Installer</td>
<td>Read, Write, and Execute</td>
</tr>
<tr>
<td></td>
<td>All other users</td>
<td>Read and Execute</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lev1 subdirectories:</td>
<td>SAS Installer</td>
<td>Read, Write, and Execute</td>
</tr>
<tr>
<td>• ConnectSpawner</td>
<td>All other users</td>
<td>No access</td>
</tr>
<tr>
<td>• Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• ObjectSpawner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• SASApp/OLAPServer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• SASMeta/MetadataServer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• ShareServer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SASApp subdirectories : PooledWorkspaceServer, StoredProcessServer</td>
<td>SAS Installer</td>
<td>Read, Write, and Execute</td>
</tr>
<tr>
<td></td>
<td>sas group</td>
<td>Read and Execute</td>
</tr>
<tr>
<td>SASApp subdirectories :</td>
<td>SAS Installer</td>
<td>Read, Write, and Execute</td>
</tr>
<tr>
<td>• ConnectServer/Logs</td>
<td>sas group</td>
<td>Read and Execute</td>
</tr>
<tr>
<td>• Data/wrsdist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Data/wrstemp</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• PooledWorkspaceServer/Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• PooledWorkspaceServer/sasuser</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• StoredProcessServer/Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• StoredProcessServer/sasuser</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• WorkspaceServer/Logs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• WorkspaceServer/Logs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Note:

- Make sure that the SAS Spawned Servers account (sassrv) is a member of the sas group, which has the necessary permissions to server configuration files and log directories.

- You might have selected the custom installation option to place all of your log files in a single directory. If you selected this option, then you will need to grant either the sas group or the SAS Spawned Servers (sassrv) user Read, Write, and Execute permission on the central log destination (for example, `SAS-configuration-directory/Lev1/Logs`).

- If users will be using SAS Enterprise Guide to create stored processes, then the SAS Spawned Servers (sassrv) account must have Write access to the directory in which stored processes will be stored.

- If you enable logging for a workspace server, then you will need to grant all users of the workspace server Read, Write, and Execute permission on the log directory. (See “Create a Log File for Workspace Server Troubleshooting” in *SAS Intelligence Platform: System Administration Guide*).

- For details about the configuration directory structure, see “Overview of the Configuration Directory Structure” in *SAS Intelligence Platform: System Administration Guide*.

### Standard Setup Tasks

The following administration tasks are essential to enable the users in your organization to begin using SAS Intelligence Platform client applications to access and analyze your data.

#### Table 7.4  Standard Setup Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add users and manage access.</td>
<td>Standard security setup activities include the following:</td>
</tr>
<tr>
<td></td>
<td>• creating SAS administrators and regular SAS users</td>
</tr>
<tr>
<td></td>
<td>• managing access to metadata, data, and application functionality</td>
</tr>
<tr>
<td></td>
<td>For details, see “Selected Tasks” in <em>SAS Intelligence Platform: Security Administration Guide</em>.</td>
</tr>
</tbody>
</table>
Establish connectivity to your data sources.

To enable the client applications in the SAS Intelligence Platform to access your data sources (including SAS data sets, third-party relational databases, and data from Enterprise Resource Planning systems), you must create metadata objects that represent your data. For example, to enable users to access data in a library of SAS data sets, you must define metadata objects that represent the SAS library and each of the tables in the library. For details, see “Connecting to Common Data Sources” in SAS Intelligence Platform: Data Administration Guide.

Set up your metadata folder structure.

SAS Intelligence Platform clients use a hierarchy of SAS folders to store metadata for content such as libraries, tables, OLAP schemas, jobs, information maps, and reports. The initial structure provides private folders for individual users and provides a separate area for shared data. Within these folders, you should create a customized folder structure that meets your specific needs. For details, see “Working with SAS Folders” in SAS Intelligence Platform: System Administration Guide.

Note: Be sure to secure access to the folders as described in the SAS Intelligence Platform: Security Administration Guide.

Optional Setup Tasks

It might be necessary for you to modify your initial configuration to meet specific requirements in your environment. Optional administration and configuration tasks include the following.

**Table 7.5  Optional Setup Tasks**

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install sas.servers as a boot script.</td>
<td>On UNIX machines, you can choose to install the sas.servers script as a boot script so that the SAS servers will start automatically when you start the machine. The comments in the sas.servers script contain installation instructions that are specific to your operating environment. For details, see “Using the sas.servers Script on UNIX or z/OS to Start or Stop All Servers” in SAS Intelligence Platform: System Administration Guide.</td>
</tr>
<tr>
<td>Optimize the performance of the metadata server.</td>
<td>To optimize the performance of the metadata server, you might want to adjust the maximum number of threads used by the server. See “Configuring the Number of Threads Used by the Metadata Server” in SAS Intelligence Platform: System Administration Guide. For other performance-related tasks, see “Managing Metadata Server Memory” in SAS Intelligence Platform: System Administration Guide.</td>
</tr>
</tbody>
</table>
Modify the configuration of your processing servers.

Here are some server configuration changes that you might want to make for performance optimization or other reasons:

- Define a cluster of load-balanced workspace servers in order to balance a load across workspace servers that you have installed on multiple hosts. This type of configuration is most useful when you have a large number of users (such as data integration specialists) using a workspace server for relatively long-running jobs. For details, see "Understanding Server Load Balancing" in SAS Intelligence Platform: Application Server Administration Guide.

- Modify load balancing or algorithms for stored process servers and pooled workspace servers. For details, see "Understanding the Load Balancing Algorithms" in SAS Intelligence Platform: Application Server Administration Guide.

- If your SAS server metadata contains characters other than those typically found in the English language, then you must start your SAS server with an ENCODING= or LOCALE= system option that accommodates those characters. For details, see “Encoding and Locale Information” in the SAS Intelligence Platform: Application Server Administration Guide.

- If you will be submitting large jobs (for example, JAVA GRAPH jobs) on z/OS servers, then you might need to specify a larger region size. For details, see “Managing Memory” in the SAS Companion for z/OS.

- If you want your BI output to always use the time zone of the server’s operating system, then you can specify the TIMEZONE system option in a restricted configuration file on the server tier. This option will prevent users from specifying different time zones. For details, see “TIMEZONE= System Option” and “Restricted Options” in the SAS System Options: Reference.

Optimize web application performance.

For information about configuring middle-tier components for better efficiency and performance, see the SAS Intelligence Platform: Middle-Tier Administration Guide.

Adjust server logging.

You can change your server configurations to obtain additional logging information for troubleshooting, performance management, or other purposes. For details, see “Administering Logging for SAS Servers” in SAS Intelligence Platform: System Administration Guide and SAS Logging: Configuration and Programming Reference.

Enable job and report scheduling.

To enable SAS scheduling features, you can install and configure scheduling software, configure operating system scheduling, or configure in-process scheduling. For details, see Scheduling in SAS.

Increase Java heap memory allocation for desktop applications.

To process large amounts of data, you might need to modify the Java heap memory allocation that is configured for SAS Management Console, SAS Data Integration Studio, SAS OLAP Cube Studio, SAS Information Map Studio, and SAS IT Resource Management. See “Managing the Java Heap Used by Desktop Applications” in SAS Intelligence Platform: Desktop Application Administration Guide.

Set up change management for SAS Data Integration Studio users.

If you want to implement change management for SAS Data Integration Studio, then you must set up project repositories and at least one change-managed folder. For details, see “Administering SAS Data Integration Studio” in SAS Intelligence Platform: Desktop Application Administration Guide.

Collect ARM log information for SAS Data Integration Studio batch jobs.

If you want to collect ARM log information for SAS Data Integration Studio jobs that are run on a batch basis, then you must enable logging for the batch server that executes the jobs. For details, see “Collecting ARM Log Information for SAS Data Integration Studio Jobs” in SAS Intelligence Platform: System Administration Guide.
Ongoing System Administration Tasks

The following table lists important system administration tasks that you need to perform on an ongoing basis to keep the SAS Intelligence Platform operational.

Table 7.6  Ongoing System Administration Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Documentation Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start, stop, pause, resume, and refresh the servers that are used in the system.</td>
<td>“Operating Your Servers” in SAS Intelligence Platform: System Administration Guide</td>
</tr>
<tr>
<td>Check the status of a server or of a metadata repository.</td>
<td>“Checking the Status of Servers” in SAS Intelligence Platform: System Administration Guide</td>
</tr>
<tr>
<td>Monitor the activity of servers.</td>
<td>“Monitoring the Activity of SAS Servers” in SAS Intelligence Platform: System Administration Guide</td>
</tr>
<tr>
<td>Create a new metadata repository.</td>
<td>“Managing SAS Metadata Repositories” in SAS Intelligence Platform: System Administration Guide</td>
</tr>
<tr>
<td>Promote individual metadata objects or groups of objects.</td>
<td>“Promotion Tools Overview” in SAS Intelligence Platform: System Administration Guide</td>
</tr>
</tbody>
</table>

Note: The preceding table includes only the tasks that are documented in this guide. Other important administration tasks are described in the following documents:

- SAS Intelligence Platform: Data Administration Guide.
- SAS Intelligence Platform: Application Server Administration Guide.
- SAS Intelligence Platform: Desktop Application Administration Guide.
- SAS Intelligence Platform: Middle-Tier Administration Guide.
- SAS Intelligence Platform: Web Application Administration Guide.
- Scheduling in SAS.
- SAS/SHARE User’s Guide.
To access these documents, go to [http://support.sas.com/94administration](http://support.sas.com/94administration).

Best Practices for Ensuring the Integrity of Your System

**Keep Necessary Documentation Available**

SAS administrators should keep the following documentation available for each environment:

- the operational document specific to your environment to assist in transferring information to new administrators or for vacation coverage
- an updated store of user IDs and passwords
- a complete log of changes and events that take place in the SAS environment. This log is helpful if issues are encountered. The following changes should be included in the log:
  - host name changes
  - updates
  - patches

**Start and Stop SAS Servers in the Correct Order**

It is critical that the SAS servers be started and stopped in the recommended order as documented in “Overview of Server Operation” in *SAS Intelligence Platform: System Administration Guide*. The SAS_lsm tool described in *Usage Note 58231: Utility that manages multi-tiered SAS services for Unix/Linux deployments* is one of the options to ensure that this recommendation is followed consistently.

**Back Up Your Environment**

Maintain a regular schedule of deployment backups, as described in “Using the Deployment Backup and Recovery Tool” in *SAS Intelligence Platform: System Administration Guide*.

Use operating system commands to back up your file system contents on a regular basis when server processes are stopped. Verify that your backup process is successful. Verify that you can restore from your backup.

Maintain a daily schedule of metadata server backups, as described in “Backing Up and Recovering the SAS Metadata Server” in *SAS Intelligence Platform: System Administration Guide*.

By default, the SAS Metadata Server retains backups for 7 days. If you have enough available storage in the backup location, it is recommended that you increase that setting to retain at least 30 days of metadata backups. This ensures that a valid backup is available if a metadata corruption issue is encountered. If there is insufficient storage available in the backup location to support this, it is also possible to store metadata backups at an alternative location. We also recommend performing a file system backup of the metadata backup location nightly to allow for the recovery of older backups.
were removed by the metadata server in accordance with your file system backup retention policy.

**Test Alert Email Configuration**

SAS Metadata Server automatically sends an email to the designated email address when specific errors occur. This enables the SAS administrator to take timely action to correct the issue.

To test the alert email:

1. Log on to SAS Management Console.
2. Expand Metadata Manager and right-click the active server.
3. Select Properties and click Send Test Message.
4. The settings for the alert email are in the omaconfig.xml and sasv9.cfg files that are located in the `<sas-config-dir>/SASMeta/MetadataServer` directory.

For more information, see Backup and Alert Notifications in *SAS Environment Manager 2.5 Administration: User’s Guide*.

**Regularly Assess Your Environment for Available Hot Fixes**

SAS makes hot fixes available for the customer to download and install. For further information, see the following resources:

- SAS Hot Fix Analysis, Download and Deployment Tool
- SAS Hot Fix Announcements Communities Page
- How to learn about hot fixes to SAS software

**Update SAS Licenses and SSL Certificates**

SAS licenses and SSL certificates must be updated before the expiration date.

**Monitor Your Environment for System Resource Limitations**

Based on the system resource limitations defined in the system requirements documentation, monitor your environment for available disk space, CPU, I/O, file descriptors, ulimits, and memory. Use system tools and the Environment Manager provided by SAS to monitor your server health and issue alerts as described in “Using SAS Environment Manager to Monitor SAS Servers” in *SAS Intelligence Platform: System Administration Guide*.

For Linux, see System Requirements for SAS 9.4 Foundation for Linux for x64.

For Windows, see System Requirements for SAS 9.4 Foundation for Microsoft Windows.

**Perform Regular Metadata Maintenance**

Perform regular maintenance of metadata as described in “Running the Metadata Analyze and Repair Tools” in *SAS Intelligence Platform: System Administration Guide*. 

Long-Running SAS Sessions

To monitor long-running SAS sessions:

1. Check for long-running SAS sessions that might be abandoned and are no longer connected to a user session or a batch process.

2. Check SAS Enterprise Guide sessions that are left running overnight by users. These can lock the SAS tables.

These sessions might interfere with the nightly backup processes. Both these tasks can be successfully scripted. Your SAS consultants can help you find and adapt such scripts in your environment.

Clean Up Abandoned SASWork Directories

The SAS Cleanwork Utility for UNIX or Windows can be used for this task.

- For the UNIX environment, see “SAS Usage Utilities: cleanwork” in SAS Companion for UNIX Environments.
- For the Windows environment, see “Cleanwork Utility” in SAS Companion for Windows.

Run Scripts to Archive Log Files

Compress and archive log files periodically to save disk space. If you have servers that need to be restarted in order to rotate their logs, schedule a daily task to restart each of them. Log files are essential for troubleshooting issues, so retain the archived log files for a period of time to ensure that they are not needed by SAS Technical Support.

SAS Visual Analytics Monitoring

If you have installed SAS Visual Analytics on your machine, monitor the Autoload feature to ensure that it is periodically refreshing the tables when SAS Visual Analytics is running.

Monitor the audit reports to review information about the usage of your SAS Visual Analytics environment.

SAS Grid Monitoring

If you have a grid environment, monitor the distribution of the interactive and batch workload to ensure that the health of your grid is good. For further guidance, see Introduction to SAS Grid Computing.

Maintenance of the Shared Services Database

For more information about the shared services database, see the following resources:

- Tuning the PostgreSQL Data Server in SAS 9.4 Web Applications: Tuning for Performance and Scalability
- Monitoring Database Usage with SAS Environment Manager
Maintenance of the PostgreSQL Database

To perform regular maintenance on the PostgreSQL database, see Usage Note 32781: Performing periodic, required maintenance on the PostgreSQL database.

Allow Only the Metadata Server to Access Your Metadata Repositories

The MetadataRepositories and rposmgr subdirectories, which are located in the SAS configuration directory, are critical to the operation of your system. These data sets contain metadata that defines your servers, users, access levels, enterprise data sources, and data structures. They also contain metadata for resources that are created and used by SAS applications, including information maps, OLAP cubes, report definitions, stored process definitions, and jobs.

To safeguard the integrity of your system:

• Never move, delete, modify, or directly read the data sets in the MetadataRepositories and rposmgr directories. These data sets should be accessed only by metadata server processes.

• Do not place other files in these directories.

Use Best Practices for Working with SAS Folders

The folders that appear in the Folders tab of SAS Management Console are used by client applications to store business intelligence content and system information. Inappropriate renaming, deleting, or moving of these folders or their contents could cause client applications to malfunction.

When interacting with folders in SAS Management Console, be sure to follow the best practices that are provided in “Working with SAS Folders” in SAS Intelligence Platform: System Administration Guide. If you need to move or copy the contents of these folders, use the procedures that are provided in “Promotion Tools Overview” in SAS Intelligence Platform: System Administration Guide.

Use Usermods Files When Customizing Autoexec Files, Server Configuration Files, and Start-up Scripts

If you need to customize a configuration file, autoexec file, or start-up script for a SAS server, do not directly modify the file or script. Instead, add your customizations to the corresponding file that is named server-name_usermods.cfg, autoexec_usermods.sas, server-name_usermods.bat, or server-name_usermods.sh.

Use of these files prevents your customizations from being overwritten when a new SAS release is installed.

Be Aware of the SAS Virtualization Environment Policy

Do not make changes that affect the responsiveness of virtual machines that are running SAS servers. For more information, see SAS Product Support for Virtualization Environments.
Overview of Deploying SAS Web Parts for Microsoft SharePoint

What Is SAS Web Parts for Microsoft SharePoint?

Web parts are an integrated set of controls that enable you to provide customized, dynamic content on your website. By using Microsoft Windows SharePoint Server, you can add SAS content directly to your website. SAS Web Parts for Microsoft SharePoint is supported on Microsoft 64-bit machines.

SAS Web Parts for Microsoft SharePoint includes the following components:

- SAS Web Parts Service
  
  This service runs in a separate Microsoft Internet Information Server (IIS) application from SharePoint, and can be installed on the same machine where SharePoint resides or on a separate machine. SAS Web Parts Service for Microsoft SharePoint provides communication between SAS Web Parts and your SAS servers. This web service can be hosted on your SharePoint server or another Microsoft Windows machine that is running Microsoft Internet Information Server.

  The SAS Web Parts Service must be able to connect to your SAS servers via SAS Integration Technologies. Therefore, a firewall cannot exist between the SAS Web Parts Service and the SAS servers. Because the SAS Web Parts connect to the service via SOAP over HTTPS, a firewall can exist between the SAS Web Parts Service and SharePoint. In the most common and simple deployments, this service runs on the SharePoint server.

- SAS Web Parts
  
  This component is deployed on the SharePoint server, and consists of the following parts:
• SAS Content Viewer Web Part is used for dashboards, for key performance indicators (KPIs) to enable users to monitor organizational performance, and for SAS stored processes.

• SAS Central Web Part lists your SAS Visual Analytics report favorites and history.

For more information about SAS Web Parts for Microsoft SharePoint, refer to the SAS Web Parts for Microsoft SharePoint: Administrator’s Guide.

Preparing to Deploy

Before you start installing and configuring SAS Web Parts for Microsoft SharePoint, make sure that you have done the following:

• Decide how you will deploy SAS Web Parts for Microsoft SharePoint:
  • automatic deployment
    The SAS Deployment Wizard installs and configures SAS Web Parts for Microsoft SharePoint for you.
  • manual deployment
    You manually install and configure SAS Web Parts for Microsoft SharePoint using a command line deployment script.

    For more information about manually installing SAS Web Parts for Microsoft SharePoint, refer to the SAS Web Parts for Microsoft SharePoint: Administrator’s Guide.

• Determine which machine each component is deployed on.

  For more information, review the topology diagram that accompanies your deployment plan, and see “What Is SAS Web Parts for Microsoft SharePoint?” on page 145

• Choose the type of user access that you plan to implement.

  For more information, see “Configuring SAS Web Parts for Microsoft SharePoint User Access” on page 146.


Configuring SAS Web Parts for Microsoft SharePoint User Access

Users of SAS Web Parts for Microsoft SharePoint can access content in the SAS servers in one of two modes:

• actual identity (default)

• shared identity

Actual identity controls user access to SAS Web Parts explicitly through a SAS metadata identity and the permissions associated with that identity. Users might have permissions in SharePoint to view a page, but they can be denied access to the web part’s content if they are not granted permission to access the dashboard or stored process in SAS metadata. For information about creating metadata identities and assigning permissions, see “About User Administration” in SAS Intelligence Platform: Security Administration Guide.
Shared identity controls user access to SAS Web Parts through a single identity defined in SAS metadata that all users share. Authentication of the individual user is managed by SharePoint.

**CAUTION:**

When using shared identity, it is important in SharePoint to grant access to only those users who are allowed to view SAS content.

To enable shared identity, you have to select the **Custom** option for the prompting level in the SAS Deployment Wizard:

On the SAS Web Parts for Microsoft SharePoint Details page, enter the shared identity in the **SAS User ID** field:
If you are implementing shared identity, make sure that you perform the following tasks:

- If using shared identity, designate a user account and define it in SAS metadata. For more information, see “Add Users” in SAS Management Console: Guide to Users and Permissions.
- Grant the shared identity access to SAS Folders in SAS Management Console. For more information, see “Access Management Tasks” in SAS Management Console: Guide to Users and Permissions.

Automatically Deploy SAS Web Parts for Microsoft SharePoint

This topic provides an overview for how you use the SAS Deployment Wizard to automatically install and configure SAS Web Parts for Microsoft SharePoint. For more information about automatically deploying SAS Web Parts for Microsoft SharePoint, see “Install and Configure SAS Interactively” on page 90.

1. Follow the instructions for deploying SAS listed in “Install and Configure SAS Interactively” on page 90, along with the following steps listed in this topic.

   The steps that follow pertain to actions that you take while running the SAS Deployment Wizard.

2. On the Select Deployment Step and Products to Install page, select the deployment plan for the SharePoint machine.
3. Choose **Express** or **Typical**.

Choose **Custom** if you want to change the default values for the following properties:

- site name
- port
- installation directory for the SAS Web Parts Service
- application pool
- web application URL
- site collection URL
- user access to a shared identity

For more information, see “Configuring SAS Web Parts for Microsoft SharePoint User Access” on page 146.
4. Choose the option **Automatically Deploy SAS Web Parts for Microsoft SharePoint** to deploy and automatically configure the application.

5. If you chose the custom prompting level earlier, you eventually see the SAS Web Parts Service for Microsoft SharePoint page. On this page you can change various default settings. Make any necessary changes and click **Next**:
   • In the **Site name** field, specify the name of the site for the SAS Web Parts Service. This site will be added to the configuration of Internet Information Services.
• In the **Port** field, specify the port where the SAS Web Parts Service should run. The SAS Web Parts Service must run under HTTPS and must be a different port than any previous SAS Web Parts Service installations.

• In the **Physical directory** field, specify the site directory for the SAS Web Parts Service. If this directory does not exist, it will be created for you.

• In the **Application pool** field, specify the application pool for the SAS Web Parts Service. If this pool does not exist, it will be created for you.

6. If you chose the custom prompting level earlier, you eventually see the SAS Web Parts for Microsoft SharePoint Details page. On this page you can change various default settings. Make any necessary changes and click **Next**:

• In the **Web Application URL** field, specify the web URL of the SharePoint server. This URL is the web application where the web parts will be installed.

• In the **Site Collection URL** field, specify the site collection URL of the SharePoint server. This site collection is where the web parts will be activated.

• In the **SAS user ID** field, specify the user ID to connect to SAS. If this field is left blank, the user ID for SharePoint is used.
7. When you see the Deployment Summary page, the deployment wizard has finished collecting installation and configuration input. This is the last opportunity to go back and change any information that you have provided in previous pages before the wizard begins writing to your system.

Make one of the following choices:

- Click **Start** to begin automatically installing SAS Web Parts for Microsoft SharePoint files and writing the configuration to the current machine.
- Click **Back** to navigate to earlier wizard pages to change installation and configuration information previously entered.
- Click **Cancel** to terminate the wizard session. Note that you will lose installation and configuration information previously entered.
8. When you see the Deployment Complete page, click Next.

9. On the Additional Resources page, click Finish to close the deployment wizard.

10. Next, secure SAS Web Parts for Microsoft SharePoint.

11. If you are using SAS Visual Analytics 7.5 or higher, you need to perform steps for Microsoft SharePoint to work with SAS Visual Analytics. See “Post-Deployment Tasks for SAS Web Server” in SAS Visual Analytics: Installation and Configuration Guide (Distributed SAS LASR).

Configure HTTPS Connections for SAS Web Parts for Microsoft SharePoint

The connection between SAS Web Parts and the SAS Web Parts Service requires Hypertext Transfer Protocol Secure (HTTPS) to encrypt the communication. HTTPS uses Secure Socket Layer (SSL) and public key cryptography, which is based on the implementation of a public and private key pair.

To enable HTTPS, an SSL server certificate must be attached to the SAS Web Parts Service. If your organization has a standard procedure for obtaining an SSL server certificate, follow those guidelines and attach that certificate to the service.

Another alternative is to use a self-signed SSL certificate for the SAS Web Parts Service. Because the secure communication occurs only between SAS Web Parts and SAS Web Parts Service, the self-signed certificate needs to be imported only into the Microsoft SharePoint machine’s certificate store. Refer to your Microsoft Internet Information Server (IIS) documentation for instructions on how to create and install the self-signed certificate, and complete the following steps:

1. On the machine hosting the SAS Web Parts Service, use the IIS Manager to create a self-signed certificate and associate it with the SASWebPartsService website.
2. On the SharePoint Server host, import the self-signed certificate into Internet Explorer’s Trusted Root Certification Authorities store.

For more information about how to create and install a self-signed certificate, see the following SAS Note:

http://support.sas.com/kb/39/912.html
Appendix 2

Troubleshooting Your Initial SAS 9.4 Deployment

Overview of Troubleshooting Your Initial SAS 9.4 Deployment

The SAS Deployment Wizard performs two major functions. Using inputs that you have provided, the wizard installs SAS, and then initially configures SAS. There are many components to a SAS Intelligence Platform deployment, but if one component happens not to deploy properly, it does not mean that you have to repeat the entire deployment. In most cases you can continue with the rest of the SAS deployment, and later troubleshoot the component that failed to deploy.

For more troubleshooting information, see Usage Note 42197: A list of papers useful for troubleshooting system performance problems, available at http://support.sas.com/kb/42/197.html.

If you encounter a configuration error while running the SAS Deployment Wizard, follow these steps:

1. Read the configuration alert box and, leaving the alert box displayed, take any steps that it suggests.

2. After you have performed the steps, go back to the configuration alert box and click Retry.

3. If the configuration alert box re-appears and you are unable to resolve the issue, keep the deployment wizard as it is, and contact SAS Technical Support.
There can be situations when the configuration failed before the SAS Deployment Manager is properly configured. When this occurs, running the deployment manager is not an option. In these situations, you must do the following:

- Stop the metadata server (if it is running).
- Restore the most recent backup of the metadata repository and repository manager that you created before deploying.
- Restore the most recent backup of the web application server directories.
- If any servers that failed to configure were installed as services on Windows, manually remove their service definitions.
  For more information, see your Microsoft Windows documentation.
- Manually delete the configuration directories for the SAS components that failed to configure.

**Review SAS Deployment Tool Documents, Reports, and Logs**

During configuration of SAS 9.4 the SAS automated deployment tools create various documents, reports, and logs that can help you identify any remaining configuration tasks and errors. Use the following documents to perform any manual configuration steps and correct any configuration errors:

- Instructions.html contains a list of SAS manual steps that must be performed to complete your deployment. Instructions.html resides under the SAS configuration directory in the `Lev1/Documents` subdirectory (for example: `C:\SAS\Config\Lev1\Documents`).
- DeploymentSummary.html contains a list of the deployment tasks performed by the SAS Deployment Wizard and a brief status for each. The deployment summary is one source for a list of all the SAS products installed and configured in addition to information such as servers started, web applications built, and web applications deployed.
DeploymentSummary.html resides under the SAS configuration directory in the `Lev1/Documents` subdirectory (for example: `C:\SAS\Config\Lev1\Documents`).

- **ConfigurationErrors.html** contains a list of configuration errors that require further attention. ConfigurationErrors.html resides under the SAS configuration directory in the `Lev1/Documents` subdirectory (for example: `C:\SAS\Config\Lev1\Documents`).

- **UpdateInstructions.html** contains a list of SAS manual steps that must be performed to complete adding maintenance to your deployment. UpdateInstructions.html resides under the SAS configuration directory in the `Lev1/Documents` subdirectory (for example: `C:\SAS\Config\Lev1\Documents`).

- **Configuration logs (as needed)** provide a finer list of errors for each SAS component that the SAS Deployment Wizard migrates and configures. There is one log file for each SAS component. The configuration logs reside under the SAS configuration directory in the `Lev1/Logs/Configure` subdirectory (for example: `C:\SAS\Config\Lev1\Logs\Configure`).

- **SDW_YYYY-MM-DD-HH-MM-SS.log** logs SAS Deployment Wizard messages, which can be used for general troubleshooting. The deployment wizard log is written to the following path:
  - Windows:
    `\Users\user\AppData\Local\SAS\SASDeploymentWizard`
  - Windows (Windows XP and earlier):
    `\Documents and Settings\user\Local Settings\Application Data\SAS\SASDeploymentWizard`
  - UNIX:
    `home-directory/.SASAppData/SASDeploymentWizard`

- **ResponseRecord_yyyy-mm-dd-hh.mm.ss.log**
  In SAS 9.4M2, the deployment wizard automatically records your responses, regardless of whether you run the wizard with the `-record` option. The deployment wizard response record is written to the same paths for the SAS Deployment Wizard message log (listed earlier).

- **SDM_YYYY-MM-DD-HH-MM-SS.log** logs SAS Deployment Manager messages, which can be used for general troubleshooting. The deployment manager log is written to the following path:
  - Windows:
    `\Documents and Settings\user\Local Settings\Application Data\SAS\SASDeploymentWizard\9.4`
  - Windows (Vista only):
    `\Users\user\AppData\Local\SAS\SASDeploymentWizard`
  - UNIX:
    `home-directory/.SASAppData/SASDeploymentWizard`
Troubleshooting the SAS Server Tier

The following table lists some SAS server-tier errors and what to do to resolve them.

**Table A2.1  Troubleshooting the SAS Server Tier**

<table>
<thead>
<tr>
<th>Error</th>
<th>Explanation</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>On UNIX and Linux platforms, a SAS server process fails.</td>
<td>There can be various causes.</td>
<td>Check <code>/var/log/messages</code> to determine the cause of the failure.</td>
</tr>
<tr>
<td>The SAS Deployment Wizard attempts to install Microsoft .NET Framework 3.5 during the System Requirements phase, and a failure occurs.</td>
<td>The Microsoft .NET Framework is now a part of the Windows operating system.</td>
<td>Follow the instructions in SAS Note 48410.</td>
</tr>
<tr>
<td>When you attempt to run a SAS server for the first time, you receive an error message about the IOMServerAppender not finding a location for storing temporary utility files.</td>
<td>There is no temporary directory defined on the host machine's operating system.</td>
<td>Use the method appropriate for the server machine's operating system to define a temp directory. For more information, see “IOMServerAppender” in SAS Logging: Configuration and Programming Reference.</td>
</tr>
<tr>
<td>Pooled workspace server fails to start during the configuration of SAS Web Infrastructure Platform.</td>
<td>On Windows, the SAS installer might not have domain-qualified the SAS Spawned Servers user account (sasrv). This account is entered as a login in the SAS General Servers group, so it is required to have a domain prefix as are all Windows logins. Without domain qualifying the login, connections by this account become PUBLIC connections. By default, PUBLIC users cannot access the repository, which prevents the pooled workspace server from launching successfully. On UNIX, there might be a problem with the host name value returned by TCP.</td>
<td>On Windows, using SAS Management Console, edit the login associated with the SAS General Servers group and add a domain to it (for example: myhost\sasrv). You can edit logins in the Plug-ins tab of SAS Management Console: <code>User Manager ⇄ SAS General Servers ⇄ Accounts ⇄ Edit</code>. On UNIX, modify <code>/etc/hosts</code> or use the <code>-hostknownby</code> option. For more information, see “General Options” in SAS Intelligence Platform: Application Server Administration Guide.</td>
</tr>
<tr>
<td>Error</td>
<td>Explanation</td>
<td>Resolution</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
<td>------------</td>
</tr>
<tr>
<td>You cannot validate the logical workspace server from SAS Management Console (SASApp) using the Server Manager plug-in.</td>
<td>By default, the unrestricted user is a SAS internal account. The workspace server needs an operating system user account and an identity in metadata to be able to authenticate itself to the machine on which it runs.</td>
<td>Re-try the validation from SAS Management Console. You should be prompted for user account credentials. Enter credentials for a user account that the workspace server can authenticate and that has (on Windows) the Log in as a batch job user rights. One account that meets these requirements is the SAS Spawned Servers account (sasrv).</td>
</tr>
<tr>
<td>After you have updated the user’s credentials to allow access, you are denied access when trying to connect to or validate a server or spawner.</td>
<td>The credentials cache must be cleared before you try to connect or validate again.</td>
<td>To clear the credentials cache, in SAS Management Console, click File ➪ Clear Credentials Cache.</td>
</tr>
<tr>
<td>You cannot start a pooled workspace server and cannot start a stored process server.</td>
<td>Most likely, something is wrong with the object spawner. The metadata server might not be able to authenticate the object spawner.</td>
<td>Make sure that the object spawner is running. For more information, see “Operating Your Servers” in SAS Intelligence Platform: System Administration Guide.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If you cannot start the object spawner, make sure that the metadata server is running. Check the log for the object spawner and determine whether the spawner is able to find the server's definition. For more information, see “Using SAS Management Console to Monitor SAS Servers” in SAS Intelligence Platform: System Administration Guide. Also check the event log on Windows or the syslog on UNIX or z/OS.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can correct the credentials used to authenticate the spawner in the SAS-configuration-directory/ObjectSpawner/metadataConfig.xml file, or reconfigure the spawner using the SAS deployment tools. For more information, see “Overview of Managing Your SAS Deployment” on page 163.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Make sure that no one has assigned user admin capabilities to the SAS Trusted User account (sastrust@saspw, by default).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On UNIX, check the Object Spawner log just after it starts for an entry similar to: Objspawn is executing on host machine.name.domain.com (10.101.0.98). If you see something similar to: Objspawn is executing on host localhost (127.0.0.1) or, if you see a host name that you cannot ping from a remote machine, you might need to replace the -dnsMatch option with the -hostknownby option. Refer to the following SAS Note: <a href="http://support.sas.com/kb/42/905.html">http://support.sas.com/kb/42/905.html</a>.</td>
</tr>
</tbody>
</table>
### Error  
**You cannot start your SAS server.**  

The file sas.servers might not be automatically generated. This does not imply any issue with your configuration and does not indicate something is wrong.  

Generate the sas.servers file manually by running `SAS-installation-directory/SASDeploymentManager/9.4/products/cfgwizard_94340_prt_xx_sp0_1/Config/level_root/generate_boot_scripts.sh.unx.orig`. For more information, see “Using the sas.servers Script on UNIX or z/OS to Start or Stop All Servers” in *SAS Intelligence Platform: System Administration Guide*.

---

### Error  
**You see an error message about the location of the JUnit JAR file not being specified for SAS Deployment Tester.**  

The SAS Deployment Tester tests other products that use JUnit for validation. Without JUnit, these products might operate properly, but you will not be able to validate them using the SAS Deployment Tester.

On Windows, the JUnit JAR file is available from the Third-Party Software Downloads site at [http://support.sas.com/resources/thirdpartysupport/v94/othersw.html#tab_junit](http://support.sas.com/resources/thirdpartysupport/v94/othersw.html#tab_junit). Place the JUnit JAR file in this location: `C:\junit3.8.1\junit.jar`.


---

### Error  
**A Deployment Tester error message in the Windows Event Viewer reads:**  

**System error 1067**  

The Deployment Tester cannot start because it is configured to run as a Windows Local Service instead of a Local System account.

The workaround is to use the Windows Services snap-in to change the Deployment Tester Service logon from LocalService to LocalSystem. For more information, see [http://support.sas.com/kb/35/418.html](http://support.sas.com/kb/35/418.html).

---

### Troubleshooting SAS Web Applications

The following table lists some SAS web application errors and what to do to resolve them.

<table>
<thead>
<tr>
<th>Error</th>
<th>Explanation</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>You cannot start your SAS server.</td>
<td>The file sas.servers might not be automatically generated. This does not imply any issue with your configuration and does not indicate something is wrong.</td>
<td>Generate the sas.servers file manually by running <code>SAS-installation-directory/SASDeploymentManager/9.4/products/cfgwizard_94340_prt_xx_sp0_1/Config/level_root/generate_boot_scripts.sh.unx.orig</code>. For more information, see “Using the sas.servers Script on UNIX or z/OS to Start or Stop All Servers” in <em>SAS Intelligence Platform: System Administration Guide</em>.</td>
</tr>
<tr>
<td>You see an error message about the location of the JUnit JAR file not being specified for SAS Deployment Tester.</td>
<td>The SAS Deployment Tester tests other products that use JUnit for validation. Without JUnit, these products might operate properly, but you will not be able to validate them using the SAS Deployment Tester.</td>
<td>On Windows, the JUnit JAR file is available from the Third-Party Software Downloads site at <a href="http://support.sas.com/resources/thirdpartysupport/v94/othersw.html#tab_junit">http://support.sas.com/resources/thirdpartysupport/v94/othersw.html#tab_junit</a>. Place the JUnit JAR file in this location: <code>C:\junit3.8.1\junit.jar</code>. On UNIX, modify <code>provider.config</code> in <code>SAS-configuration-directory/DeploymentTesterServer/Config</code> and update the <code>ReadOnlyVar._junitJar</code> parameter (for example, <code>ReadOnlyVar._junitJar=/apps/sas/third_party/junit/junit4.8.1/junit-4.8.1.jar</code>).</td>
</tr>
<tr>
<td>A Deployment Tester error message in the Windows Event Viewer reads: <strong>System error 1067</strong></td>
<td>The Deployment Tester cannot start because it is configured to run as a Windows Local Service instead of a Local System account.</td>
<td>The workaround is to use the Windows Services snap-in to change the Deployment Tester Service logon from LocalService to LocalSystem. For more information, see <a href="http://support.sas.com/kb/35/418.html">http://support.sas.com/kb/35/418.html</a>.</td>
</tr>
<tr>
<td>Error</td>
<td>Explanation</td>
<td>Resolution</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SAS Web Report Studio or the SAS Information Delivery Portal displays a “Cannot find server” error.</td>
<td>Either your servlet container or web application server is not running. There is problem with the URL that you are using to start the application.</td>
<td>Make sure that your servlet container or web application server is running. If it is not running, start it. This will probably solve the problem. If the server is already running, the problem could be with the URL that you are using to start the web application. Use the correct URL: <a href="http://host-name:port-number/application-name">http://host-name:port-number/application-name</a>. Make sure that the host name is the fully qualified name of the host on which your servlet container or web application server is running. Make sure that the port number identifies the port on which the server is listening. For the SAS Web Application Server, this will normally be port 8080. Finally, make sure that the application name in the URL matches the actual name of the web application (including case).</td>
</tr>
<tr>
<td>Each time your web application requests a new page, there is a long delay.</td>
<td>When a Java Server Page (JSP) is requested for the first time, you can expect a significant delay. When all of your JSPs have been converted to compiled servlets, the problem will be resolved.</td>
<td>Tune your servlet container or web application server.</td>
</tr>
<tr>
<td>The SAS Information Delivery Portal displays a “Could not authenticate user” error.</td>
<td>The user is not registered in the metadata repository. On Windows, if the user that is trying to log on is registered in the metadata, but the user name is not domain qualified, the user will not be able to log on.</td>
<td>In SAS Management Console, add a login to the Person object that contains at least a user name. On Windows, make sure the user name has the form host\user-ID or domain\user-ID. For more information, see “About User Administration” in SAS Intelligence Platform: Security Administration Guide.</td>
</tr>
<tr>
<td>You receive a server error when accessing the Help menu from a SAS web application.</td>
<td>SAS Help Viewer Metadata Configuration is not configured.</td>
<td>Rerun the SAS Deployment Wizard to install and configure SAS Help Viewer Metadata Configuration. For more information, see “Install and Configure SAS Interactively” on page 90.</td>
</tr>
<tr>
<td>An error page appears when you access the Help menu from a SAS application or the Help menu item for a SAS application is not displayed.</td>
<td>The online Help for the SAS application was not installed or the SAS Help Viewer Metadata Configuration web application was not rebuilt after the online Help was installed.</td>
<td>Verify that the online Help was installed. If not, install it using the SAS Deployment Wizard. Once the Help is installed, rebuild the SAS Help Viewer Metadata Configuration web application using the SAS Deployment Manager and redeploy the SAS Help Viewer Metadata Configuration EAR. For more information, see “Install and Configure SAS Interactively” on page 90 and “Rebuild the SAS Web Applications” in SAS Intelligence Platform: Middle-Tier Administration Guide.</td>
</tr>
</tbody>
</table>
Overview of Managing Your SAS Deployment

The following sections discuss how to use the SAS 9.4 deployment tools to add, update, or configure a SAS product, remove a SAS product configuration, and renew your software license for certain SAS solutions.
For information about removing a SAS installation, see “Overview of Uninstalling the SAS Intelligence Platform” on page 231.

Adding, Updating, and Upgrading SAS Software

What Is Adding, Updating, and Upgrading?

This document uses the terms “adding,” “updating,” and “upgrading” in the following ways.

- “Adding” refers to installing and configuring a SAS product that is new to your system. Here are some common scenarios:
  - You ordered the SAS product but did not install it.
  - You are deploying new products from a new SAS order.
- “Upgrading” refers to installing and configuring new versions of SAS products that are already deployed on your system (for example, upgrading to SAS Web Report Studio 4.3 from version 4.2). Upgrading should not be confused with migration or promotion.

For more information, see SAS Guide to Software Updates and Product Changes.

Summary of Adding, Updating, and Upgrading SAS Software

When you are adding, updating, or upgrading your SAS 9.4 deployment, the SAS Deployment Wizard is able to determine whether the order from which you are running the wizard contains SAS software with a newer, older, or identical release level than what is already deployed in the SAS installation directory (commonly referred to as SASHome).

If the wizard determines that there is newer SAS software in the current order than what is already deployed, then the wizard automatically goes into Update mode. Update mode forces you to install updates to your software before you can perform any other deployment task. For example, if you are adding new products or language support to an existing SAS deployment, you will install those in an additional SAS Deployment Wizard session, after the wizard (in Update mode) has first updated the products on your machine to match the versions contained in your SAS order.

**CAUTION:**

Consult SAS Guide to Software Updates and Product Changes before performing any SAS updates.

For more information, see the following:

- “How the SAS Deployment Wizard Adds, Updates, and Upgrades Software” on page 165
- “Adding SAS Products” on page 167
- “Configuring SAS Products” on page 185
- SAS Guide to Software Updates and Product Changes
How the SAS Deployment Wizard Adds, Updates, and Upgrades Software

This topic describes in greater detail how the SAS Deployment Wizard adds, updates, and upgrades SAS software.

The wizard compares the release version of the SAS software in the current order to the SAS software that is deployed on the machine. Three possibilities exist:

• The software in the order has a newer release level than the software deployed on the machine.

• The software in the order has an older release level than the software deployed on the machine.

• The software in the order has an identical release level as the software deployed on the machine.

Upgrades and updates consist of a new version or an incremental update (also referred to as maintenance) to an installed product. If the deployment wizard detects that one or more products in the order have a newer release level than any products deployed in the specified SASHome on the machine, the wizard goes into Update mode. (SAS Home is shorthand for the SAS installation directory for example, C:\Program Files\SAS).

The wizard displays an updates page of all the products deployed on the machine for which there are updates in the current order.

The deployment wizard updates page is broken into two sections that list new product versions and new product updates (or maintenance).

Consider this example. SAS Providers for OLE DB (64-bit) represents a new product version (9.4 to 9.41). SAS Threaded Kernel Core Routines (64-bit) represents an update (9.4 to 9.41_M4). If you choose to proceed with your deployment from this order, to the specified SAS Home, the wizard requires that you install these updates to bring your existing deployment to the release level from which your new order was mastered. When you click Next, the wizard automatically upgrades the products to the release levels that are shown on the updates page.

CAUTION:
Consult SAS Guide to Software Updates and Product Changes before performing any SAS updates.

When running in Update mode, the wizard does not prompt for a deployment plan, SAS installation data file, or language. The wizard simply installs the newest versions and updates of the product set already deployed in the specified SASHome. If the update contains updated language support for a specific product (such as, SAS, SAS Enterprise Guide, and SAS Add-In for Microsoft Office), the wizard installs only the update for the languages previously installed. If you are adding new products or language support to an existing SAS deployment, you will install those in an additional SAS Deployment Wizard session, after the update is installed and any customization or validation is performed.

If the deployment wizard detects that one or more products in the software order has an older release level than any products deployed in the specified SASHome on the machine, the wizard does not go into Update mode. Instead, the wizard presents you with an alert box listing those products in your order that are older than the ones deployed on your machine.
SAS wants to make sure that you are always installing software from an order corresponding to a release level that is identical to or newer than the one used to originally deploy your SAS software. Your options are to use a different software order, designate a different SASHome directory, or uninstall the products that are newer.

If the deployment wizard detects that all the products in the order have an identical release level to all products deployed in the specified SASHome on the machine, the wizard does not go into Update mode. Instead, the wizard presents pages that enable you to perform normal deployment tasks such as deploying products, installing additional software, and so on.

The following diagram summarizes how the SAS Deployment Wizard manages deploying products, installing additional software, and applying updates:

Figure A3.1 SAS Deployment Wizard Flowchart

Updating Reporting Components

When you add SAS Visual Analytics components to your SAS system, you must update any existing SAS Visual Analytics components that are deployed on your SAS system. This enables them to work with the new components. The reason that you must update
them is because SAS Intelligence Platform and SAS Visual Analytics share a group of common reporting components.

When the wizard’s Select Products to Configure page is displayed, you must manually select the following common reporting components:

- SAS Visual Analytics Administrator
- SAS Visual Analytics Configuration Data
- SAS Visual Analytics Extensions for Services
- SAS Visual Analytics Services

*Note:* The new SAS Visual Analytics components that you are adding are already selected. The wizard configures them by default.

*Figure A3.2  Select Products to Configure Page with Common Reporting Components Selected*

If you are upgrading your SAS system to a new release as well as adding SAS Visual Analytics components, you must run the wizard twice. During the first run, the wizard detects the common reporting components and goes into Update mode to automatically install the latest versions of these components. (For a more detailed explanation of Update mode, see “How the SAS Deployment Wizard Adds, Updates, and Upgrades Software” on page 165.) When you run the wizard the second time, be sure to select the common reporting components previously listed.

---

**Adding SAS Products**

**Overview of Adding SAS Products**

The following topics are contained in this section:

- “About SAS Software Orders and SAS Software Depots” on page 168
The SAS Deployment Wizard enables you to change your SAS 9.4 deployment. Here are some of the most common scenarios:

1. configuring new products from your initial SAS 9.4 order.
   For one reason or another, you ordered the software and did not install it. Or you installed the software, but chose not to configure it.

2. deploying additional products from a new SAS 9.4 order.
   The additional products are not a part of your original SAS 9.4 order. So you made another order and now have to download and deploy the new order.

3. re-installing and reconfiguring (redeploying) a SAS product.
   You want to move the SAS product to a new machine.

4. applying updates (maintenance) to a SAS product that requires also updating its configuration.
   For some reason, you were unable to finish applying the updates and you need to rerun the SAS Deployment Manager to complete the updates to your configuration.

Most SAS products require that you install and configure them in a two-step process: You shut down your SAS metadata, compute, and middle-tier (web) servers; and you run the SAS Deployment Wizard to install the new products. Then you restart some servers and rerun the deployment wizard to configure the newly installed products.

A few products, such as SAS Drivers for ODBC, do not require the configuration step. You simply shut down your SAS metadata, compute, and middle-tier (web) servers; install the new products; and then restart what you shut down.

**CAUTION:**

*Prohibition of copying SASHome and the SAS Configuration directories* SAS does not support manually copying the SAS installation (SASHome) and the SAS Configuration directories to other machines. Manually copying SAS software prevents you from applying future software maintenance and updates.

---

**About SAS Software Orders and SAS Software Depots**

A SAS Software Depot is a file system that consists of a collection of SAS installation files that represents one or more orders. The depot is organized in a specific format that is meaningful to the SAS Deployment Wizard, which is the tool that is used to install and initially configure SAS. The depot contains the SAS Deployment Wizard executable, one or more deployment plans, SAS installation data files, order data, and product data.

A SAS Software Depot is designed to contain your initial SAS 9.4 software order and additional orders that you make in the future. When you download your additional order to your pre-existing software depot, you download only those products that you do not already have. If you are downloading an additional order and creating a new software depot, then your download time could be longer.
When you add a new SAS software order to your pre-existing SAS Software Depot, you run the SAS Download Manager and specify the location of the original depot. For more information, see “Create a SAS Software Depot Using the SAS Download Manager” on page 37.

If you decide that you want to create a new SAS Software Depot for your new software order, you also run the SAS Download Manager. However, first make sure that you have fulfilled the necessary requirements described in “Prerequisites for Creating a SAS Software Depot” on page 36.

Add SAS Products That Do Not Require Configuration

Some SAS products such as SAS/ACCESS Interface to Oracle do not require the SAS Deployment Wizard to configure them. If the products that you are adding to your SAS deployment do not require configuration, follow these steps:

1. Verify that you have installed all the necessary third-party software outlined in “About the Java Runtime Environment” on page 67.

   **Note:** During the SAS installation, the SAS Deployment Wizard prompts you for paths to the requested third-party software. You must have the necessary third-party software installed on the current machine, or the SAS Deployment Wizard will not let you continue with the installation. In this situation, you will have to end the SAS Deployment Wizard session and install the required third-party software before you can continue.

2. Make sure that your SAS Software Depot is accessible to all the machines on which you are installing SAS. If this is not possible, then you will have to copy the entire depot to a location that the target machine can access.

   For information about copying your depot to a location that is not on your network, see “Create a Disc Image of Your Order” on page 59.

3. If you are installing a SAS 9.4 product that is not a part of your original order, make sure that you have downloaded the additional order.

   For more information, see “About SAS Software Orders and SAS Software Depots” on page 168.

4. Shut down your SAS metadata, compute, and middle-tier (web) servers.

   For more information, see “Operating Your Servers” in *SAS Intelligence Platform: System Administration Guide*.

5. Log on to the machine as the SAS Installer user.

   This is the user with which your SAS deployment was installed. For more information, see “Required External User Accounts for SAS” on page 10.

6. Start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the command appropriate for your operating system.

   **Table A3.1** Start Up Commands for the SAS Deployment Wizard

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>setup.exe -record -deploy</td>
</tr>
<tr>
<td>UNIX</td>
<td>setup.sh -record -deploy</td>
</tr>
</tbody>
</table>
For more information, see “Creating SAS Software Depots” on page 36.

You should see a welcome page similar to the following:

7. Select the language that you want the SAS Deployment Wizard to use when it displays text.

8. Select Install SAS Software.

9. If you have more than one SAS software order in your depot, the wizard prompts you to select the order that you want to install.

10. If the wizard detects that there are SAS software products in your order that are more recent than what you have deployed on your machine, then the wizard automatically goes into Update mode. For more information, see “Summary of Adding, Updating, and Upgrading SAS Software” on page 164.

If you need to install product updates, then follow these steps:

a. Install the updates using the SAS Deployment Wizard.

   \textit{CAUTION:} Consult \textit{SAS Guide to Software Updates and Product Changes} before performing any SAS updates.

b. Perform any required manual configuration steps.

   \textit{Note:} If you performed an update on a machine, we recommend that you update all of the machines in your SAS deployment first. After you have updated all of the machines in your SAS deployment, deploy your additional SAS products.

11. Restart the SAS Deployment Wizard, following the directions in \textit{Step 6 on page 169}.

12. On the Select Deployment Type page, choose the following option:

   • \textbf{Install Additional Software}

   This option provides a list of available software from which you select what to install. Software installed using this option can be configured only manually.
13. (UNIX and z/OS only) Specify the location (SASHome) where you want to install SAS.

14. On the Select Products to Install page, select the products that you want to install.

Remember that the deployment wizard will not configure any of your selections. The wizard only installs the software.

*Note:* If the product that you are adding is a SAS Foundation product, then select **SAS Foundation**, and select Next. The subsequent page lists the SAS Foundation products from which you choose the product that you want to add.

15. Some products listed on the Select Products to Install page, such as SAS Foundation, include multiple sub-products, which you see on the next page. In these situations, select from those additional products, such as **SAS/ACCESS Interface to Oracle**, and click Next.
16. Specify the location of the SAS installation data file that contains information about the software that you have licensed for the current machine.

**CAUTION:**
Be careful to use the correct installation data file that contains the SAS products that you are planning to install. Using an incorrect file can cause installation failure for SAS add-on products or other errors later when attempting to run SAS.

17. When you see the Deployment Summary page, the deployment wizard has finished collecting installation input. This is the last opportunity to go back and change any information that you have provided in previous pages before the wizard begins writing to your system.

Make one of the following choices:

- Select **Start** to begin installing SAS files to the current machine.
- Select **Back** to navigate to earlier wizard pages to change installation information previously entered.
- Select **Cancel** to terminate the wizard session. Note that you will lose installation information previously entered.
18. Provide the remaining information as the wizard prompts you for it. For more information, see “Install and Configure SAS Interactively” on page 90.

When you see a page similar to the following, the SAS Deployment Wizard is finished:

19. Click Next to go to the Additional Resources page.

20. Click Finish to close the deployment wizard.


   For more information, see “Operating Your Servers” in SAS Intelligence Platform: System Administration Guide.
To verify that your SAS product was actually installed, please run a registry report.
For more information, see http://support.sas.com/kb/35/968.html.

Add SAS Products That Require Configuration

Most SAS products that you add to your deployment require that you install and configure them in a two-step process: You shut down your SAS metadata, compute, and middle-tier (web) servers; and you run the SAS Deployment Wizard to install the new products. Then you restart some servers and rerun the deployment wizard to configure the newly installed products.

If the products that you are adding to your SAS deployment require configuration, follow these steps:

1. Verify that you have installed all the necessary third-party software outlined in “About the Java Runtime Environment” on page 67.

   Note: During the SAS installation, the SAS Deployment Wizard prompts you for paths to the requested third-party software. You must have the necessary third-party software installed on the current machine, or the SAS Deployment Wizard will not let you continue with the installation. In this situation, you will have to end the SAS Deployment Wizard session and install the required third-party software before you can continue.

2. Make sure that your SAS Software Depot is accessible to all the machines on which you are installing SAS. If this is not possible, then you will have to copy the entire depot to a location that the target machine can access.

   For information about copying your depot to a location that is not on your network, see “Create a Disc Image of Your Order” on page 59.

3. If you are installing a SAS 9.4 product that is not a part of your original order, make sure that you have downloaded the additional order.

   For more information, see “About SAS Software Orders and SAS Software Depots” on page 168.

4. Make sure that you use a deployment plan that contains any add-on products as well as all original products for each machine that you are configuring.

   **Table A3.2 Where Is My Deployment Plan?**

<table>
<thead>
<tr>
<th>SAS 9.4 Products Being Added</th>
<th>Location of My Deployment Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products are part of an order in the same release as my original SAS 9.4 deployment, which is installed on a machine where a SAS 9.4 server, middle tier, or data tier already resides.</td>
<td>The plan is located in the Levn Utilities directory. When adding a planned component, your SAS consultant should be contacted to obtain a new custom plan.</td>
</tr>
<tr>
<td>Products are part of an order in a newer release than my original SAS 9.4 deployment, which is installed on a machine where a SAS 9.4 server, middle tier, or data tier already resides.</td>
<td>The plan is located in the Levn Utilities directory. When adding a planned component, your SAS consultant should be contacted to obtain a new custom plan.</td>
</tr>
</tbody>
</table>

5. Shut down your SAS metadata, compute, and middle-tier (web) servers.
For more information, see “Operating Your Servers” in *SAS Intelligence Platform: System Administration Guide*.

6. Close all SAS clients, such as SAS Management Console.

7. If you have a multiple-machine SAS deployment, it is important to run the SAS Deployment Wizard using your new deployment plan on every machine, following this order:
   a. Metadata server or servers
   b. SAS servers
   c. SAS data servers
   d. SAS middle-tier servers
   e. SAS clients

8. Log on to the machine as the SAS Installer user.
   This is the user with which your SAS deployment was installed. For more information, see “Required External User Accounts for SAS” on page 10.

9. Start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the command appropriate for your operating system:

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>setup.exe -record -deploy</td>
</tr>
<tr>
<td>UNIX</td>
<td>setup.sh -record -deploy</td>
</tr>
<tr>
<td>z/OS</td>
<td>setup.rexx -record -deploy</td>
</tr>
</tbody>
</table>

   To use a temporary directory other than /tmp, specify -templocation new-temp-dir.

   For more information, see “Creating SAS Software Depots” on page 36.

   You should see a welcome page similar to the following:

10. Select the language that you want the SAS Deployment Wizard to use when it displays text.

11. Select **Install SAS Software**.
12. If you have more than one SAS software order in your depot, the wizard prompts you to select the order that you want to install.

13. If the wizard detects that there are SAS software products in your order that are more recent than what you have deployed on your machine, then the wizard automatically goes into Update mode.

For more information, see “Adding, Updating, and Upgrading SAS Software” on page 164.

If you need to install product updates, then follow these steps:

a. Install the updates using the SAS Deployment Wizard.

   **CAUTION:**
   Consult *SAS Guide to Software Updates and Product Changes* before performing any SAS updates.

b. Perform any required manual configuration steps.

   **Note:** If you performed an update on a machine, we recommend that you update all of the machines in your SAS deployment first. After you have updated all of the machines in your SAS deployment, deploy your additional SAS products.

14. If you are adding a product to the SAS middle tier, make sure that the SAS Web Infrastructure Platform Data Server is not running.

   For more information, see “Use Individual Scripts to Operate Servers” in *SAS Intelligence Platform: System Administration Guide*.

15. Restart the SAS Deployment Wizard, following the directions in Step 9 on page 175.

16. On the Select Deployment Type page, choose **Perform a Planned Deployment** and **Install SAS Software**.

   **Note:** Make sure that Configure SAS Software is deselected.

17. (UNIX and z/OS only) Specify the location (SASHome) where you want to install SAS.
18. Specify the type of deployment plan that you are using.

- customized deployment plan
  
  Choose Specify the full path to a customized deployment plan, and then click Browse to navigate to the plan file.

- standard deployment plan
  
  Choose Select a standard deployment plan, and then choose the appropriate deployment plan in the drop-down list.

19. Select the machine on which you are installing, and select the SAS products that you want to install by doing the following:

a. Select the machine on which you are installing software from the Machine drop-down list.

  Note: If you are deploying SAS on multiple machines, make sure that you are following the process described in “Installation Order Rules for Multiple Machine Deployments” on page 78.

b. By default, all products displayed will be installed. Leave all products selected. If there are no product changes, then the deployment wizard will not re-install any pre-existing products.

20. If you are installing SAS on a Windows 64-bit operating system, you will see a wizard page that asks you which mode you want to install SAS Foundation in (32-bit or 64-bit mode). The advantage to installing SAS in 64-bit mode is that you can access memory beyond the four GB limit imposed by the 32-bit Windows operating system. For more information, consult the deployment wizard online Help.

21. Specify the location of the SAS installation data file that contains information about the software that you have licensed for the current machine.

**CAUTION:**

Be careful to use the correct installation data file that contains the SAS products that you are planning to install. Using an incorrect file can cause
installation failure for SAS add-on products or other errors later when attempting to run SAS.

22. (z/OS only) Provide input for the following prompts:


- **FTP Batch Generation**
  Specify the fully qualified host name or IP address of the z/OS mainframe machine on which you are deploying SAS. Also supply a valid user ID and password with which the SAS Deployment Wizard will FTP deployment information to the mainframe machine.

- **Specify Jobcard Information**
  Specify the job account, programmer name, message class, message level, time, and region values. For more information, consult your z/OS documentation.

- **Select Installation Action**
  Choose B - Add products to existing SAS libraries.

- **Specify New Installation Qualifier**
  Specify the path where you want to install SAS. You can also choose to require Storage Management Subsystem (SMS) parameters. For more information, consult your z/OS documentation.

- **Specify IBM's SMS Parameters**
  If you chose to require Storage Management Subsystem (SMS) parameters on the previous page, enter them here. For more information, consult your z/OS documentation.

- **Specify Parameters**
  These are all parameters that are used in various DD statements throughout the installation. For more information, consult your IBM JCL documentation.

- **Specify Entry Point**
  Specify the parameters for various ways that SAS can be run with different performance implications. Choose SAS (default ENTRY point) to run the unbundled configuration. Choose SASB to run the bundled configuration. Choose SASLPA to run the bundled configuration with some modules installed in the Link Pack Area (LPA).

- **Specify Parameters**
  Specify additional parameters for DD statements. VOLDISK designates the VOLSER that the installed data sets will go to. For more information, consult your IBM JCL documentation.

- **Specify Parameters**
  Specify parameters used for reblocking the SAS load modules to a library with an optimum block size.

23. Deselect any languages that you do not want SAS to support. By default, SAS attempts to support all languages that your machine's operating system is configured for.
24. Review the list of required third-party software that is required for the SAS software that you are installing on the current machine. (The list of third-party software depends on the SAS software that you are installing on the current machine.)

25. In the pages that immediately follow, be prepared to provide paths to these third-party applications. (The number of wizard pages varies depending on the SAS software that you are deploying on the current machine.)

*Note:* You must provide valid paths to the requested third-party software, or the SAS Deployment Wizard will not let you continue with the installation.

26. The SAS Deployment Wizard has finished collecting installation input. This is the last opportunity to go back and change any information that you have provided in previous pages before the wizard begins writing to your system.

Make one of the following choices:

- Select **Start** to begin installing SAS files to the current machine.
- Select **Back** to navigate to earlier wizard pages to change installation information previously entered.
- Select **Cancel** to terminate the wizard session. Note that you will lose installation information previously entered.

When you see a page similar to the following, the SAS Deployment Wizard is finished:
27. Click **Next** to go to the Additional Resources page.

![SAS Deployment Wizard](image)

28. Click **Finish** to close the deployment wizard.

29. To configure the SAS products that you just installed, proceed to “Configure SAS Products” on page 185.

---

### Add SAS Products to a SAS Middle-Tier Horizontal Cluster

A SAS horizontal middle-tier cluster consists of a primary machine and additional machines referred to as cluster nodes. Anytime that you add SAS software to the primary
machine, you must also update the configuration for each cluster node using the SAS Deployment Wizard.

To update SAS software on a horizontal middle-tier cluster node, you must perform the following tasks:

1. Add the software to the primary horizontal middle-tier cluster machine first.
   For more information, see “Add SAS Products That Require Configuration” on page 174.

2. Reconfigure the primary horizontal middle-tier cluster machine.
   When you reconfigure the machine, the Select Product to Reconfigure page should resemble the following:

   ![Select Product to Reconfigure](image)

   For more information, see “Add SAS Products That Require Configuration” on page 174.

   If you are distributing SAS web applications across multiple machines and you have two or more different configurations of web applications on your machines, you can cluster each of the different configurations using the deployment wizard, Web Application Server: Cluster Configuration page.
Use the drop-down list to select the machine that you are clustering. For example, your middle tier might resemble the following:

- Machine 1: SAS Web App Servers: WRS, Portal - cluster A

3. Add the software to each middle-tier cluster node machine, using the same process as in Step 1.
4. Reconfigure each middle-tier cluster node machine, using the same process as in Step 2.

### Add a SAS Deployment Agent Service (Windows Only)

The SAS Deployment Agent is required for deployments that run remote processes. SAS uses the agent to copy content and to perform configuration management operations associated with creating new servers and clustering. It is also used for server administration tasks such as deployment backups.

To add a SAS Deployment Agent service on Windows using the SAS Deployment Manager, follow these steps:

1. On the machine on which you want to add an agent, navigate to `SAS-installation-directory` from the Windows Start menu All Programs ➔ SAS ➔ SAS Deployment Manager 9.4.
2. In the Choose Language dialog box, select a language, and click OK.
4. Make your agent start-up options selections and click **Next**:  
   - Select **Start SAS Deployment Agent After Configuration** to restart the SAS Deployment Agent when this configuration is complete.
   - Select **Start SAS Deployment Agent Automatically when Windows Starts** to restart the agent whenever Windows restarts.

5. The SAS Deployment Manager has finished collecting input. This is the last opportunity to go back and change any information that you have provided in previous pages before the deployment manager begins writing to your system. Make one of the following choices:
   - Select **Start** to begin adding the service to the current machine.
   - Select **Back** to navigate to earlier deployment manager pages to change input previously entered.
   - Select **Cancel** to terminate the deployment manager session. Note that you will lose information previously entered.

6. When the SAS Deployment Manager has added the service, the Deployment Complete page opens. Click **Finish** to close the SAS Deployment Manager.

---

**Add SAS Visual Analytics Administration and Reporting**

If you are adding on SAS Visual Analytics or SAS Visual Analytics Administration and Reporting to SAS 9.4 (SAS 9.4_M0) or later, do the following before deploying your SAS software order:

1. On your middle-tier machines, check your deployment summary to determine whether you already have these two SAS components:
   - SAS Visual Analytics Administrator
   - SAS Visual Analytics Services

Your SAS Deployment Registry is located on your machine here:
2. If you plan to deploy the middle tier for SAS Visual Analytics or SAS Visual Analytics Administration and Reporting to:
   • the same middle-tier machine, then you do not need to do anything further before deploying your SAS software order.
   • a different middle-tier machine, continue to step 3.
3. Before deploying your SAS software order, unconfigure these two SAS software components:
   • SAS Visual Analytics Administrator
   • SAS Visual Analytics Services

---

**What Is Configuring and Unconfiguring?**

This document uses the terms *configuring* and *removing a configuration* (unconfiguring) in the following ways.

- **configuring**
  
  In addition to installing products, the SAS automated deployment tools also configure products. In most deployment scenarios, you install and configure in one SAS Deployment Wizard session. But, because the deployment wizard enables you to separate installation and configuration into separate tasks, it is possible that you can install a SAS product and then configure it later by rerunning the wizard. Therefore, you *configure* SAS products that have been installed on your system that have not yet been configured.

  For more information, see “Configure SAS Products” on page 185.

  Your SAS configuration is affected when you add SAS products to a deployment that requires configuration.

  For more information, see “Adding SAS Products” on page 167.

- **removing a configuration**
  
  Deleting one or more product configurations is referred to as removing a configuration. The following scenarios for removing SAS product configurations are common:

    • uninstalling a SAS product
    • adding new SAS products that require you to remove the current configuration before configuring it again
    • correcting configuration errors

  For more information, see “Removing a SAS Configuration” on page 197.
Configuring SAS Products

About Configuring SAS Products

You can configure SAS products that are new to your deployment, or configure SAS products that you are updating or upgrading:

- “Configure SAS Products” on page 185
- “Configure Updated or Upgraded SAS Products” on page 192

Note: As the SAS Metadata Server manages the repository that contains SAS configured objects, this server cannot be reconfigured by the SAS Deployment Manager. For more information, refer to the SAS Intelligence Platform: System Administration Guide.

Configure SAS Products

Follow these steps to use the SAS Deployment Wizard to configure SAS products that you have already installed.

Note: If you are reconfiguring SAS products, when the deployment wizard prompts you for a configuration directory, we recommend that you reuse the former configuration directory instead of creating a new directory.

1. Make sure that the machine where you want to add the new SAS 9.4 software contains the necessary user accounts, groups, and ports.
   For more information, see Chapter 3, “Creating Users and Groups and Designating Ports,” on page 7.

2. Back up your SAS 9.4 deployment. For more information, see “About the Deployment Backup and Recovery Tool” in SAS Intelligence Platform: System Administration Guide.

3. If you are reconfiguring SAS Web Parts for Microsoft SharePoint that was deployed manually, read the following topic before proceeding: “Reconfiguring SAS Web Parts for Microsoft SharePoint” in SAS Intelligence Platform: Web Application Administration Guide.

4. Make sure that the SAS servers on your SAS server tier are running.
   For more information, see “Operating Your Servers” in SAS Intelligence Platform: System Administration Guide.

5. If you are adding a product to the SAS middle tier, make sure that the SAS Web Infrastructure Platform Data Server is running.
   For more information, see “Use Individual Scripts to Operate Servers” in SAS Intelligence Platform: System Administration Guide.

6. Start the SAS Web Server or the third-party web server on the middle tier. Make sure that the SAS Deployment Agent is running. Your SAS Web Application Server should not be running.
   Note: If you are adding a stand-alone middle-tier node, there are no SAS programs to start.
7. Make sure that you use a deployment plan that contains any add-on products as well as all original products for the machine that you are configuring.

**Table A3.4 Where Is My Deployment Plan?**

<table>
<thead>
<tr>
<th>SAS 9.4 Products Being Added</th>
<th>Location of My Deployment Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are part of my original SAS 9.4 order</td>
<td>In the <code>plan_files</code> directory in the original SAS Software Depot</td>
</tr>
<tr>
<td>Are on a machine where a SAS 9.4 server, middle tier, or data tier already resides</td>
<td>In the SAS configuration directory in the <code>Utilities</code> directory</td>
</tr>
<tr>
<td>Are part of my new SAS 9.4 order</td>
<td>In the <code>plan_files</code> directory in the SAS Software Depot</td>
</tr>
</tbody>
</table>

8. Log on to the machine on which you want to add the new SAS 9.4 products as the SAS Installer user. This is the user with which your SAS deployment was installed. For more information, see “Required External User Accounts for SAS” on page 10.

9. Start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the command appropriate for your operating system.

**Table A3.5 Start Up Commands for the SAS Deployment Wizard**

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td><code>setup.exe -record -deploy</code></td>
</tr>
<tr>
<td>UNIX</td>
<td><code>setup.sh -record -deploy</code></td>
</tr>
<tr>
<td>z/OS</td>
<td><code>setup.rexx -record -deploy</code></td>
</tr>
</tbody>
</table>

For more information, see “Creating SAS Software Depots” on page 36.

You should see a welcome page similar to the following:

10. Select the language that you want the SAS Deployment Wizard to use when it displays text.
11. Select **Install SAS Software**.

12. If you have more than one SAS software order in your depot, the wizard prompts you to select the order that you want to configure.

13. If the wizard detects that there are SAS software products in your order that are more recent than what you have deployed on your machine, then the wizard automatically goes into Update mode.

   For more information, see “Adding, Updating, and Upgrading SAS Software” on page 164.

If you need to install product updates, then follow these steps:

a. Install the updates using the SAS Deployment Wizard.

   **CAUTION:** Consult *SAS Guide to Software Updates and Product Changes* before performing any SAS updates.

b. When you are finished performing any required manual configuration steps, rerun the SAS Deployment Wizard.

14. Select **Perform a Planned Deployment** and **Configure SAS Software**.

   **Note:** Make sure that **Install SAS Software** is deselected.

15. Specify the type of deployment plan that you are using.

   - customized deployment plan
     
     Choose **Specify the full path to a customized deployment plan**, and then click **Browse** to navigate to the plan file.

   - standard deployment plan
     
     Choose **Select a standard deployment plan**, and then choose the appropriate plan in the drop-down list.
16. If there are multiple machines in your SAS deployment, select the machine on which you are configuring.

The deployment wizard lists the SAS products in your order that should be installed on the machine.

17. Choose either the **Typical** or the **Custom** configuration prompting level. You want to be able to access the configuration page where you can set the SAS Metadata Server. The Express prompt level does not allow you to access this SAS server configuration setting.

*Note:* When adding SAS 9.4 products that require configuring, make sure that you specify the metadata repository name if the one that you are using has a name other than the default (Foundation). To access the deployment wizard page to specify a custom repository name, choose the Custom configuration prompting level.

18. On the Specify Configuration Information page, specify the configuration directory and level for your current SAS deployment to which you are adding the new configuration.

19. If you are adding the products that you are configuring to an existing SAS deployment, you are asked to confirm your selection.

20. In the Select Products to Configure page, choose only those products that you want to configure on the machine.

The SAS Deployment Wizard has queried the metadata about your current configuration and checked the appropriate products to be configured.

*We recommend that you accept the product selections displayed on this page.*
Note: If you are deploying a middle-tier node machine, make sure that SAS Web Application Server Node Configuration is selected.

Note: If you manually configured the web application server when you deployed SAS 9.4, then configure it again manually. If the deployment wizard automatically configured your web application server, then choose the automatic configuration option.

21. Provide the remaining configuration information as the wizard prompts you for it. (The actual number of configuration pages that you must provide input for depends on the prompt level that you chose.) For more information, see Step 9 on page 92 in the topic, “Install and Configure SAS Interactively.”

22. When you see the Deployment Summary page, the deployment wizard has finished collecting configuration input. This is the last opportunity to go back and change any information that you have provided in previous pages before the wizard begins writing to your system.

Make one of the following choices:

- Select Start to begin writing the configuration to the current machine.
- Select Back to navigate to earlier wizard pages to change configuration information previously entered.
- Select Cancel to terminate the wizard session. Note that you will lose configuration information previously entered.
When you see a page similar to the following, the SAS Deployment Wizard is finished:

23. Click **Next** to go to the Additional Resources page.
24. Click **Review Manual Configuration Instructions** and complete any necessary manual configuration steps.

The SAS Deployment Wizard writes the Instructions.html file to the Documents directory on the SAS configuration path. For example:

- UNIX and z/OS:
  
  `/opt/SAS/Lev1/Documents/Instructions.html`

- Windows:
  
  `C:\SAS\Config\Lev1/Documents/Instructions.html`

*Note:* The wizard backs up your previous Instructions.html file to the **Backup** subdirectory under the **Documents** directory on the SAS configuration path (for example, `C:\SAS\Config\Lev1\Documents\Backup\Instructions.html_YYYY-MM-DD-HH.MM.bak`).

25. If you encounter error messages about your SAS license expiring, you might need to perform another procedure to correct this.

*Note:* You might also encounter SAS license expiration errors when you are adding on SAS products.

For more information about how to fix SAS license expiration errors, refer to the following documents:


26. Click **Finish** to close the deployment wizard.

27. When you have completed manual configuration tasks, and you have made the necessary backups, repeat these steps listed in this topic on each machine defined in your deployment plan.
28. For multi-machine deployments, back up your metadata repository and your SAS configuration directory before you run the SAS Deployment Wizard on the next machine called for by your deployment plan. For more information, see “About the Metadata Server Backup Facility” in SAS Intelligence Platform: System Administration Guide.

29. If you are using SAS Deployment Tester to verify your deployment, then be sure to restart SAS Deployment Tester Server before running your deployment tests.

30. When you are finished installing and configuring SAS on each machine called for in your deployment plan, proceed to the section, “Validate the SAS 9.4 Servers” on page 119.

Configure Updated or Upgraded SAS Products

Follow these steps to use the SAS Deployment Manager to configure SAS products for which you have already installed updates or upgrades.

Note: The SAS Deployment Wizard and the SAS Download Manager can be run on operating systems that do not have windowing systems. For more information, see the SAS Deployment Wizard and SAS Deployment Manager User's Guide available at: http://support.sas.com/documentation/installcenter/en/ikdeploywizug/66034/PDF/default/user.pdf

1. Make a backup of your SAS 9.4 deployment. For more information, see “About the Deployment Backup and Recovery Tool” in SAS Intelligence Platform: System Administration Guide.

2. If you are using your own Transport Layer Security (TLS) certificates, then you must reconfigure your certificate settings.

   For more information, see SAS Intelligence Platform: Middle-Tier Administration Guide.

3. On the SAS compute server tier, stop all SAS servers except the metadata server. On the SAS middle tier, stop all servers except the SAS Web Infrastructure Platform Data Server.

   (Your SAS Web Application Server and your SAS Environment Manager server should not be running.)

   For more information, see “Operating Your Servers” in SAS Intelligence Platform: System Administration Guide.

4. If you are reconfiguring SAS Web Parts for Microsoft SharePoint that was deployed manually, read the following topic before proceeding: “Reconfigure a Manual Deployment of SAS Web Parts for Microsoft SharePoint” in SAS Intelligence Platform: Web Application Administration Guide.

5. Log on to the machine on which you want to update the SAS product configuration as the SAS Installer user. This is the user with which your SAS deployment was installed and updated. For more information, see “Required External User Accounts for SAS” on page 10.

6. On the host machine for the products whose configurations you are updating, navigate to SAS-installation-directory/SASDeploymentManager/9.4 and launch sasdm.exe (Windows), sasdm.sh (UNIX), or sasdm.rexx (Z/OS). On Windows, you can use the shortcut on the Start menu.

7. In the Choose Language dialog box, select a language, and click OK.
8. In the SAS Deployment Manager, select **Update Existing Configuration**.

![SAS Deployment Manager](image)

9. In the next page, specify the configuration directory and the level (for example, **Lev1**) that you want to update.

   **Note:** Anytime you configure your deployment, you must also configure your web application server, even if your configuration does not involve your SAS middle tier. If you manually configured the web application server when you deployed SAS 9.4, then configure it again manually. If the deployment wizard automatically configured your web application server, then choose the automatic configuration option.

![Select Configuration Directory/Level](image)

10. If you are running in a UNIX environment, restart the SAS Metadata Server:
a. At a UNIX prompt, navigate to the directory where the SAS Metadata Server is configured.

b. Enter `./MetadataServer.sh start`.

11. In the next page, enter the user ID and password for an unrestricted administrative user.

12. When you see the Summary page, the deployment manager has finished collecting configuration input. This is the last opportunity to go back and change any information that you have provided in previous pages before the manager begins writing to your system.

   - Select **Start** to begin writing the configuration to the current machine.
   - Select **Back** to navigate to earlier manager pages to change configuration information previously entered.
   - Select **Cancel** to terminate the manager session. Note that you will lose configuration information previously entered.
During the configuration process, SAS automatically restarts your SAS servers, configures your web application servers, and rebuilds and redeploys your SAS web applications.

When you see a page similar to the following, the SAS Deployment Manager is finished:

13. Click **Next** to go to the Additional Resources page.
14. If your configuration:

- encountered errors
  
  The first link on the Additional Resources page goes to the ConfigurationErrors.html file. Click this link and follow the instructions to debug your configuration.

- encountered no errors
  
  The first link on the Additional Resources page goes to the UpdateInstructions.html file. Click this link and follow the instructions to complete any manual steps necessary to complete your configuration.

The SAS Deployment Manager writes its HTML pages to the Documents directory on the SAS configuration path. For example:

- UNIX and z/OS:
  
  `/opt/SAS/Lev1/Documents/UpdateInstructions.html`

- Windows:
  
  `C:\SAS\Config\Lev1\Documents\UpdateInstructions.html`

  *Note:* The manager backs up your previous HTML files to the Backup subdirectory under the Documents directory on the SAS configuration path (for example, `C:\SAS\Config\Lev1\Documents\Backup\UpdateInstructions.html_YYYYMM-DD–HH.MM.bak`).

15. Click **Finish** to close the deployment manager.

Detailed log messages are written to a file called `product-name_updateConfigure_date-and-time.log`, where `product-name` identifies the product that was configured. The deployment manager writes this file to `SAS-configuration-directory\Logs\Configure`. 
Removing a SAS Configuration

Overview of Removing a SAS Configuration

The following topics are contained in this section:

- “Summary of Steps for Removing a SAS Configuration” on page 199
- “Identify Dependent SAS Products” on page 200
- “Remove a Configuration” on page 202
- “Remove a SAS Deployment Agent Service (Windows Only)” on page 204
- “Remove a SAS Configuration on a Horizontal Middle-Tier Cluster” on page 205

The Remove Existing Configuration feature of the SAS Deployment Manager provides an automated way to remove one or more products of a SAS Intelligence Platform configuration from your environment. With this feature, you can remove the configurations of all SAS products or just selected products from a machine. You can remove configuration information only, or you can also remove associated user-created content. (For more information about the other SAS Deployment Manager features, see “Overview of SAS Deployment Manager” in SAS Intelligence Platform: System Administration Guide.)

Note: You can automate running the deployment manager when you need to perform the same configuration action on many machines in your deployment. The deployment manager uses the same record and playback mechanism as the SAS Deployment Wizard to perform a non-interactive, silent configuration. For more information, see “Overview of Automating the SAS Installation on Multiple Machines” on page 122.
Note: The SAS Deployment Manager does not uninstall or otherwise affect the SAS software that is located in the SAS installation directory. To uninstall SAS software, see “Overview of Uninstalling the SAS Intelligence Platform” on page 231.

The Remove Existing Configuration feature of the SAS Deployment Manager is useful for the following purposes:

- to remove a product that you will no longer be using.
- to move a product (for example, a SAS Application Server) from one machine to another. In this situation, you would do the following:
  1. Use the SAS Deployment Manager to remove the product's (and any dependent product's) configuration from the first machine.
  2. Use the SAS Deployment Wizard to install and configure the product on the second machine.
- to recover from errors in the initial configuration of a product or to implement different configuration options for a product. In these situations, you would do the following:
  1. Use the SAS Deployment Manager to remove the product's configuration.
  2. Use the SAS Deployment Wizard to configure the product on the same machine, and select different configuration options than you selected previously.

When you remove a product's configuration, the SAS Deployment Manager performs the following tasks:

- stops the product (or the associated service) if it is running, as well as any dependent products (or associated services). For example:
  - If you are removing the configuration of a running OLAP server, then it stops the server. If the server is installed as a Windows service, then it stops the service.
  - If you are removing the configuration of a running metadata server, then it stops the server (or the associated Windows service). It also stops any running servers and services that depend on the metadata server, OLAP servers, stored process servers, workspace servers, pooled workspace servers, batch servers, SAS/SHARE servers, and SAS/CONNECT servers.

  Note: The SAS Deployment Manager does not stop the object spawner. You must do this manually.

- deletes metadata objects that contain the product's configuration information. For example, if you remove a server configuration, then the server's metadata definition is removed and the server no longer appears in the Server Manager tree in SAS Management Console.

- on Windows systems, deletes shortcuts that are associated with the product. For example, if you remove a server configuration, then any shortcuts for starting, stopping, pausing, or resuming the server are deleted.

- on Windows systems, deletes the service (if applicable) that is associated with the product. For example, if you remove a server configuration, and if the server runs as a Windows service, then the service is removed.

- deletes configuration files and directories that are associated with the product. For example, if you remove the configuration for a SAS OLAP server, then the server's configuration directory, files, scripts, sasusers directory, and logs directory are deleted. The only exception is sasv9_usermods.cfg, which is retained if its contents have changed since the initial installation.
• deletes site-specific portal content if you are removing the configuration for the SAS Information Delivery Portal and if you select the option to Remove user content for SAS Information Delivery Portal. The content that is removed includes portal pages; portlets; changes to page navigation, page layout, and package sort order; and other similar customizations.

• determines whether other products in your deployment depend on the removed products. If dependent products exist, and if you have not selected those products for removal, then the SAS Deployment Manager prompts you to remove them. For example, the SAS BI Dashboard depends on the SAS Information Delivery Portal. If you choose to remove the configuration for the SAS Information Delivery Portal, but you do not also choose to remove the configuration for the SAS BI Dashboard, then the SAS Deployment Manager prompts you to include it for removal. For more information about dependencies, see “Identify Dependent SAS Products” on page 200.

• creates an HTML page that lists the items that were removed and describes any additional manual tasks that you need to perform. The page is created in a temporary location. You should save it to a permanent location on your network or file system.

• writes detailed log messages to a file called product-name_unconfigure_date-and-time, where product-name identifies the product that was removed. The deployment manager writes this file to SAS-configuration-directory\Logs\Configure.

Summary of Steps for Removing a SAS Configuration

Here is a summary of the steps that you should take when removing a configuration:

1. Determine which products' configurations to remove.

2. Determine which products depend on the products that you are removing. You will need to remove the configuration for each of these products. For details, see “Identify Dependent SAS Products” on page 200.

3. Remove SAS product configurations in reverse order in which they were installed:
   a. Remove SAS client configurations first.
   b. Remove the middle tier with other web applications (such as SAS BI Dashboard, SAS Web Report Studio, and so on).
   c. Remove the middle tier with SAS Web Infrastructure Platform.
   d. Remove the SAS application servers (such as workspace or stored process servers) on machines other than the metadata server machine.
   e. Remove the metadata server last.

4. For each product that you plan to remove, identify the machine where it is installed.
   Note: On Windows, in order to run the SAS Deployment Manager, you must be a member of the machine’s Windows Administrator group.

In a single-machine installation, you can remove the configurations of multiple products as well their dependent products in a single execution of the SAS Deployment Manager.

In a multiple-machine installations, you should remove middle-tier products first. Then remove products on the SAS server tier. If you are removing the metadata server, you should remove it last.
5. Create a complete backup of your system before removing a configuration. This backup should include a correct backup of the metadata server. (See “About the Deployment Backup and Recovery Tool” in SAS Intelligence Platform: System Administration Guide.) This step is important because it is not possible to undo the removal of a configuration.

6. Read the following list to determine which SAS processes should be stopped or running:

   - Metadata server
     You should also run the metadata server.
   - Object spawner
     You must stop the object spawner if you are removing one of the servers that it runs.
   - Web Infrastructure Platform Data Server
     When removing a SAS configuration on the middle tier, the Web Infrastructure Platform Data Server must be running.

   Note: If you are removing a server, you might want to stop the server (or its associated service), although this is not required.

7. When all of the preparatory steps are complete, follow the steps that are described in “Remove a Configuration” on page 202.

**Identify Dependent SAS Products**

If you remove the configuration of a product that another product depends on, then the dependent product would not be able to function. Therefore, when you remove a product’s configuration, the SAS Deployment Manager requires that you also remove the configurations of any dependent products.

Product dependencies are shown in the following table. If you remove the configuration for a product in the left column, then you must also remove the configurations for all of the products that are in the right column opposite that product. For example:

   - If you remove the SAS BI Dashboard configuration, then you do not need to remove any other products. No products depend on the SAS BI Dashboard.
   - If you remove the SAS BI Report Services Workspace Configuration, then you must also remove the following dependent products: BI Report Services, SAS BI Dashboard, SAS Web Report Studio, and SAS Web Report Viewer.
   - If you remove the SAS Metadata Server configuration, then you must remove all other products.

   Note: For information about the order for removing SAS products, see “Overview of Uninstalling the SAS Intelligence Platform” on page 231.

**Table A3.6 Dependencies in the SAS Intelligence Platform**

<table>
<thead>
<tr>
<th>Product</th>
<th>Dependent Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS BI Report Services</td>
<td>None</td>
</tr>
<tr>
<td>SAS BI Dashboard Configuration Data</td>
<td>None</td>
</tr>
<tr>
<td>Product</td>
<td>Dependent Products</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td>SAS BI Lineage Scheduling Server</td>
<td>None</td>
</tr>
<tr>
<td>SAS BI Portlets</td>
<td>None</td>
</tr>
<tr>
<td>MySQL Database Server</td>
<td>None</td>
</tr>
<tr>
<td>Platform Process Manager</td>
<td>SAS Web Report Studio</td>
</tr>
<tr>
<td>SAS Application Server Context</td>
<td>All SAS products</td>
</tr>
<tr>
<td>SAS BI Dashboard</td>
<td>SAS Strategy Management Extensions for SAS BI Dashboard</td>
</tr>
<tr>
<td>SAS Foundation Services</td>
<td>SAS Web Infrastructure Platform</td>
</tr>
<tr>
<td>SAS Web Server</td>
<td>SAS Web Application Server</td>
</tr>
<tr>
<td>SAS Web Application Server</td>
<td>All SAS web-based products</td>
</tr>
<tr>
<td>SAS Web Infrastructure Platform Data Server</td>
<td>All SAS web-based products</td>
</tr>
<tr>
<td>SAS Stored Process Server</td>
<td>SAS Strategy Management</td>
</tr>
<tr>
<td>SAS Web Infrastructure Platform</td>
<td>Most SAS web-based products</td>
</tr>
<tr>
<td>SAS Enterprise Miner</td>
<td>None</td>
</tr>
<tr>
<td>SAS Flex Application Themes</td>
<td>SAS BI Dashboard</td>
</tr>
<tr>
<td>SAS BI Report Services Workspace</td>
<td>SAS Web Report Studio</td>
</tr>
<tr>
<td></td>
<td>SAS Web Report Viewer</td>
</tr>
<tr>
<td></td>
<td>SAS BI Report Services</td>
</tr>
<tr>
<td>SAS Grid Manager Control Server</td>
<td>SAS Grid Manager Client Utility Configuration</td>
</tr>
<tr>
<td></td>
<td>SAS Grid Manager Node Configuration</td>
</tr>
<tr>
<td>SAS Information Delivery Portal</td>
<td>SAS BI Portlets</td>
</tr>
<tr>
<td></td>
<td>SAS BI Dashboard</td>
</tr>
<tr>
<td></td>
<td>SAS Strategy Management</td>
</tr>
<tr>
<td></td>
<td>SAS Strategy Management Portlets</td>
</tr>
<tr>
<td>SAS object spawner</td>
<td>SAS Workspace Server</td>
</tr>
<tr>
<td></td>
<td>SAS Pooled Workspace Server</td>
</tr>
<tr>
<td></td>
<td>SAS Stored Process Server</td>
</tr>
<tr>
<td></td>
<td>Operating System Services Scheduling Server</td>
</tr>
<tr>
<td>Product</td>
<td>Dependent Products</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SAS Pooled Workspace Server</td>
<td>SAS BI Report Services Workspace Configuration</td>
</tr>
<tr>
<td></td>
<td>SAS BI Dashboard</td>
</tr>
<tr>
<td></td>
<td>SAS Decision Services Server Configuration</td>
</tr>
<tr>
<td>SAS Web Report Studio</td>
<td>SAS BI Portlets</td>
</tr>
<tr>
<td></td>
<td>SAS BI Dashboard</td>
</tr>
<tr>
<td></td>
<td>SAS Information Delivery Portal</td>
</tr>
<tr>
<td>SAS Workspace Server</td>
<td>SAS Forecast Server</td>
</tr>
<tr>
<td></td>
<td>SAS Model Manager</td>
</tr>
<tr>
<td></td>
<td>SAS BI Lineage Scheduling Server</td>
</tr>
<tr>
<td></td>
<td>SAS High-Performance Risk Server</td>
</tr>
<tr>
<td></td>
<td>SAS Visual Analytics Administrator</td>
</tr>
<tr>
<td></td>
<td>SAS Time Series Studio</td>
</tr>
<tr>
<td></td>
<td>SAS Visual Data Builder</td>
</tr>
<tr>
<td></td>
<td>SAS Visual Analytics Administration</td>
</tr>
<tr>
<td></td>
<td>SAS BI Dashboard</td>
</tr>
</tbody>
</table>

* These products depend on the product in the left column. Therefore, they must be removed if the product in the left column is removed.

When you remove a product's configuration, the SAS Deployment Manager checks to see whether your deployment plan includes any products that depend on that product. If dependent products exist, and if you have not selected those products for removal, then the SAS Deployment Manager prompts you to remove them.

**Remove a Configuration**

In a single-machine installation, you can remove the configurations of multiple products as well their dependent products in a single execution of the SAS Deployment Manager.
In a multiple-machine installations, you should remove middle-tier product configurations first. Then remove product configurations on the SAS server tier. If you are removing the metadata server configuration, then you should remove it last.

Note: When removing a configuration, the SAS Deployment Manager does not delete any configuration log files associated with the configuration. However, server log files are removed.

Follow these steps to run the SAS Deployment Manager to remove the configurations from each machine:

1. Make sure that you have completed the preparatory steps that are described in “Summary of Steps for Removing a SAS Configuration” on page 199.

Note: On Windows, in order to run the SAS Deployment Manager, you must be a member of the machine’s Windows Administrator group.

2. Make sure that you have are removing the SAS configurations in the sequence specified in Summary of Steps for Removing a SAS Configuration on page 199.

3. On the host machine for the products whose configurations you are removing, navigate to SAS-installation-directory/SASDeploymentManager/9.4 and launch sasdm.exe (Windows), sasdm.sh (UNIX), or sasdm.rexx (z/OS). On Windows, you can use the shortcut on the Start menu.

4. In the SAS Deployment Manager, select Remove Existing Configuration.

If you are removing the SAS Information Delivery Portal, then you can also select the option to remove user content that is associated with the portal. If you select this option, the SAS Deployment Manager removes portal pages; portlets; changes to page navigation, page layout, and package sort order; and other similar customizations.

CAUTION: Use caution when choosing the option to remove user content for the SAS Information Delivery Portal. The content cannot be recovered unless you have a complete backup of your system.
5. If you have more than one SAS configuration, the wizard prompts you to specify the configuration directory and the level (for example, Lev1) from which the configuration is to be removed.

6. In the next page, enter the user ID and password for an unrestricted administrative user.

7. On the next page, select the check boxes for the products that you want to remove. For each product that you select, be sure to also include the other products on the machine that depend on that product. (See “Identify Dependent SAS Products” on page 200).

8. Detailed log messages are written to a file called product-name_unconfigure_date-and-time.log, where product-name identifies the product that was removed. The deployment manager writes this file to SAS-configuration-directory\Logs\Configure.

9. When the configuration removal is complete, the Additional Resources page is displayed. In this page, click on the following document name:

configuration-name-and-level_ConfigurationRemoval.html_YYYY-MM-DD.HH.MM.SS.html

The document contains details about the products that were removed and additional manual steps that you might need to perform. The document is created in a temporary location. You should save it on your network or your file system so that you can refer to it later.

For details about what occurs when you remove a configuration, see “Overview of Removing a SAS Configuration” on page 197.

After removing the configuration, you might need to take one of the following additional steps, depending on the reason for the removal:

• run the SAS Deployment Wizard to create a new configuration. For details, see “Configuring SAS Products” on page 185.

• uninstall the associated software (if you will no longer be using the product on the current machine, or if you will be re-installing the software on the current machine). For details, see “Overview of Uninstalling the SAS Intelligence Platform” on page 231.

**Remove a SAS Deployment Agent Service (Windows Only)**

The SAS Deployment Agent is required for deployments that run remote processes. SAS uses the agent to copy content and to perform configuration management operations associated with creating new servers and clustering. It is also used for server administration tasks such as deployment backups.

*Note:* Do not remove the SAS Deployment Agent when reconfiguring your SAS deployment. The SAS Deployment Agent runs outside the context of the SAS configuration and should not be removed unless you are intending to uninstall all of your SAS deployment.

To remove a SAS Deployment Agent service on Windows using the SAS Deployment Manager, follow these steps:

1. On the machine on which you want to add an agent, navigate to SAS-installation-directory from the Windows Start menu All Programs ⇒ SAS ⇒ SAS Deployment Manager 9.4.
2. In the Choose Language dialog box, select a language, and click OK.


   ![SAS Deployment Manager](image)

   Select SAS Deployment Manager Task:

   The SAS Deployment Manager provides tasks to help you manage your software deployment. Select the task you want to perform.

   The following tasks are available for this software deployment:

   - New SAS Deployment Agent Service
   - Configure SAS Deployment Agent Communication Options
   - Add SAS Deployment Agent Service
   - Start SAS Deployment Agent Service
   - Stop SAS Deployment Agent Service
   - Uninstall SAS Deployment Agent Service

   Remove SAS Deployment Agent Service

   Remove the SAS Deployment Agent from Windows services.

4. The SAS Deployment Manager has finished collecting input. This is the last opportunity to go back and change any information that you have provided in previous pages before the deployment manager begins changing your system.

   Make one of the following choices:
   - Select Start to begin removing the service from the current machine.
   - Select Back to navigate to earlier deployment manager pages to change input previously entered.
   - Select Cancel to terminate the deployment manager session.

5. When the SAS Deployment Manager has added the service, the Deployment Complete page opens. Click Finish to close the SAS Deployment Manager.

---

**Remove a SAS Configuration on a Horizontal Middle-Tier Cluster**

A SAS horizontal middle-tier cluster consists of a primary machine and additional machines referred to as cluster nodes. You remove the SAS Web Application Server configuration on the primary machine first, and then remove the configuration on each node.

To remove a SAS configuration on a horizontal middle-tier cluster, follow these steps:

1. Shut down all servers on the primary middle-tier machine and on all of its middle-tier nodes. Also, shut down the SAS Web Server.

2. Unconfigure the products that you want to remove on the primary middle-tier machine first.
Navigate to `SAS-installation-directory/SASDeploymentManager/9.4` and launch `sasdm.exe` (Windows), `sasdm.sh` (UNIX), or `sasdm.rexx` (z/OS). On Windows, you can use the shortcut on the Start menu.

3. Select the language that you want the SAS Deployment Wizard to use when it displays text.

4. In the SAS Deployment Manager, select **Remove Existing Configuration**.

5. If you have more than one SAS configuration, the wizard prompts you to specify the configuration directory and the level (for example, **Lev1**) from which the configuration is to be removed.

6. In the next page, enter the user ID and password for an unrestricted administrative user.

7. On the next page, select the check boxes for the products that you want to remove. For each product that you select, be sure to also include the other products on the machine that depend on that product. (See “Identify Dependent SAS Products” on page 200).

   Detailed log messages are written to a file called `product-name_unconfigure_date-and-time.log`, where `product-name` identifies the product that was removed. The deployment manager writes this file to `SAS-configuration-directory\Logs\Configure`.

8. When the configuration removal is complete, the Additional Resources page is displayed. In this page, click the following document name:

   `configuration-name-and-level_ConfigurationRemoval.html_YYYY-MM-DD.HH.MM.SS.html`

   The document contains details about the products that were removed and additional manual steps that you might need to perform. The document is created in a temporary location. You should save it on your network or your file system so that you can refer to it later.

   **Note:** When removing a configuration, the SAS Deployment Manager does not delete any configuration log files associated with the configuration. However, server log files are removed.

9. Restart these servers that you shut down earlier:
   - SAS Deployment Agent (on each machine in the cluster)
   - JMS server (primary middle tier machine only)

10. On each middle-tier cluster node machine, run the SAS Deployment Manager and select the **Update Existing Configuration** task. For more information, see “Configure Updated or Upgraded SAS Products” on page 192.

   For details about what occurs when you remove a configuration, see “Overview of Removing a SAS Configuration” on page 197.

   After removing the configuration, you might need to take one of the following additional steps, depending on the reason for the removal:

   - run the SAS Deployment Wizard to create a new configuration. For details, see “Configuring SAS Products” on page 185.
   - uninstall the associated software (if you will no longer be using the product on the current machine, or if you will be re-installing the software on the current machine). For details, see “Overview of Uninstalling the SAS Intelligence Platform” on page 231.
Change Locale for SAS

On Windows and UNIX machines, you can use the Locale Setup Manager task in the SAS Deployment Manager to configure the language and region for SAS Foundation and certain SAS applications, such as the following:

- SAS BI Report Services 4.4
- SAS ODS Graphics Editor 9.4
- SAS Information Map Studio 4.4

Using this task, you can do the following:

- change the user interface language for selected clients
- correct the locale for SAS Foundation and clients if the wrong locale was selected during deployment

You run the Locale Setup Manager task from the SAS Deployment Manager. The deployment manager is accessible through the Windows Start menu (Start ⇒ All Programs ⇒ SAS ⇒ SAS Deployment Manager 9.4).

Note: If the SAS Foundation locale is changed and the new locale requires a different encoding, the deployment manager displays a dialog box prompting you to confirm the locale change. If you choose to continue with the change, you must create a new SAS server context to use the new encoding.

For more information about how SAS supports languages and locales in general, see *SAS National Language Support (NLS): Reference Guide*. 
Appendix 4

Configuring an Alternate Database for SAS Web Infrastructure Platform Data Server

Overview of Configuring an Alternate Database

By default, SAS Web Infrastructure Platform Services is configured to use SAS Web Infrastructure Platform Data Server to store transactions for the SAS 9.4 middle tier and certain SAS solutions software. The SAS Web Infrastructure Platform Data Server is a customized version of PostgreSQL 9.1.9 supplied by SAS, that is configured specifically to support SAS 9.4 software, and is integrated with the Deployment Recovery and Backup tool that is new for SAS 9.4.

Note: The database used by SAS Environment Manager, the SAS Deployment Backup and Recovery tool, and certain SAS solutions, such as SAS Visual Analytics, will be PostgreSQL regardless of the database that you choose for the SAS Web Infrastructure Platform.

However, some SAS sites might want to use another data server because the site has experience with a particular database.

Be aware that you can choose an alternative DBMS for the SharedServices database that is used for SAS Web Infrastructure Platform Services, but you must still install, configure, and run the SAS Web Infrastructure Platform Data Server in order to support SAS Environment Manager. Also, the SAS Deployment Backup and Recovery tool does not operate with an alternative DBMS.

Provided that your site has the necessary expertise, you can use an alternate database for SAS Web Infrastructure Platform Services. The process for using an alternate data server consists of the following steps:
1. Determine whether your database has been tested.
2. Prepare your database.
3. Choose the alternative database during SAS deployment.

Depending on your choice of database, SAS Deployment Wizard prompts you for some or all of the following information:

- Host name of the database server
- Port number of the database server or listener
- Database name or SID
- User ID and password
- Location of JDBC drivers for the database

---

**Tested Databases**

SAS tests many third-party database versions with SAS 9.4 Web Infrastructure Platform, but SAS is unable to test every version of every database. SAS recommends that you follow the upgrade recommendations from your database provider to get the latest fixes and security updates. The following version ranges are recommended by SAS. Contact Technical Support if you have questions about a specific version.

- IBM DB2 10.5 or higher
- Microsoft SQL Server 2012 or higher
- MySQL 5.7 or higher
- Oracle 11gR2 or higher
- PostgreSQL 9.5 or higher

---

**SAS Content Server Storage**

The SAS Content Server uses a database for storage. SAS Content Server uses the same database that is used by the SAS Web Infrastructure Platform. The default configuration for the SAS Web Infrastructure Platform is to use the SharedServices database instance on the SAS Web Infrastructure Platform Data Server. However, the SAS Web Infrastructure Platform can be configured to use a third-party vendor database such as Oracle, MySQL, DB2, or SQL Server.

When a third-party vendor database is used, make sure that the database is configured to accept large binary objects such as documents and images. For example, on MySQL, the `max_allowed_packet` variable must be set at least as large as the largest binary object in the SAS Content Server repository.
Preparing to Configure an Alternative Database

DB2

Before deploying SAS 9.4, you must have an IBM DB2 database instance and a user ID (with database administration authority) to access and create tables.

**TIP**
DB2 uses operating-system user IDs by default. Make sure that you identify a user ID that has an account on the operating system. For more information about how to create a user ID and assign permissions, see your DB2 documentation.

When you create the database, the SAS table structure requires the following specifications:

- create a database with a 32KB page size.
  
  For example, using the DB2 Command Line Processor on Windows, you would enter a command similar to the following:
  
  ```
  create database shareddb on /db2 alias shared pagesize 32 k
  ```

- create a bufferpool and tablespaces with these parameters:
  
  - size: 8192K
  - page size: 32KB
  - autoresize: yes
  
  For example, on Windows, you would enter commands similar to the following:
  
  ```
  connect to shared
  create bufferpool shared_bp size 8192 pagesize 32 k
  ```
  
  ```
  create temporary tablespace sys_temp_shared pagesize 32 k managed by database using (file '/db2/shared/ts/shareddb/sys_temp.ts' 500m) autoresize yes bufferpool shared_bp
  ```

  ```
  create large tablespace shared1 pagesize 32 k managed by database using (file '/db2/shared/ts/shareddb/shared1.ts' 50m) autoresize yes bufferpool shared_bp
  ```

  ```
  create user temporary tablespace user_temp_shared pagesize 32 k managed by database using (file '/db2/shared/ts/shareddb/user_temp.ts' 500m) autoresize yes bufferpool shared_bp
  ```

- grant database administration authority.
  
  For example, on Windows, you would enter commands similar to the following:
  
  ```
  grant dbadm on database to user sharedservices
  ```

- configure the DB2 database to support MY SQL grammar.
  
  ```
  db2set DB2_COMPATIBILITY_VECTOR=MY
  ```

  ```
  db2stop
  ```

  ```
  db2start
  ```
Supporting MySQL grammar enables you to query pages of records using the LIMIT/OFFSET feature.

**Note:** The earlier examples in this document were tested on a Microsoft Windows environment. There might be variations for your operating system. Please consult your DB2 documentation for more information.

You must also install the latest compatible version of the JDBC drivers located in `DB2_HOME/java` on the machine that is hosting the SAS Web Application Server. The SAS Deployment Wizard configures the SAS Web Application Server with a JDBC data source that uses a URL that is similar to the following example:

```
jdbc:db2://host:50002/shared
```

If you want the SAS Deployment Wizard to automatically configure and load tables, then confirm that the user account can perform the query `select 1` from `sysibm.sysdummy1` successfully before you start the SAS Deployment Wizard.

**MySQL**

**Note:** Do not create the database. The SAS Deployment Wizard issues the `CREATE DATABASE` statement when it runs.

Before deploying SAS 9.4 when using MySQL, do the following:

- Set the default transaction isolation level to READ-COMMITTED by adding the following line to your MySQL INI file:
  ```
  transaction-isolation=READ-COMMITTED
  ```

- Make sure that you have a MySQL user ID with permission to access and create tables.

  For example, after logging on to MySQL as the root user, you would enter commands similar to the following:

  ```
  create user sharedservices@'%' identified by 'password';
  grant all on sharedservices.* to sharedservices@'%';
  ```

**Tip** For more information about how to create a user ID and assign permissions, see your MySQL documentation.

- You must also install the latest compatible version of the JDBC drivers from MySQL Connector/J on the machine that is hosting the SAS Web Application Server. The SAS Deployment Wizard configures the SAS Web Application Server with a JDBC data source that uses a URL similar to the following example:

  ```
jdbc:mysql://host:3306/SharedServices
  ```

- On Linux, the value of the `lower_case_table_names` option must be changed from its default of zero to one. For more information, see “Identifier Case Sensitivity,” available at [https://dev.mysql.com/doc/refman/5.5/en/identifier-case-sensitivity.html](https://dev.mysql.com/doc/refman/5.5/en/identifier-case-sensitivity.html).

- If you want the SAS Deployment Wizard to automatically configure and load tables, then confirm that the user account can perform the query `select 1` successfully before you start the SAS Deployment Wizard.

**Oracle**

Before deploying SAS 9.4, you must have an Oracle database instance and user ID with permission to access and create tables.
Note: SAS strongly recommends that you use UTF-8 as the character encoding for the database.

Using the Database Configuration Assistant for Oracle, create an Oracle instance specifying `sharedservices` for the SID.

Next, the commands that you would enter would be similar to the following:

```
sqlplus sys@sharedservices as sysdba
create user sharedservices identified by password default
user temporary tablespace temp;
grant connect,resource to sharedservices;
```

**Tip** For more information about how to create a user ID and assign permissions, see your Oracle documentation.

**Important:** For Oracle 12c, you must specify `STANDARD` for the Oracle parameter `max_string_size`. To confirm this value, execute the following query using SQL*Plus:

```
show parameter max_string_size;
```

**Important:** Sites that use Oracle 12 must specify an unlimited quota. Refer to your Oracle documentation for more information.

You must download and install the latest compatible version of the JDBC drivers located in `ORACLE_HOME/product/version/install/jdbc/lib` and place them in a separate directory that does not contain any other files on all middle-tier servers. You can download Oracle JDBC drivers from [http://www.oracle.com/us/downloads/index.html](http://www.oracle.com/us/downloads/index.html).

The JDBC driver version must match the database version.

The SAS Deployment Wizard configures your SAS Web Application Server with a JDBC data source that uses a URL that is similar to the following example:

```
jdbc:oracle:thin:@host:1521:SharedServices
```

If you want the SAS Deployment Wizard to automatically configure and load tables, then confirm that the user account can perform the query `select 1` successfully before you start the SAS Deployment Wizard.

**PostgreSQL**

By default, the SAS Web Infrastructure Platform Data Server is a PostgreSQL database customized for use with SAS. If you choose to use an alternate PostgreSQL database, then it needs to be configured as described below. The alternate PostgreSQL database must be located on a different host than the PostgreSQL database provided by SAS.

Before deploying SAS 9.4, you must have a database instance and user ID with permission to access and create tables.

Log on to the system as the PostgreSQL user ID. Next, the commands that you would issue would be similar to the following:

```
create role sharedservices LOGIN PASSWORD 'password';
createdb SharedServices owner sharedservices encoding 'UTF8'
```

Confirm that the `listen_addresses` parameter in the `postgresql.conf` file permits connections from hosts other than localhost, and that the `pg_hba.conf` file is configured to permit access from the machine that is hosting the SAS Web Application Server.

Install the extension, which provides support for managing Large Objects: `create extension lo;`
For more information about how to create a user ID and assign permissions, see your PostgreSQL documentation.

You must install the latest compatible version of the JDBC driver for PostgreSQL on the machine that is hosting the SAS Web Application Server. SAS requires the 9.1 or later version of the PostgreSQL JDBC driver. The SAS Deployment Wizard configures the SAS Web Application Server with a JDBC data source that uses a URL that is similar to the following example: `jdbc:postgresql://host:5432/SharedServices`.

If you want the SAS Deployment Wizard to automatically configure and load tables, then confirm that the user account can perform the query `select 1` successfully before you start the SAS Deployment Wizard.

---

**SQL Server**

Before deploying SAS 9.4, you must have a database instance and user ID with permission to access and create tables.

*Note:* Do not create the database. The SAS Deployment Wizard issues the `CREATE DATABASE` statement when it runs.

Use the SQL Server Installation Center to create a database instance. Configure it to use mixed mode authentication.

Next, use `sqlcmd` to log on to the instance with the `sa` account and create the `sharedservices` user. The commands that you would enter would be similar to the following:

```sql
use master
go
create login sharedservices with password = 'password'
go
create user sharedservices for login sharedservices
```

For more information about how to create a user ID and assign permissions, see your SQL Server documentation.

If your DBA is going to manage the Sharedservices database, the `sharedservices` user must be added to the `db_datawriter` role:

```sql
alter role db_datawriter add member sharedservices
```

If the `sharedservices` user is going to manage the Sharedservices database, the `sharedservices` user must be added to the `db_owner` role:

```sql
alter role db_owner add member sharedservices
```

You must install the latest compatible version of the JDBC drivers from Microsoft on the machine that is hosting the SAS Web Application Server. The SAS Deployment Wizard configures the SAS Web Application Server with a JDBC data source that uses a URL that is similar to the following example: `jdbc:sqlserver://host:1433;databaseName=SharedServices`.

If you want the SAS Deployment Wizard to automatically configure and load tables, then before you start the SAS Deployment Wizard, confirm that the user account can do the following:

- use the master database
- issue a `CREATE DATABASE` statement
- perform the query `select 1`
Configure an Alternative Database

During SAS 9.4 deployment, to configure the SAS Web Infrastructure Platform to use an alternative database, follow these steps:

Note: The instructions in this topic are meant to be used in conjunction with “Install and Configure SAS Interactively” on page 90.

1. Make sure that the alternative database that you are intending to use has been tested. For more information, see “Tested Databases” on page 210.

2. Make sure that you have prepared your database. For more information, see “Preparing to Configure an Alternative Database” on page 211.

3. Make sure that you have adequately prepared your system for deploying SAS 9.4, and that you have started the SAS Deployment Wizard using the instructions found in “Install and Configure SAS Interactively” on page 90.

4. On the Select Configuration Prompting Level page, select Custom for the prompting level.


6. On the SAS Web Infrastructure Platform Database: Data Server page, choose the alternative database that you want to use from the Database Type drop-down list.
7. Follow the instructions for the remaining deployment wizard configuration prompts found in “Install and Configure SAS Interactively” on page 90.

Later, the SAS Deployment Wizard prompts you for additional information about your database, including a database user ID and password. The user ID that you specify must have the ability insert, update, and delete database records. For more information, see “SAS Web Infrastructure Platform Data Server” on page 108.
Appendix 5
Provisioning SAS on Windows

Provisioning Overview

Automation can be helpful when applying software updates to administrator desktops and rolling out new software to end users on their Windows desktop machines. This document describes how you can quietly deploy SAS 9.4 throughout your enterprise by using the SAS Deployment Wizard in conjunction with a third-party provisioning system such as LANDesk, Wise, Microsoft SCCM, Symantec Altiris, IBM Tivoli, BMC, and so on.

The methodology described in this document is the same regardless of which third-party provisioning system you decide to use.

Before you start, inventory your site and develop a list all of the SAS products that you need to provision.

Our recommendation for automating the process of adding and updating SAS software across your Windows enterprise consists of the following steps:

1. (Optional) Provision system requirements on page 218
2. Provision SAS on page 224
Step One: (Optional) Provision System Requirements

After you have a list of all the SAS products that you plan to roll out across your Windows enterprise, provision the necessary system requirements on which they depend.

Determine System Requirements

The system requirements document for SAS 9.4 is available at http://support.sas.com/resources/sysreq/.

However, if you already have the SAS 9.4 software that you plan to provision on-site, you can run the SAS Deployment Wizard to analyze your system and identify which system requirements you must install. When you run the deployment wizard with the -srwonly option, the wizard creates a batch file that contains a list of the commands required to install the necessary system requirements. You then add these commands to your provisioning system in order to roll out the system requirements for SAS across your Windows enterprise.


Tip Remember that you might need to create multiple system requirements batch files when there are target groups that have different needs for specific deployments. For example, you might have three groups with different product needs: Group A needs SAS Enterprise Guide only. Group B requires SAS Enterprise Guide and SAS Add-In for Microsoft Office. Group C requires only SAS Foundation. Depending on the SAS products involved, different groups can have different system requirements.

To run the deployment wizard to create a batch file of system requirements commands, follow these steps:

1. Make sure that the Windows operating systems that you are using support SAS 9.4. For more information, go here: http://support.sas.com/supportos/list.

2. Make sure that the machine that you choose for analyzing system requirements meets the following criteria:
   - It is a clean machine on which no SAS products have been installed.
     If a version of SAS is already installed on the machine on which you are recording, you might see different results in your response file than you would see on a clean machine. Consequently, your results are different when you attempt the installation.
   - It is a machine that is typical of machines that your end users use (for example, in its operating system, bitness, third-party software, drives, group policy, and so on.)

3. Log on to the machine with the SAS Installer account (or with an account that is a member of the Windows Administrators group).

4. Open a Windows command prompt and start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the following command: setup.exe -srwonly

You should see a welcome page similar to the following:
5. On the Select System Requirements Task page, select **List System Requirements to Install Later** and click **Next**.

The wizard does **not** install any of the system requirements when run with **–srwonly** and **List System Requirements to Install Later**. The wizard generates only a batch file that contains a list of commands to install system requirements.

6. Provide the information that the deployment wizard prompts you for.

7. On the Select Products to Install page, select the SAS products that you plan to roll out across your Windows enterprise.
8. On the pages that follow, make selections for such prompts as language and regional settings support. Provide any additional information that the deployment wizard prompts you for.

*Note:* Language and region settings can affect whether certain system requirements are needed on a particular machine.

9. At the **Deployment Summary** page, click **Start**.

When the deployment wizard is finished, the **Deployment Complete** page appears.

10. Review the **Deployment Complete** page.

The icons on this page indicate the following:
A green icon indicates that the particular system requirement was added to the batch file successfully.

A yellow icon indicates that the particular system requirement was not needed on this machine, based on the Windows version and the language and encoding selections made.

A red icon indicates that an error occurred when adding the particular system requirement to the batch file.

11. When you are finished, click Next.

The Additional Resources page appears and lists the location of the generated batch file under SAS System Requisite Batch File.
The wizard-generated batch file contains the following information:

- order number for which the system requirements check was performed
- Windows operating system for the machine
- list of SAS products on which the requirements check was performed

12. Click **Finish** to close the SAS Deployment Wizard.

13. Proceed to “Add the System Requirements Commands to Your Provisioning System”.

### Add the System Requirements Commands to Your Provisioning System

To add the system requirements commands to your provisioning system, follow these steps:

1. Using a text editor, open the batch file that the deployment wizard generated in “Determine System Requirements”.

   The batch file is named `SAS-order-number_sysreq_YYYY-MM-DD-HH-MM-SS.bat`, and resides in 
   ```
   \[drive\]:\Users\SAS Installer\AppData\Local\SAS \SASDeploymentWizard
   ```

2. Verify that the SAS Software Depot paths are accurate for each installation command, and that all machines on which you are provisioning SAS have access to these paths.

   **Note:** The commands contained in the batch file can be used on other machines than the one where the check was performed, but they should be used only with the same SAS software order, the same selected products, and on the same Windows operating system.

   Figure A5.1 illustrates a sample batch file to install system requirements generated by the deployment wizard.
3. Make sure the systems requirements commands work on your Windows machines in your enterprise environment.

4. Add these system requirements commands to your provisioning system.
   
   For more information, consult your provisioning system documentation.

5. Proceed to “Provision the System Requirements”.

**Provision the System Requirements**

To provision the system requirements throughout your Windows enterprise, follow these steps:

1. Run your provisioning system and deploy the SAS system requirements.

   Operating system reboots are not always required. However, reboots might be pending either from previous installations of products other than SAS or because one of the system requirements that you just installed requires a reboot.

   If you want to suppress a reboot, remove the Windows registry entries that cause reboots, such as `FileRenameOperations` or `PendingFileRenameOperations`. These entries are located here: 
   `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\SessionManager`.

2. After you provision the system requirements, rerun the deployment wizard without the `-srwonly` option. (For more information, revisit “Determine System Requirements” on page 218.)

   The Deployment Summary page should no longer list a systems requirements stage. Stage 1 should now read **Installation**. This verifies that your systems requirements commands worked properly and that no more system requirements are needed.
3. Proceed to “Step Two: Provision SAS”.

**Step Two: Provision SAS**

After you provision the system requirements, provision SAS.

**Record a Deployment Wizard Response File**

You run the SAS Deployment Wizard to record a response file that captures all of the necessary installation and configuration responses to prompts from the wizard. Later, your provisioning system runs the deployment wizard in quiet mode. The deployment wizard uses this response file to roll out SAS across your Windows enterprise.

Multiple response files might be necessary when there are target groups that have different needs for specific deployments.

For example, you might have three groups with different product needs: Group A needs SAS Enterprise Guide only. Group B requires SAS Enterprise Guide and SAS Add-In for Microsoft Office. Group C requires only SAS Foundation. It can be helpful to name the response files after the products being provisioned (for example, EG_response.properties) or name them to reflect the group (for example, Group-A_response.properties).

To record a deployment wizard response file, follow these steps:

1. Make sure that the machine that you choose to record the response file meets the following requirements:
   - It is a machine on which you have installed the necessary SAS system requirements.
   - It is a clean machine on which no SAS products have been installed.
If a version of SAS is already installed on the machine on which you are recording, you might see different results in your response file than you would see on a clean machine. Consequently, your results are different when you attempt the installation.

- It is a machine that is typical of machines that your end users use (for example, in its operating system, bitness, third-party software, drives, group policy, and so on.)

2. Log on to a machine that meets the requirements listed in step 1 with the SAS Installer account (or with an account that is a member of the Windows Administrators group).

You deploy SAS on this machine and in the process, record your responses to the deployment wizard to be reused later when you roll out SAS using the wizard in conjunction with your provisioning system.

3. Open a Windows command prompt and start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the following command:

   `setup.exe -record -responsefile "response-file-path\response-file"

   In this command, `response-file` is the name given to the response file, and `response-file-path` is the absolute path to the directory where the deployment wizard writes the response file. (You can name your response file whatever you like.)

   For example, you might enter a command similar to this:

   `setup.exe -record -responsefile "C:\deploy\response.txt"

   Tip: If you copied a command from a PDF file, be sure to delete the hyphen (-) that was copied and then manually retype the hyphen. For more information, see “Usage Note 37418: You must use a hyphen with command-line options in the SAS Deployment Wizard,” available at http://support.sas.com/kb/37/418.html

4. Provide the information that the deployment wizard prompts you for.

5. When the Additional Resources page appears, your deployment is complete. Click Finish to close the deployment wizard.
6. Proceed to “Test the Deployment Wizard Response File”.

**Test the Deployment Wizard Response File**

Before proceeding, it is important to test the SAS Deployment Wizard response file.

To test the deployment wizard response file, follow these steps:

1. Before proceeding, review the following SAS Note: “Problem Note 41966: Using the SYSTEM account with automated installations might result in error messages,” available at [http://support.sas.com/kb/41/966.html](http://support.sas.com/kb/41/966.html). (Note the information about the missing Documents folder under Windows 7 for the SYSTEM account.)

2. Make sure that the machine that you choose to test the response file meets the following requirements:
   - It is a machine on which you have installed the necessary SAS system requirements.
   - It is a clean machine on which no SAS products have been installed.
     
     If a version of SAS is already installed on the machine on which you are recording, you might see different results in your response file than you would see on a clean machine. Consequently, your results are different when you attempt the installation.
   - It is a machine that is typical of machines that your end users use (for example, in its operating system, bitness, third-party software, drives, group policy, and so on.)

     **Tip** Failure to locate a typical machine can result in a response file that works on the original machine but fails on target machines.

3. Log on to a machine that meets the requirements listed in step 3 with the SAS Installer account (or with an account that is a member of the Windows Administrators group).

4. Run the deployment wizard using the response file that you created earlier.

   Open a Windows command prompt and start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the following command:

   ```bash
   setup.exe -nomsupdate -responsefile "response-file-path\response-file"
   ```

   In this command, `response-file-path\response-file` is the absolute path and the name of the response file that you recorded earlier.

   **Important:** Do not use the `-nomsupdate` parameter if you have not provisioned the SAS system requirements. The `-nomsupdate` option directs the wizard not to re-install the system requirements.

5. Provide the information that the deployment wizard prompts you for.

   Verify that the installation and configuration is successful. This run is interactive and enables you to see any potential issues that might arise.

   **Tip** If you encounter problems with your response file, it is quicker to record it again than it is to manually edit the response file. If the response file is not edited correctly, you will spend more time editing and adjusting it than you would recording it again.

6. Proceed to “Construct a Quiet Installation Command”.
Construct a Quiet Installation Command

Your third-party provisioning system requires a command to run the SAS Deployment Wizard in quiet mode (that is, without user interaction). You run the deployment wizard in quiet mode on one of your target Windows machines in order to construct this command and also to test the command.

To run the SAS Deployment Wizard in quiet mode, follow these steps:

1. Make sure that the machine that you choose to construct a quiet installation command meets the following requirements:
   • It is a machine on which you have installed the necessary SAS system requirements.
   • It is a clean machine on which no SAS products have been installed.
   If a version of SAS is already installed on the machine on which you are recording, you might see different results in your response file than you would see on a clean machine. Consequently, your results are different when you attempt the installation.
   • It is a machine that is typical of machines that your end users use (for example, in its operating system, bitness, third-party software, drives, group policy, and so on.)

   **TIP** Failure to locate a typical machine can result in a response file that works on the original machine but fails on target machines.

2. Log on to a machine that meets the requirements listed in step 1 with the SAS Installer account (or with an account that is a member of the Windows Administrators group).

   You deploy SAS on this machine and, in the process, document the command that you used to run the deployment wizard. Later, you add this command to your provisioning system, so that the system can automatically deploy SAS across your Windows environment.

3. Open a Windows command prompt and start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the following command:

   ```cmd
   setup.exe -quiet -nomsupdate -silentstatus -responsefile "absolute-path-to-response-file\response-filename"
   ```

   Note the following deployment wizard options used in this command:
   • The **-quiet** option suppresses visual feedback from the wizard. (**-quiet** is required by **-silentstatus**.)
   • The **-nomsupdate** option directs the wizard **not** to re-install the system requirements.

   **Important:** Do not use the **-nomsupdate** parameter if you have not provisioned the SAS system requirements. The **-nomsupdate** option directs the wizard **not** to re-install the system requirements.
   • The **-silentstatus** option enables you to monitor the progress of the installation.

   **TIP** If your provisioning system monitors the setup.exe process or if the package is configured to run one program before another, add the **-wait** option to the installation command:

   ```cmd
   setup.exe -quiet -wait -nomsupdate -silentstatus -responsefile "absolute-path-to-response-file\response-filename"
   ```
file\response-filename". The -wait parameter causes setup.exe to remain resident.

4. Remember the command that you just issued in step 3, as you must add it to your provisioning system later.

5. When the wizard has completed deploying SAS, proceed to “Provision SAS”.

**Provision SAS**

In this final task, you add the command to launch the SAS Deployment Wizard in quiet mode (using the previously created response file) to your provisioning system. Run the provisioning system to roll out SAS across your Windows enterprise. For more information, consult your provisioning system documentation.

**Updating an Expired SAS License Used with Provisioning Software**

This topic discusses options for replacing an expired license in a known good SAS installation package deployed with provisioning software.

Option 1: Modify the SAS Deployment Wizard response file to reference the new license file.

- **Benefit:**
  You change only the response file. You do not have to alter the actual installation deployment package.

- **Procedure:**
  In your response file, update the value for SAS_INSTALLATION_DATA.
  For example:
  ```
  SAS_INSTALLATION_DATA=C:\Program Files\SASHome\licenses\SAS94_09HDSX_70068130_Win_X64_Wrkstn_Srv.txt
  ```

- **Best Practices:**
  - Make a backup of your response file before you modify it.
  - Test the new license file on one machine before you deploy it on every machine in your SAS environment.

Option 2: Rename the new SAS license file to the name of the expired license file.

- **Benefit:**
  No change is made to the response file or to the installation deployment package.

- **Procedure:**
  Delete your expired SAS license file.
  For example:
  ```
  del C:\Program Files\SASHome\licenses\SAS94_09HDSX_70068130_Win_X64_Wrkstn_Srv.txt
  ```
  Rename your new SAS license file to the name of the expired license file.
  For example:
move C:\Program Files\SASHome\licenses\ 
SAS94_09HDSX_35110889_Win_X64_Wrkstn_Srv.txt 
C:\Program Files\SASHome\licenses\ 
SAS94_09HDSX_70068130_Win_X64_Wrkstn_Srv.txt

• Best Practices:
  • Make a backup of your new SAS license file before you rename it.
  • Test the new license file on one machine before you deploy it on every 
    machine in your SAS environment.
Appendix 6

Uninstalling the SAS Intelligence Platform

Overview of Uninstalling the SAS Intelligence Platform

Remove software from machines deploying SAS 9.4 in the following order:

1. client-tier machines
2. middle-tier node machines
3. middle-tier machine
4. server-tier machines (compute servers)
5. metadata node machines
6. metadata server machine

To uninstall the SAS 9.4 Intelligence Platform, you need to perform the following steps —where applicable—on each machine in your deployment:

1. Unconfigure your SAS software.
   See “Removing a SAS Configuration” on page 197.
2. Stop SAS servers that are running.
   See “Stopping SAS Servers That Are Running” on page 232.
3. Uninstall your SAS software.
   See “Uninstalling Your SAS Software” on page 232.
4. Uninstall third-party software.
   See “Uninstalling Third-Party Software” on page 236.

Stopping SAS Servers That Are Running

Stop SAS Servers That Are Running on Windows
Before uninstalling any software on a machine, you must stop any SAS servers that are running there. To stop SAS servers running on Windows, follow steps:

• Log on to the machine as the SAS Installer user (the user account used to install the SAS Software) or as the Administrator (or as a user in the Administrators group).
• Run the Windows Services snap-in (Start ⇒ Control Panel ⇒ Administrative Tools ⇒ Services).
• Stop all of the SAS services that are running.

For more information, refer to your Microsoft Windows documentation.

Stop SAS Servers That Are Running on UNIX
Before uninstalling any software on a machine, you must stop any SAS servers that are running there. To stop SAS servers running on UNIX, follow steps:

• Log on to the machine as the SAS user.
• From the Lev1 SAS configuration directory, run the following command:
  
  sas.servers stop
  
  For example:

  /opt/SAS/Config/Lev1/sas.servers stop

Uninstalling Your SAS Software

Overview of Uninstalling Your SAS Software
SAS provides two methods for uninstalling:

• interactively
  
  Use the Uninstall SAS Software task in the SAS Deployment Manager.

• non-interactively
  
  • Run the SAS Deployment Manager silently using a response file.
  
  • Run the SAS Deployment Manager silently without using a response file.

Note: The SAS Deployment Agent is removed through a different task in the SAS Deployment Manager. Therefore, the deployment agents must be stopped and removed manually before uninstalling SAS. For more information, see the SAS
Uninstall SAS Interactively

To uninstall SAS software interactively using the SAS Deployment Manager user interface, perform these steps:

1. Make sure that you have stopped your SAS servers by following the instructions described in “Stopping SAS Servers That Are Running” on page 232.

2. Make sure that you are logged on as the SAS Installer user (the user account used to install the SAS Software) or as the Administrator (or a user in the Administrators group).

3. On the host machine for the products whose configurations you are removing, navigate to SAS-installation-directory/SASDeploymentManager/9.4 and launch sasdm.exe (Windows), sasdm.sh (UNIX), or sasdm.rexx (z/OS). On Windows, you can use the shortcut on the Start menu.

4. Select the language that you want the SAS Deployment Manager to use when it displays text.

   The SAS Deployment Manager splash screen appears.

5. On the Select Deployment Manager Task dialog box, choose Uninstall SAS Software and click Next.

   ![SAS Deployment Manager Task Selection](image)

   Select SAS Deployment Manager Task
   The SAS Deployment Manager provides tasks to help you manage your software deployment. Select the task you want to perform.

   The following tasks are available for this software deployment:

   - Administer Tasks
   - Update Passwords
   - Redeploy Web Applications
   - Deploy Web Applications
   - Remove Existing Configuration
   - Update SID File in Metadata
   - Manage SAS File Types
   - Update Host Name References
   - Apply Hot Fixes
   - Update Existing Configuration
   - Change Password

   Uninstall SAS Software
   Uninstall SAS Software from this machine.

   ![Uninstall SAS Software Task](image)

6. On the Select SAS Products to Uninstall dialog box, all SAS products are selected to be uninstalled. If there are any products that you want to retain, uncheck them. When you are finished, click Next.

   The deployment wizard scans your machine to determine whether any pre-existing SAS files are locked or do not have Write permission. If the wizard lists any files in the text box, then while the wizard is running, quit SAS and add Write permission to the files listed. When you are finished, click Next.
The Summary page appears.

7. If there are any products that you want to keep, click **Back** until to see the Select SAS Products to Uninstall page and deselect the products. Otherwise, click **Start**.

The deployment manager uninstalls the selected SAS products.

8. When you see the Deployment Complete page, click **Finish**.

The deployment manager closes.

9. Do the following, appropriate for your operating system:
   - On UNIX and z/OS:
For the SAS Installer account, delete the directory `$HOME/.SASAppData`.

Delete your SAS installation directory (SASHome).

On Windows:

- Delete your SAS configuration directory (for example, `C:\SAS\Config\Level1`).
- Delete all SAS Windows Start menu shortcuts for All Users and the SAS Installer user (for example, delete the SAS directory under `C:\Documents and Settings\All Users`).
- Delete the SAS directory under `\Users\SAS-Installer-ID\AppData\Local\SAS` for the SAS Installer user.
- Delete all SAS services definitions. For more information, refer to your Windows documentation.
- Delete the following Windows Registry keys:
  - `HKEY_LOCAL_MACHINE\SOFTWARE\SAS Institute Inc.\Common Data`
  - `HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\SAS Institute Inc.\Common Data`

**Uninstall SAS Non-Interactively (Silently)**

To uninstall SAS without interacting with a graphical user interface (silently), you have two options:

- Run the SAS Deployment Manager silently using a response file.

  For example:

  - On UNIX: `.\sasdm.sh -quiet -responsefile /myresponse_file`
  - On z/OS: `.\sasdm.rexx -quiet -responsefile /myresponse_file`
  - On Windows: `sasdm.exe -quiet -responsefile c:\myresponse_file`

  In order to create a response file, you must run the deployment manager and perform an uninstall using the `-record` option. This is similar to recording a response file for deploying SAS using the SAS Deployment Wizard. For more information, see “Automating the SAS Installation on Multiple Machines” on page 122.

- Run the SAS Deployment Manager silently without using a response file.

  For example:

  - On UNIX: `.\sasdm.sh -quiet -uninstallall`
  - On z/OS: `.\sasdm.rexx -quiet -uninstallall`
  - On Windows: `.\sasdm.exe -quiet -uninstallall`

  The advantage of uninstalling without a response file is that you run the deployment manager one time. Although, all SAS software on the machine is uninstalled; you cannot choose to uninstall a subset of SAS products. A single uninstall command also facilitates using the command in script files.
Uninstalling Third-Party Software

The SAS Intelligence Platform often uses third-party products. You can determine whether third-party software was deployed on a particular machine by reviewing your deployment plan file (plan.xml). To uninstall these products, use the same procedures that you used to uninstall your SAS software. (See “Uninstalling Your SAS Software.”)

The following table shows the main third-party products that are used with the SAS 9.4 Intelligence Platform.

Table A6.1  Third-party Software Typically Used with SAS

<table>
<thead>
<tr>
<th>Type of Product</th>
<th>Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling servers</td>
<td>• Platform Process Manager</td>
</tr>
</tbody>
</table>
**Glossary**

**authentication**
See client authentication.

**authentication domain**
a SAS internal category that pairs logins with the servers for which they are valid. For example, an Oracle server and the SAS copies of Oracle credentials might all be classified as belonging to an OracleAuth authentication domain.

**browser**
See web browser.

**client authentication (authentication)**
the process of verifying the identity of a person or process for security purposes.

**cluster**
a group of computers that participate in load balancing. Each computer in the cluster runs an object spawner that handles client requests for connections.

**component**
a self-contained, reusable programming object that provides some type of service to other components in an object-oriented programming environment.

**connection profile**
a client-side definition of where a metadata server is located. The definition includes a computer name and a port number. In addition, the connection profile can also contain user connection information.

**credentials**
evidence that is submitted to support a claim of identity (for example, a user ID and password) or privilege (for example, a passphrase or encryption key).

**daemon**
a process that starts and waits either for a request to perform work or for an occurrence of a particular event. After the daemon receives the request or detects the occurrence, it performs the appropriate action. If nothing else is in its queue, the daemon then returns to its wait state.

**data set**
See SAS data set.
data warehouse (warehouse)
a collection of pre-categorized data that is extracted from one or more sources for the purpose of query, reporting, and analysis. Data warehouses are generally used for storing large amounts of data that originates in other corporate applications or that is extracted from external data sources.

database management system (DBMS)
a software application that enables you to create and manipulate data that is stored in the form of databases.

database server
a server that provides relational database services to a client. Oracle, DB/2, and Teradata are examples of relational databases.

DBMS
See database management system.

deploy
to install an instance of operational SAS software and related components. The deployment process often includes configuration and testing as well.

deployment plan
information about what software should be installed and configured on each machine in a SAS deployment. A deployment plan is stored in a plan.xml file.

domain
a database of users that has been set up by an administrator by using a specific authentication provider such as LDAP or the host operating system. The domain name should be unique within your enterprise. For example, you should not have a Windows domain and a UNIX domain that are both named "SALES". See also authentication domain.

encryption
the conversion of data by the use of algorithms or other means into an unintelligible form in order to secure data (for example, passwords) in transmission and in storage.

Extensible Markup Language (XML)
a markup language that structures information by tagging it for content, meaning, or use. Structured information contains both content (for example, words or numbers) and an indication of what role the content plays. For example, content in a section heading has a different meaning from content in a database table.

foundation services
See SAS Foundation Services.

identity
See metadata identity.

Integrated Windows authentication (IWA)
a Microsoft technology that facilitates use of authentication protocols such as Kerberos. In the SAS implementation, all participating components must be in the same Windows domain or in domains that trust each other.

Internet Protocol Version 6 (IPv6)
a protocol that specifies the format for network addresses for all computers that are connected to the Internet. This protocol, which is the successor of Internet Protocol
Version 4, uses hexadecimal notation to represent 128-bit address spaces. The format can consist of up to eight groups of four hexadecimal characters, delimited by colons, as in FE80:0000:0000:0000:0202:B3FF:FE1E:8329. As an alternative, a group of consecutive zeros could be replaced with two colons, as in FE80::0202:B3FF:FE1E:8329.

**IPv6**

*See Internet Protocol Version 6.*

**IWA**

*See Integrated Windows authentication.*

**JAR (Java Archive)**

the name of a package file format that is typically used to aggregate many Java class files and associated metadata and resources (text, images, etc.) into one file to distribute application software or libraries on the Java platform.

**Java**

a set of technologies for creating software programs in both stand-alone environments and networked environments, and for running those programs safely. Java is an Oracle Corporation trademark.

**Java Archive**

*See JAR.*

**Java Database Connectivity (JDBC)**

a standard interface for accessing SQL databases. JDBC provides uniform access to a wide range of relational databases. It also provides a common base on which higher-level tools and interfaces can be built.

**Java Development Kit (JDK)**

a software development environment that is available from Oracle Corporation. The JDK includes a Java Runtime Environment (JRE), a compiler, a debugger, and other tools for developing Java applets and applications.

**JDBC**

*See Java Database Connectivity.*

**JDK**

*See Java Development Kit.*

**job**

a collection of SAS tasks that can create output.

**load balancing**

for IOM bridge connections, a program that runs in the object spawner and that uses an algorithm to distribute work across object server processes on the same or separate machines in a cluster.

**localhost**

the keyword that is used to specify the machine on which a program is executing. If a client specifies localhost as the server address, the client connects to a server that runs on the same machine.
login
a SAS copy of information about an external account. Each login includes a user ID and belongs to one SAS user or group. Most logins do not include a password.

metadata identity (identity)
a metadata object that represents an individual user or a group of users in a SAS metadata environment. Each individual and group that accesses secured resources on a SAS Metadata Server should have a unique metadata identity within that server.

metadata object
a set of attributes that describe a table, a server, a user, or another resource on a network. The specific attributes that a metadata object includes vary depending on which metadata model is being used.

middle tier
in a SAS business intelligence system, the architectural layer in which web applications and related services execute. The middle tier receives user requests, applies business logic and business rules, interacts with processing servers and data servers, and returns information to users.

migrate
to populate a new deployment of SAS software with the content, data, or metadata (or a combination of these) from an existing deployment. Migrating might include upgrading to a new software release, converting data or metadata, or other changes to ensure compatibility.

object
an entity that can be manipulated by the commands of a programming language. In object-oriented programming, an object is a compilation of attributes (object elements) and behaviors (methods) that describe an entity. Unlike simple data types that are single pieces of information (for example, int=10), objects are complex and must be constructed.

object spawner (spawner)
a program that instantiates object servers that are using an IOM bridge connection. The object spawner listens for incoming client requests for IOM services.

planned deployment
a method of installing and configuring a SAS business intelligence system. This method requires a deployment plan that contains information about the different hosts that are included in the system and the software and SAS servers that are to be deployed on each host. The deployment plan then serves as input to the SAS Deployment Wizard.

pre-installation checklist
a checklist that enumerates the tasks a customer must perform before installing the business intelligence platform. The primary task is to create a set of operating system user accounts on the metadata server host.

SAS Application Server
a logical entity that represents the SAS server tier, which in turn comprises servers that execute code for particular tasks and metadata objects.

SAS authentication
a form of authentication in which the target SAS server is responsible for requesting or performing the authentication check. SAS servers usually meet this responsibility
by asking another component (such as the server's host operating system, an LDAP provider, or the SAS Metadata Server) to perform the check. In a few cases (such as SAS internal authentication to the metadata server), the SAS server performs the check for itself. A configuration in which a SAS server trusts that another component has pre-authenticated users (for example, web authentication) is not part of SAS authentication.

**SAS configuration directory**
the location where configuration information for a SAS deployment is stored. The configuration directory contains configuration files, logs, scripts, repository files, and other items for the SAS software that is installed on the machine.

**SAS data set (data set)**
a file whose contents are in one of the native SAS file formats. There are two types of SAS data sets: SAS data files and SAS data views.

**SAS Deployment Manager**
a cross-platform utility that manages SAS deployments. The SAS Deployment Manager supports functions such as updating passwords for your SAS deployment, rebuilding SAS web applications, and removing configurations.

**SAS Deployment Wizard**
a cross-platform utility that installs and initially configures many SAS products. Using a SAS installation data file and, when appropriate, a deployment plan for its initial input, the wizard prompts the customer for other necessary input at the start of the session, so that there is no need to monitor the entire deployment.

**SAS Foundation Services (foundation services)**
a set of core infrastructure services that programmers can use in developing distributed applications that are integrated with the SAS platform. These services provide basic underlying functions that are common to many applications. These functions include making client connections to SAS application servers, dynamic service discovery, user authentication, profile management, session context management, metadata and content repository access, information publishing, and stored process execution. See also service.

**SAS installation data file**
See SID file.

**SAS installation directory**
the location where your SAS software is installed. This location is the parent directory to the installation directories of all SAS products. The SAS installation directory is also referred to as SAS Home in the SAS Deployment Wizard.

**SAS IOM workspace (workspace)**
in the IOM object hierarchy for a SAS Workspace Server, an object that represents a single session in SAS.

**SAS Management Console**
a Java application that provides a single user interface for performing SAS administrative tasks.

**SAS Metadata Server**
a multi-user server that enables users to read metadata from or write metadata to one or more SAS Metadata Repositories.
SAS OLAP Server
a SAS server that provides access to multidimensional data. The data is queried using the multidimensional expressions (MDX) language.

SAS Pooled Workspace Server
a SAS Workspace Server that is configured to use server-side pooling. In this configuration, the SAS object spawner maintains a collection of workspace server processes that are available for clients.

SAS Software Depot
a file system that consists of a collection of SAS installation files that represents one or more orders. The depot is organized in a specific format that is meaningful to the SAS Deployment Wizard, which is the tool that is used to install and initially configure SAS. The depot contains the SAS Deployment Wizard executable, one or more deployment plans, a SAS installation data file, order data, and product data.

SAS Stored Process Server
a SAS IOM server that is launched in order to fulfill client requests for SAS Stored Processes.

SAS Workspace Server
a SAS server that provides access to SAS Foundation features such as the SAS programming language and SAS libraries.

SAS/SHARE server
the result of an execution of the SERVER procedure, which is part of SAS/SHARE software. A server runs in a separate SAS session that services users’ SAS sessions by controlling and executing input and output requests to one or more SAS libraries.

SASHome directory
the location in a file system where an instance of SAS software is installed on a computer. The location of the SASHome directory is established at the initial installation of SAS software by the SAS Deployment Wizard. That location becomes the default installation location for any other SAS software that is installed on the same computer.

server context
a SAS IOM server concept that describes how SAS Application Servers manage client requests. A SAS Application Server has an awareness (or context) of how it is being used and makes decisions based on that awareness. For example, when a SAS Data Integration Studio client submits code to its SAS Application Server, the server determines what type of code is submitted and directs it to the correct physical server for processing (in this case, a SAS Workspace Server).

service
one or more application components that an authorized user or application can call at any time to provide results that conform to a published specification. For example, network services transmit data or provide conversion of data in a network, database services provide for the storage and retrieval of data in a database, and web services interact with each other on the World Wide Web. See also SAS Foundation Services.

servlet
a Java program that runs on a web server. Servlets are a complementary technology to applets, which run in web browsers. Unlike applet code, servlet code does not have to be downloaded to a web browser. Instead, servlets send HTML or other
appropriate content back to a browser or to another type of web-based client application.

**servlet container**
the component of a web server that manages the life cycle of servlets, mapping a URL to a particular servlet and ensuring that the URL requester has the correct access rights. All servlet containers must support HTTP as a protocol for requests and responses, but they can also support additional protocols such as HTTPS.

**SID file (SAS installation data file)**
a control file containing license information that is required in order to install SAS.

**single sign-on (SSO)**
an authentication model that enables users to access a variety of computing resources without being repeatedly prompted for their user IDs and passwords. For example, single sign-on can enable a user to access SAS servers that run on different platforms without interactively providing the user's ID and password for each platform. Single sign-on can also enable someone who is using one application to launch other applications based on the authentication that was performed when the user initially logged on.

**SOE**
*See* software order email.

**software order email (SOE)**
an email message, sent to a customer site, that announces arrival of the software and describes the order. It explains the initial installation steps and might also contain instructions for using Electronic Software Delivery (ESD), if applicable.

**spawner**
*See* object spawner.

**SSO**
*See* single sign-on.

**trusted user**
a privileged service account that can act on behalf of other users on a connection to the metadata server.

**unrestricted identity**
a user or group that has all capabilities and permissions in the metadata environment due to membership in the META: Unrestricted Users Role (or listing in the adminUsers.txt file with a preceding asterisk).

**update mode**
an operating state of the SAS Deployment Wizard in which users are required to install software updates before they can perform any other deployment tasks. The SAS Deployment Wizard automatically goes into update mode when it determines that the current SAS order contains new versions or maintenance updates to the deployed products in a given SAS installation directory.

**upgrade**
a type of software update that introduces new functionality. An upgrade generally involves a new release number.
warehouse
See data warehouse.

web application
an application that is accessed via a web browser over a network such as the Internet or an intranet. SAS web applications are Java Enterprise Edition (JEE) applications that are delivered via web application archive (WAR) files. The applications can depend on Java and non-Java web technologies.

web authentication
a configuration in which users of web applications and web services are verified at the web perimeter, and the metadata server trusts that verification.

web browser (browser)
a software application that is used to view web content, and also to download or upload information. The browser submits URL (Uniform Resource Locator) requests to a web server and then translates the HTML code into a visual display.

Web Distributed Authoring and Versioning (WebDAV)
a set of extensions to the HTTP protocol that enables users to collaboratively edit and manage files on remote web servers.

WebDAV
See Web Distributed Authoring and Versioning.

WebDAV server
an HTTP server that supports the collaborative authoring of documents that are located on the server. The server supports the locking of documents, so that multiple authors cannot make changes to a document at the same time. It also associates metadata with documents in order to facilitate searching. The SAS business intelligence applications use this type of server primarily as a report repository. Common WebDAV servers include the Apache HTTP Server (with its WebDAV modules enabled), Xythos Software's WebFile Server, and Microsoft Corporation's Internet Information Server (IIS).

workspace
See SAS IOM workspace.

XML
See Extensible Markup Language.
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