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Performing Pre-installation Tasks

Pre-installation Steps

Before you install SAS Decision Manager, be sure to review the Pre-installation Checklist that is provided with your deployment plan. This checklist provides a detailed list of the pre-installation requirements. It also enables you to record important information that you need when you are installing the software.

Perform the following steps before you install SAS Decision Manager:

1. Verify that your system meets the minimum requirements. See the system requirements documentation on support.sas.com.

2. **Determine the database that you want to use.**

   **Note:** The SAS Decision Manager Common Data Server is always configured. Even if you use Oracle for the SAS Decision Manager database, you will be prompted for information for the SAS Decision Manager Common Data Server. After your system is configured and running, you can stop the SAS Decision Manager Common Data Server.

3. **Determine the time zone requirements.** You might need to synchronize the time zones that are specified in all of your operating environments.

4. Complete the pre-installation steps for your database. See “Pre-installation Tasks for SAS Decision Manager Common Data Server” on page 2 or “Pre-installation Tasks for an Oracle Database” on page 3.

5. (Optional) If you plan to configure the SAS Decision Manager Common Data Server for high availability, gather information about the high-availability cluster. For information, see the technical paper Managing SAS® Web Infrastructure Platform Data Server High-Availability Clusters on UNIX.
**Determine the Database to Use**

You can use either Oracle or the SAS Decision Manager Common Data Server for the SAS Decision Manager database.

The SAS Decision Manager Common Data Server is based on PostgreSQL 9.5. For more information, see “SAS Web Infrastructure Platform Data Server” in SAS Intelligence Platform: Middle-Tier Administration Guide at http://support.sas.com/documentation/intellplatform/index.html. Ensure that you have the information that is recorded in “Pre-installation Tasks for SAS Decision Manager Common Data Server” on page 2.

SAS Decision Manager supports Oracle 11g and Oracle 12c for the SAS Decision Manager database. For Oracle, complete the tasks described in “Pre-installation Tasks for an Oracle Database” on page 3.

**Determine Time Zone Requirements**

All of your operating environments (on all tiers in a multi-tier environment) must be set to the same time zone only if your site meets both of these conditions:
- You will deploy rule flows by using SAS Real-Time Decision Manager.
- Those rule flows use terms of type Date or Datetime.

SAS Real-Time Decision Manager uses a custom data type that accounts for differences between time zones when it performs calculations. If the time zones do not match across all of your environments, you should not use Date or Datetime data types in rule flows.

**Pre-installation Tasks for SAS Decision Manager Common Data Server**

During the installation and configuration of SAS Decision Manager, the SAS Deployment Wizard requires information about the database that SAS Decision Manager uses.

The SAS Decision Manager Common Data Server (based on PostgreSQL 9.5) is always configured when you run the SAS Deployment Wizard. You need the information in the following table in order to complete the steps in the SAS Deployment Wizard.

<table>
<thead>
<tr>
<th>Property</th>
<th>Record Information Here</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Type</td>
<td></td>
<td>Specifies the database type to use for the SAS Decision Manager database. Select SAS Decision Manager Common Data Server.</td>
</tr>
<tr>
<td>Database Name</td>
<td></td>
<td>Specifies the database name. The default name for the database is dcmdb.</td>
</tr>
</tbody>
</table>
Property | Record Information Here | Description
--- | --- | ---
Database User | Specifies the user name for the database administrator. This user owns the database and has superuser privileges. The default user name is `dcmdbowner`.
Database Password | Specifies a password for the user ID that is associated with the database account.
Port | Specifies the port that is used by the database. The default port for SAS Decision Manager Common Data Server is 10482.
Host Name | Specifies the fully qualified host name of the server on which the database is installed.
User ID | Specifies the user name for the user whose credentials are to be used to access the SAS Decision Manager Common Data Server database. The default user name is `dcmdb`.

For database-specific information about configuring a database, see [SAS Intelligence Platform: Installation and Configuration Guide](#).

---

**Pre-installation Tasks for an Oracle Database**

**Oracle Pre-installation Tasks**

When you use Oracle for your SAS Decision Manager database, perform the following steps before you install SAS Decision Manager:

1. Verify that you have the correct JDBC drivers.
2. Verify that you have a `tnsnames.ora` file for your Oracle client that corresponds to your database.
3. Determine the required database information.
   - **Note:** The SAS Decision Manager Common Data Server is always configured. Even if you use Oracle for the SAS Decision Manager database, you will be prompted for information for the SAS Decision Manager Common Data Server. See “Pre-installation Tasks for SAS Decision Manager Common Data Server” on page 2 for more information.
4. Specify the required database privileges.
5. Test the connection to your database.

**Verify JDBC Drivers for Oracle**

Verify that you have the correct JDBC drivers. To ensure proper installation of SAS Decision Manager, the drivers must be on each middle-tier server, and they must be in a directory that does not contain any other files.

Determine the Information Required for the Oracle Database

During the installation and configuration of SAS Decision Manager, the SAS Deployment Wizard requires information about the Oracle database that SAS Decision Manager uses. Record the information in the following table.

You enter this information in the SAS Decision Manager Database Properties and SAS Decision Manager Database JDBC Properties windows.

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Record Information Here</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Name</td>
<td>Specifies the fully qualified host name of the server on which the database is installed.</td>
<td></td>
</tr>
<tr>
<td>Port</td>
<td>Specifies the port number that is used by the database. The default port for Oracle is 1521.</td>
<td></td>
</tr>
<tr>
<td>Directory containing JDBC driver jars</td>
<td>Specifies the location of the database vendor’s JDBC JAR file. This file must be available on the middle tier and on any machine on which you are deploying SAS Decision Manager in order to configure SAS Decision Manager database. See “Verify JDBC Drivers for Oracle” on page 3 for more information.</td>
<td></td>
</tr>
</tbody>
</table>
| Database SID or Service Name | Specifies the Oracle database name. The database name must match either the service name or the Oracle site identifier (SID), both of which can be found in the tnsnames.ora file. For example: 

(CONNECT_DATA = (SERVICE_NAME = mydb))

(CONNECT_DATA = (SID = mydb))

You can also find the Oracle SID by running the following query using a database user ID on your Oracle instance:

```sql```
select instance from v$thread
```

Note: If you select **Use Oracle database name as a Service Name**, then you must enter the service name that is specified in the tnsnames.ora file.


<p>| User ID | Specifies the user ID of the database user whose credentials are used to access SAS Decision Manager data on the server. | |
| Password | Specifies the password of the user ID whose credentials are used to access SAS Decision Manager data on the server. | |</p>
<table>
<thead>
<tr>
<th>Prompt</th>
<th>Record Information Here</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schema Pattern</td>
<td></td>
<td>Specifies the schema name for the database. The default schema name is the same as the user ID.</td>
</tr>
</tbody>
</table>

**Specify the Required Database Privileges for Oracle**

Ensure that the users of your database have the required database privileges. Here are the required privileges for Oracle databases:

- CONNECT
- CREATE SESSION
- RESOURCE
- CREATE TABLE
- CREATE VIEW
- CREATE SEQUENCE
- CREATE TRIGGER
- UNLIMITED TABLESPACE

Note: The UNLIMITED TABLESPACE privilege is automatically granted for Oracle Database 11g but not for Oracle Database 12c.

**Test the Connection to Your Oracle Database**

Execute a command from the terminal to verify that your Oracle database is set up. For example, execute the following command using SQL*Plus:

```
sqlplus USER/PASSWORD@ORACLE_SID
```

You must be able to execute this command from any directory. If you are able to execute a database command such as this only from the database installation directory, then verify that the PATH variable is set up correctly. The database client application must be installed and available on the path specified by the PATH variable.
Installing SAS Decision Manager

Products Installed with SAS Decision Manager

Running the SAS Deployment Wizard
  About Running the SAS Deployment Wizard
  Select the SAS Application Server
  Configure the Database
  Create and Load Tables through the SAS Deployment Wizard

Products Installed with SAS Decision Manager
Your deployment plan for SAS Decision Manager includes additional SAS products that support and complement SAS Decision Manager functionality. See the software order email or the ordersummary.html file that is in your SAS Software Depot at software_depot/install_doc/order_number/ordersummary.html. The SAS Deployment Wizard prompts you to install and configure each of the products in your deployment plan.

Running the SAS Deployment Wizard

About Running the SAS Deployment Wizard
To run the SAS Deployment Wizard, follow the instructions in “Install and Configure SAS Interactively” in SAS Intelligence Platform: Installation and Configuration Guide.

Note: You can run the wizard on operating systems that do not use a windowing environment. For more information, see SAS Deployment Wizard and SAS Deployment Manager: User's Guide at http://support.sas.com/documentation/installcenter/94/index.html.

The type and number of configuration-related pages that you see depend on certain things. Namely, the prompt level that you choose, the SAS tier that you are currently deploying, and the contents of your SAS 9.4 custom order. The following topics provide information for prompts that are specific to SAS Decision Manager. For additional information about any of the SAS Deployment Wizard prompts, see the online Help for the wizard page in question.

Select the SAS Application Server
In this case you are installing SAS Decision Manager as an add-on product and have already defined other SAS application servers. The SAS Deployment Wizard asks you to select which application server you want to use. Select an application server other than SASMETA.
Configure the Database

During deployment of SAS Decision Manager on SAS 9.4, the SAS Deployment Wizard creates and configures the database tables in the SAS Decision Manager Common Data Server database by default. This database uses the PostgresSQL database management system.

You can use a third-party database server with SAS 9.4. In SAS 9.4, Oracle is the only other third-party database management system that is supported for the SAS Decision Manager database. For information about which versions of the alternative databases are supported, see “Reviewing Third-Party Database Requirements” in SAS Intelligence Platform: Installation and Configuration Guide.

The SAS Deployment Wizard prompts you to enter the information that you gathered when you completed the pre-installation tasks for your database. See “Pre-installation Tasks for SAS Decision Manager Common Data Server” on page 2 and “Pre-installation Tasks for an Oracle Database” on page 3 for more information.

For database-specific information about configuring a database, see SAS Intelligence Platform: Installation and Configuration Guide.

Create and Load Tables through the SAS Deployment Wizard

If you select SAS Decision Manager Common Data Server as the database type, the database tables are automatically created and loaded during the installation and configuration process for the SAS Decision Manager Common Data Server. The default name for the database is dcmdb.

If you select Oracle as the database type, the Automatically create tables and load data check box in SAS Deployment Wizard is enabled. If you want the Oracle database tables to be created and loaded automatically, leave this box selected. If you want to create the tables yourself, then clear the check box, and submit the necessary SQL statements after the wizard finishes running. See “Create Oracle Database Tables” on page 20 for more information.
Performing Post-installation Tasks

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<th>Page</th>
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</thead>
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<tr>
<td>Update User Passwords for Local User Service</td>
<td>11</td>
</tr>
<tr>
<td>Create Users and Assign Permissions</td>
<td>12</td>
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<tr>
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<td>12</td>
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<tr>
<td>- About the User Accounts for SAS Decision Manager</td>
<td>12</td>
</tr>
<tr>
<td>- Using Operating System Groups to Assign Permissions</td>
<td>13</td>
</tr>
<tr>
<td>- Create Windows Operating System Accounts and Groups for Users</td>
<td>13</td>
</tr>
<tr>
<td>- Create UNIX Operating System Accounts and Groups for Users</td>
<td>14</td>
</tr>
<tr>
<td>Verify WebDAV Folder Permissions for User-Defined Templates</td>
<td>15</td>
</tr>
<tr>
<td>Add a New Workspace Server and Create a SAS Application Server Context</td>
<td>17</td>
</tr>
<tr>
<td>Extend Support for Double-Byte Characters in Table and Variable Names</td>
<td>18</td>
</tr>
<tr>
<td>Create Oracle Database Synonyms</td>
<td>19</td>
</tr>
<tr>
<td>Create Oracle Database Tables</td>
<td>20</td>
</tr>
<tr>
<td>Verify the Certificate</td>
<td>20</td>
</tr>
<tr>
<td>Configure Your Deployment for HTTPS</td>
<td>21</td>
</tr>
<tr>
<td>Configure Your Deployment for Single Sign-On Web Authentication</td>
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</tr>
<tr>
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<td>33</td>
</tr>
<tr>
<td>- Decision Manager Advanced Properties</td>
<td>34</td>
</tr>
</tbody>
</table>
Post-installation Configuration and Verification Steps

After you install SAS Decision Manager using SAS Software Depot, you must perform additional configuration steps before you can use SAS Decision Manager.

1. Verify that all installation and configuration steps in the Instructions.html file have been completed. The Instructions.html file is located in \SAS-configuration-directory\Lev\Documents\doc. Follow the instructions that are provided in this file.

2. If you used the SAS Deployment Manager to update passwords for the SAS Administrator and SAS Trusted User, you must also update the users’ passwords for SAS Model Manager 14.3 Local Services. Do this before you sign in to the SAS Decision Manager web application. For more information, see “Update User Passwords for Local User Service” on page 11.

3. Create application users and assign permissions.

4. Verify that the WebDAV folder permissions are set appropriately to allow authorized users to create and edit user-defined templates.

5. (Optional) SAS Decision Manager supports the use of multiple SAS Application Servers to be used as part of a performance definition, a scoring test, or a model retrain definition. You can use a SAS Application Server context other than the default SASApp. To set up a non-default context, you must add a new workspace server and create a new SAS Application Server context using the SAS Deployment Wizard. For more information, see “Add a New Workspace Server and Create a SAS Application Server Context” on page 17.

6. (Optional) If you are using the SAS Decision Manager Common Data Server for the SAS Decision Manager database, you can configure the data server for high availability. For instructions, see the technical paper Managing SAS Web Infrastructure Platform Data Server High-Availability Clusters on UNIX.

7. If you are using a locale where national characters or if multi-byte characters are used in table names or variable names, you must extend naming support for double-byte characters. For more information, see “Extend Support for Double-Byte Characters in Table and Variable Names” on page 18.

8. (Optional) Run the scripts to create Oracle synonyms in the database if you do not want to use the default Oracle schema.

9. If you cleared the Automatically create tables and load data check box during installation, then you must manually create and load the Oracle database tables for business rules data and modeling project metadata. The metadata includes history, job definitions, and job logs. For more information, see “Create Oracle Database Tables” on page 20.

10. (Optional) Configure your deployment for single sign-on web authentication.

11. In order to publish models from SAS Decision Manager to a database for scoring, additional configuration steps are required to prepare the database. For more information, see “Preparing a Data Management System for Use with SAS Model Manager” in SAS In-Database Products: Administrator’s Guide.
If your system is configured for Kerberos authentication for Hadoop or Teradata, each user must have a valid Kerberos ticket. You must also complete post-installation configuration steps to enable users to publish models from the SAS Decision Manager web application. For more information, see “Configure Users Authenticated by Kerberos for Publishing Models” on page 22.

Verify that the Certificate Authority certificate is available.

(Optional) Configure your deployment to use HTTPS.

(Optional) Add the Visual Analytics: Data Building and Data Management: Lineage roles to the Decision Manager Users group. See “Administering Group and Role Membership” on page 55 for more information. These roles enable users to run SAS Visual Data Builder and view lineage information for rule flows and models.

(Optional) Configure SAS Workflow.

Configure the Decision Builder testing directory.

(Optional) Configure SAS Micro Analytic Service to support Python code. If your decisions run code that is written in Python, you must configure SAS Micro Analytic Service in order to be able to test the decisions in Decision Builder. See SAS Micro Analytic Service: Programming and Administration Guide for information about configuring a SAS Application Server to support the DS2 PyMAS package.

Verify the configuration of the dashboard reports directory on the SAS Workspace Server.

Configure the Model Manager Java Services Options.

(Optional) Configure the limit for the number of observations for a scoring result set.

Review application properties in SAS Management Console.

(Optional) Modify log file settings.

(Optional) If you are using Oracle for the SAS Decision Manager database, you can choose to stop the SAS Decision Manager Common Data Server.

Create libraries and register tables in SAS Management Console.

(Optional) If you have a license for SAS Factory Miner and want to integrate with SAS Decision Manager to be able to register models to the model repository, see SAS Factory Miner: Administration and Configuration.

For more information about post-installation tasks, see SAS Intelligence Platform: Installation and Configuration Guide.

Update User Passwords for Local User Service

If you used the SAS Deployment Manager to update passwords for the SAS Administrator and SAS Trusted User, you must also update the users’ passwords for SAS Model Manager 14.3 Local Services. For more information, see “Update a Managed Password” in SAS Intelligence Platform: Security Administration Guide.

To update the users’ passwords:

1. Log on to SAS Management Console as a SAS administrator.

2. On the Plug-ins tab, navigate to Foundation Services Manager ➤ SASModelManager14.3 Local Services ➤ Core.

3. Right-click User Service and select Properties.
4 Click the **Service Configuration** tab and then click **Configuration**.
5 Select a user ID from the list and click **Edit**.
6 Modify the user's password and click **OK**.
7 Repeat steps 5 and 6 for each user.
8 Click **OK**.
9 For changes to take effect, you must restart the web application server, such as **SAS [Config-Lev1] WebAppServer SASServer11_1**.

---

## Create Users and Assign Permissions

The SAS Deployment Wizard does not create application users by default. The SAS Administrator must create users in SAS Management Console with the appropriate group and role permissions. Make sure that all users are granted the appropriate permissions to the SAS Workspace Server. For more information, see “Administering SAS Identities for Users” on page 50.

In a Windows environment, each user or group must be granted permission to the **Log on as a batch job** local security policy. This permission is required in order to access functionality in the Data category. For more information, see “Create Windows Operating System Accounts and Groups for Users” on page 13.

In a UNIX environment, all SAS Decision Manager users must be part of a group that has the appropriate group permissions. For more information, see “Create UNIX Operating System Accounts and Groups for Users” on page 14.

---

## Creating Operating System Accounts for Product Administrators and Users

### About the User Accounts for SAS Decision Manager

SAS Decision Manager provides two types of user accounts:

**Product administrator**

A SAS Decision Manager administrative user is specific to SAS Decision Manager. A product administrator account is not the same as a general administrator account, such as the SAS Administrator (sasadm@saspw). These users must have a valid host operating system account, and you must associate that account with a metadata user.

**Users of SAS Decision Manager**

These users must have a valid host operating system account, and you must associate that account with a metadata user through SAS Management Console.

You must create the operating system account for the administrator and for regular user accounts as a post-installation task. For more information, see the following topics:

- “Create Windows Operating System Accounts and Groups for Users”
- “Create UNIX Operating System Accounts and Groups for Users”
- “Administering SAS Identities for Users”
**Using Operating System Groups to Assign Permissions**

Users have different operating system privileges on the SAS Workspace Server. By defining a user group for SAS Decision Manager, you can assign all users to the same group and grant the same permissions to all users at one time. All SAS Decision Manager users must have Read, Write, and Execute permissions for each environment directory that a user is permitted to use. Users also need permissions to all of the files and directories in an environment directory. The operating system must be configured to grant these permissions when new files and directories are created. The steps that you follow to do this depend on which operating system groups are defined and your site’s security policies.

**Create Windows Operating System Accounts and Groups for Users**

On the SAS Workspace Server, create an operating system account for the administrator of SAS Decision Manager and all SAS Decision Manager users.

If the SAS Workspace Server is running in the Windows operating environment and you are using an LDAP server to manage your users, define the user. An example is `domain\username` on the Active Directory server.

If the SAS Workspace Server is running in the Windows operating environment and you are working on a local machine, complete these steps to create this user account:

1. Right-click the Computer icon on your desktop and select Manage. The Computer Management window appears.
   
   **Note:** If you are creating users on a server, you can use the Server Manager.

2. In the left navigation pane, expand the Local Users and Groups node. The Users and Groups nodes appear.

3. Right-click the Users node and select New User. The New User window appears.

4. In the New User window, complete these tasks:
   
   - Specify a user name and password.
     
     **Note:** In Windows, you cannot enter `\username` (you enter the user name only). In the SAS Deployment Wizard and SAS Management Console, you must enter `\username`.
   
   - Clear the User must change password at next logon check box.
   
   - Select the User cannot change password check box.
   
   - Select the Password never expires check box.

   Click Create.

5. Click Close to close the New User dialog box.

6. If you want to add the users that you created to a group, perform the following steps:
   
   a. Right-click the Groups node in the Computer Management window, and select New Group.
   
   b. Click Add. Enter the user names, separated by semicolons, and click Check Names.
   
   c. Click OK.

7. Assign the security policy of Log on as batch job for each user or group.
   
From the Local Security Policy window, expand the Local Policies node and select User Rights Assignment. Then double-click the Log on as batch job policy.

Click Add user or Group. Enter the user names or group names, separated by semicolons, and click Check Names.

Click OK.

Create UNIX Operating System Accounts and Groups for Users

Conditions for the User Group

If you are working in a UNIX operating environment, the following conditions must be met:

- A group of users is created for the UNIX operating environment. The logon IDs for each user must be in this group. The group must also include any user who might run code that is created by SAS Decision Manager in a SAS session.
- Users can be members of multiple groups, but the SAS Decision Manager group is the primary group for each user.
- The SAS scripts are updated to grant permissions to the SAS Decision Manager users on the SAS Workspace Server. For more information, see “Update the SAS Scripts to Grant Permissions to the User Group” on page 14.
- Each environment directory has the correct ownership, and the user group has Read, Write, and Execute permissions.

Update the SAS Scripts to Grant Permissions to the User Group

Using the umask option, you can grant permissions to users on a conditional basis if the user is part of the SAS Decision Manager user group.

Note: This example might require changes to fit your server configuration. In particular, this example could result in changed permissions on other SAS files, such as OLAP cubes. You might be working with multiple UNIX groups and have a SAS OLAP Server. In this case you must ensure that the account under which the SAS OLAP Server runs has Read and Execute permissions to OLAP files.

To set these permissions:


2. Enter the configuration information for your operating environment. Here is the general format of this code:

   CMD=<your-operating-system-path>
   CURR_GID=`eval $CMD -g`
   GID=<solution-group-id>
   if [ $CURR_GID -eq $GID ]; then umask 002 fi

   a In the CMD=<your-operating-system-path>, specify the full path on your server where the ID command is stored. You can get this information by entering a which id or whence id command on your console.

   b In the GID=<solution-group-id>, specify the group ID. Type id on your console to get the GID and UID information.
A value of 002 is recommended for the umask option.

Here are code examples for each UNIX environment where SAS Decision Manager is supported:

<table>
<thead>
<tr>
<th>Operating Environment</th>
<th>Sample Code</th>
</tr>
</thead>
</table>
| AIX                   | CMD=/usr/bin/id  
CURR_GID='eval $CMD -g'  
GID=201  
if [ $CURR_GID -eq $GID ]; then umask 002  
fi |
| H64I (HP-Itanium)     | CMD=/usr/bin/id  
CURR_GID='eval $CMD -g'  
GID=201 if [ $CURR_GID -eq $GID ]; then umask 002  
fi |
| S64 (Solaris)         | CMD=/usr/xpg4/bin/id  
CURR_GID='eval $CMD -g'  
GID=201 if [ $CURR_GID -eq $GID ]; then umask 002  
fi |
| SAX (Solaris for X64) | CMD=/usr/xpg4/bin/id  
CURR_GID='eval $CMD -g'  
GID=201 if [ $CURR_GID -eq $GID ]; then umask 002  
fi |
| LNX (Linux)           | #!/bin/bash  
CMD=/usr/bin/id  
CURR_GID='eval $CMD -g'  
GID=500  
if [ "$CURR_GID" -eq "$GID" ]; then umask 002  
fi |

Verify WebDAV Folder Permissions for User-Defined Templates

During the SAS Decision Manager installation process, the ModelManager, sasfolders, and sasdav WebDAV folders are automatically created with default permissions on the SAS Content Server. If you migrated or upgraded from a previous release, the WebDAV folder permissions should be preserved. Use the SAS Content Server Administration Console (SCS Admin Console) to control access to an existing WebDAV folder.

Here are the default permissions for a new installation of SAS Decision Manager for the folder /ModelManager/ConfigTemplates/ext:

<table>
<thead>
<tr>
<th>Group</th>
<th>Permissions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>mdlmgrusers</td>
<td>Read</td>
<td>Model Manager Users group</td>
</tr>
<tr>
<td>mdlmgradminusers</td>
<td>Read, Write, and Delete</td>
<td>Model Manager Administrator Users group</td>
</tr>
</tbody>
</table>
In order to create new model and report templates, as well as edit existing user-defined templates, users must have Read and Write permissions to the `/ModelManager/ConfigTemplates/ext` folder.

To verify or modify the folder permissions for the `ext` folder:

1. Access the SAS Content Server Administration console by entering the following URL in your web browser and substituting the server name and port number of your SAS Content Server: `http://servername:port/SASContentServer/dircontents.jsp`.

   **Note:** The default port number for the SAS Web Application Server is 7980 for a UNIX environment and 80 for a Windows environment.

2. Sign in to the console as an unrestricted user (for example, SAS Administrator). The SCS Admin Console window appears.

3. Click `ModelManager` ➤ `ConfigTemplates`.

4. Click the permissions icon for the `ext` folder. The Permissions page appears.

5. Modify the permissions for the `mdlmgradvusers` principal to give Write permissions by changing the WRITE and INHERIT WRITE permissions to Yes.

   **Note:** It is recommended that you give Delete permissions only to the mdlmgradminusers group.

For more information, see “Modify Permissions for WebDAV Folders and Files” in SAS Intelligence Platform: Middle-Tier Administration Guide.
Add a New Workspace Server and Create a SAS Application Server Context

SAS Decision Manager on SAS 9.4 provides support for multiple SAS Application Servers that can be used when specifying a performance definition, a scoring test, or a model retrain definition.

To add a new workspace server to your SAS Decision Manager installation:

1. On the machine where the SAS Application Server was installed, start the SAS Deployment Wizard from the highest-level directory in your SAS Software Depot using the command file that is appropriate for your operating system. On Windows systems that command file is setup.exe. For UNIX systems, use setup.sh.

2. Select Install SAS Software. Click Next.

3. Select Perform a Planned Deployment, deselect Install SAS Software, and select only Configure SAS Software. Click Next.

4. You must use the same deployment plan that was used when you installed the original server component. This example uses one of the standard deployment plans. Choose Select a standard deployment plan, and select the appropriate Model Mgr plan for your machine configuration. Click Next.

5. Select the server machine on which you want to configure the SAS Application Server. Click Next.

6. On the Checking System page, click Next.

7. On the Select Configuration Prompting Level page, select Typical. Click Next.

8. On the Specify Configuration Information page, you must select the same options as your original installation. For this example, use the default settings. Click Next.

9. The SAS Deployment Wizard warns you that the configuration directory and level that you specified contain existing files. Select Yes.


11. On the Local Machine Name page, accept the default settings. Click Next.

12. On the Migration Information page, no migration should be performed. Click Next.


14. On the SAS Metadata Server page, accept the default settings. Verify that the SAS Metadata Server and port are valid. Click Next.

15. On the Deployment Accounts: Type of Accounts page, select Use SAS internal accounts when appropriate. Click Next.

16. On the SAS Internal Account: Unrestricted Administrator page, enter the same password that was used in the original installation. Click Next.

17. On the Deployment Accounts: First User page, there is no need to set up a first user ID. Click Next.


19. On the SAS Application Server: Server Context page, enter SASApp_2 in the field SAS Application Server Context Name. Click Next.
20 On the SAS Server Dependencies page, confirm that the value of **SAS Application Server Context** is **SASApp_2**. Click **Next**.

21 On the SAS Workspace Server page, enter the workspace server port. This example uses the default value, 8592. Click **Next**.

22 Select the deployment summary and click **Start**. When the SAS Deployment Wizard is finished, note the additional resources and click **Finish**.

Next you must configure the Job Execution Service and restart the SAS web application servers.

1. Run SAS Management Console and select the **Plug-ins** tab. Select **SAS Application Management** ⇒ **Configuration Manager** ⇒ **SAS Application Infrastructure** ⇒ **Web Infra Platform Services 9.4** ⇒ **JobExecutionService**.

2. Right-click **JobExecutionService** and select **Properties**.

3. Select the **Settings** tab in the **JobExecutionService Properties** window and locate the **Configure Execution Queues from Available Server Contexts** section.

4. Select the new server (for example, **SASApp_2**). Then move it to the **Selected** list.

5. In the **SASApp_2 Execution Queue Properties** section, clear **Enable for interactive execution?**.

6. Click **OK**.

7. Restart SAS servers, including the SAS Metadata Server and SAS Web Application Servers. For example, in a default Windows installation this can be done for Services from the Windows Management Console by restarting the Service name, such as **SAS [Config-Lev1] WebAppServer SASServer11_1**.

To verify your new server from SAS Decision Manager:

1. Sign in to SAS Decision Manager.

2. Create a scoring test that uses the new SAS Application Server context.

3. Execute the scoring test.

For more information, see:

- “Managing SAS Application Servers” in *SAS Intelligence Platform: Application Server Administration Guide*
- “Managing Workspace Servers and Stored Process Servers” in *SAS Intelligence Platform: Application Server Administration Guide*
- “Add a New Logical Server in an Existing SAS Application Server” in *SAS Intelligence Platform: Application Server Administration Guide*
- “Job Execution Service” in *SAS Intelligence Platform: Middle-Tier Administration Guide*

---

**Extend Support for Double-Byte Characters in Table and Variable Names**

If your locale contains national characters or multi-byte characters, you can extend naming convention support for tables that have a table name or that contain variable names with double-byte characters. After you extend support, you can register these tables using SAS Management Console and then add the registered tables in the **Data** category in SAS Decision Manager. You can view these tables and use them to create summary tables.
Tables with extended support for double-byte characters can also be used in models, model projects, and model portfolios, as well as in their associated tasks.

**Note:** SAS Decision Manager does not support the use of these tables in business rules or decisions.

To enable support for these types of tables:

1. Add the following lines to the `autoexec_usermods.sas` file.
   ```sas
   options validmemname=extend;
   options validvarname=any;
   ```
   For Windows environments, this file is located in the `\SAS-configuration-directory\Levn\SASApp\WorkspaceServer\` directory.
   For UNIX environments, this file is located in the `/SAS-configuration-directory/Levn/SASApp/WorkspaceServer/` directory.

2. Set the **Valid Variable Name Options** setting to **Yes** in SAS Management Console. For more information, see “Valid Variable Name Options” on page 27.

**Note:** Although the `VALIDMEMNAME=EXTEND` and `VALIDVARNAME=ANY` system options extend support for double-byte characters, blanks, and special characters, SAS Decision Manager does not fully support these options. Special characters and blanks in table names or variable names are not supported.

**See Also**
- Register Tables
- “Add Registered Tables From Metadata” in SAS Decision Manager: User’s Guide
- “VALIDMEMNAME= System Option” in SAS System Options: Reference
- “VALIDVARNAME= System Option” in SAS System Options: Reference

**Create Oracle Database Synonyms**

When you use Oracle for your SAS Decision Manager database, you might not want to use the default schema. In this case, you can run two SQL scripts to create synonyms for the database tables. These scripts are in `SASHome\SASDecisionManagerCommonDataServer\3.3\Config\Deployment\dbscript\Oracle\optional`.

Use your preferred Oracle tool to run these scripts. One of these scripts, `brm_grant_priv_synonym.sql`, uses substitution variables. If your Oracle tool does not support substitution variables, then you need to manually replace the variable with its value, as described in Step 2.

To run these scripts:

1. In the script named `brm_grant_priv_synonym.sql`, find the following line:
   ```sql
   def usernm='YOUR_USER_NAME';
   ```
   Replace `YOUR_USER_NAME` with the user ID that you are using to access the SAS Decision Manager database.

2. (Optional) If your Oracle tool does not support substitution variables, replace all occurrences of `&usernm` in the script named `brm_grant_priv_synonym.sql` with the user ID that you are using to access the database.

3. Run the script named `brm_create_synonym.sql` using your preferred Oracle tool. This script does not require substitution variables.

4. Run `brm_grant_priv_synonym.sql` using your preferred Oracle tool.
Create Oracle Database Tables

When you ran the SAS Deployment Wizard, the Automatically create tables and load data check box was selected by default for the SAS Decision Manager database. (See “Create and Load Tables through the SAS Deployment Wizard” on page 8.) If you cleared the Automatically create tables and load data check box and you do not have an existing database instance, you must run the SQL scripts to create and load the tables.

Run the CreateMMTables.sql script in order to create and load the model tables. The script is located in SASHome\SASModelManagerMidTier\14.3\Config\Deployment\Content\dbscript\oracle.

Run the following scripts to create the business rules tables with a compatible database client for your installation. These scripts are located in SASHome\SASDecisionManagerCommonDataServer\3.3\Config\Deployment\dbscript\oracle.

Before you run these scripts, replace @schema.name@ in each file with the schema name for your database.

1. brm_create_table.sql
2. brm_create_sequence.sql
3. brm_create_constraint.sql
4. brm_create_view.sql
5. brm_required_inserts.sql
6. edm_workflow_interface_create_table.sql
7. edm_workflow_interface_create_sequence.sql
8. edm_workflow_interface_create_constraint.sql
9. edm_workflow_interface_create_trigger.sql
10. edm_workflow_interface_required_inserts.sql
11. edm_create_table.sql
12. edm_create_constraint.sql
13. edm_create_sequence.sql
14. edm_required_inserts.sql
15. dcb_create_table.sql
16. dcb_create_constraint.sql
17. dcb_required_inserts.sql

Verify the Certificate

During installation and configuration of SAS 9.4, the SAS Deployment Wizard enables you to configure the SAS Web Server to use HTTPS and Secure Sockets Layer (SSL) certificates automatically. Verify that the Certificate Authority certificate is available to the truststore for the browser and Java clients such as SAS Workflow Studio and SAS Management Console. For more information, see the Instructions.html file in the directory \SAS-configuration-directory\Levy\Documents, and “Validate the Secured Middle-Tier Environment” in SAS Intelligence Platform: Middle-Tier Administration Guide.
If you did not use the SAS Deployment Wizard to configure the SAS Web Server to use HTTPS and SSL certificates, you can configure it manually. For more information, see “Configure SAS Web Server Manually for HTTPS” in SAS Intelligence Platform: Middle-Tier Administration Guide.

The communication path between SAS Web Server and SAS Web Application Server uses HTTP by default. You might have configured the SAS Web Server to use HTTPS by using the SAS Deployment Wizard. In this case you must complete additional steps in order to use HTTPS between SAS Web Server and SAS Web Application Server. For more information, see “Configure SAS Web Application Server for HTTPS” in SAS Intelligence Platform: Middle-Tier Administration Guide. If you configure the SAS Web Application Server to use HTTPS, see “Configure Your Deployment for HTTPS” on page 21 for additional instructions.

### Configure Your Deployment for HTTPS

The steps listed in “Configure SAS Web Application Server for HTTPS” in SAS Intelligence Platform: Middle-Tier Administration Guide change the communication path between the SAS Web Server and SAS Web Application Server to use HTTPS. If you completed those steps and configured the communication path to use HTTPS, then you must also configure the SAS Web Application Server to use HTTPS.

To configure the SAS Web Application Server to use HTTPS:

1. Edit the setenv file for your operating environment.

<table>
<thead>
<tr>
<th>Environment</th>
<th>File</th>
<th>Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIX</td>
<td>setenv.sh</td>
<td>/SAS-configuration-directory/Levn/Web/WebAppServer/SASServer7_1/bin</td>
</tr>
<tr>
<td>Windows</td>
<td>setenv.bat</td>
<td>\SAS-configuration-directory\Levn\Web\WebAppServer\SASServer7_1\bin</td>
</tr>
</tbody>
</table>

Add the following options to the JVM_OPTS line:

- Dbrm.midtier.use.https=true
- Ddcm.midtier.use.https=true

2. In Windows environments, edit the wrapper.conf file in the \SAS-configuration-directory\Levn\Web\WebAppServer\SASServer7_1\conf directory.

Add the following line to the Java Additional Parameters section:

```
wrapper.java.additional.n=-Dbrm.midtier.use.https=true
wrapper.java.additional.n=-Ddcm.midtier.use.https=true
```

The number n is the next number in the sequence of wrapper parameters.


**Note:** The options are needed only on SASServer7; they are not needed on SASServer11.
Configure Your Deployment for Single Sign-On Web Authentication

SAS 9.4 web applications can be configured to use single sign-on web authentication. For more information, see the steps in “Web Authentication” in SAS Intelligence Platform: Middle-Tier Administration Guide. After you complete those steps, an additional configuration is needed.

To configure SAS Decision Manager to use single sign-on web authentication:

1. Edit the setenv file for your operating environment.

| Environment | File       | Directory                                                                 
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIX</td>
<td>setenv.sh</td>
<td>/SAS-configuration-directory/Levn/Web/WebAppServer/SASServer11_1/bin</td>
</tr>
<tr>
<td>Windows</td>
<td>setenv.bat</td>
<td>\SAS-configuration-directory\Levn\Web\WebAppServer\SASServer11_1\bin</td>
</tr>
</tbody>
</table>

Add the following option to the JVM_OPTS line:

-DMMSingleSignOn=on

2. In Windows environments, edit the wrapper.conf file in the \SAS-configuration-directory\Levn\Web\WebAppServer\SASServer11_1\conf directory.

Add the following line in the Java Additional Parameters section:

wrapper.java.additional.\n=-DMMSingleSignOn=on

The number \n is the next number in the sequence of the wrapper parameters.

Note: If you are configured to use single sign-on web authentication by Kerberos for Teradata or Hadoop, you must add options to be able to publish models from SAS Decision Manager. Other database management systems are not supported for single sign-on authentication at this time. Before continuing to the next step, see “Configure Users Authenticated by Kerberos for Publishing Models” on page 22.


Note: The option is needed only on SASServer11; it is not needed on SASServer7.

Configure Users Authenticated by Kerberos for Publishing Models

To use Kerberos authentication, each SAS Decision Manager user must have a valid Kerberos ticket to access SAS Decision Manager. Users who are configured to use single sign-on web authentication by Kerberos for Teradata or Hadoop must also perform additional post-installation configuration steps so that they can publish models to a Teradata or a Hadoop Distributed File System (HDFS) from SAS Decision Manager:

You must also configure your deployment to use single sign-on web authentication by Kerberos for Teradata or Hadoop.
1. Edit the setenv file for your operating environment.

<table>
<thead>
<tr>
<th>Environment</th>
<th>File</th>
<th>Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIX</td>
<td>setenv.sh</td>
<td>`/SAS-configuration-directory/Levn/Web/</td>
</tr>
<tr>
<td></td>
<td></td>
<td>WebAppServer/SASServer11_1/bin</td>
</tr>
<tr>
<td>Windows</td>
<td>setenv.bat</td>
<td><code>\SAS-configuration-directory\Levn\Web\WebAppServer\SASServer11_1\bin</code></td>
</tr>
</tbody>
</table>

Add the following options to the JVM_OPTS line:

```
-Dmm.kerberized.hadoop=on
-Dmm.kerberized.teradata=on
```

Note: You can enable one or both options.

2. In Windows environments, edit the wrapper.conf file in the `\SAS-configuration-directory\Levn\Web\WebAppServer\SASServer11_1\conf` directory.

Add the following lines in the Java Additional Parameters section:

```
wrapper.java.additional.n=-Dmm.kerberized.hadoop=on
wrapper.java.additional.n=-Dmm.kerberized.teradata=on
```

The number `n` is the next number in the sequence of the wrapper parameters.

Note: You can enable one or both options.


Note: The option is needed only on SASServer11; it is not needed on SASServer7.

---

**Configure the Decision Builder Testing Directory**

The default directory for decision testing results is `\SAS-configuration-directory\Levn\AppData\DecisionBuilder\tests`. This directory path is specified by the Decision Manager 3.3 property `dcb.testlib.dir`.

Note: The testing results directory is automatically created when a user with the correct permissions runs the first decision test. The user must have Write permission to the `\SAS-configuration-directory\Levn\AppData` directory.

To configure the default testing results directory:

1. (Optional) Change the directory location specified by the `dcb.testlib.dir` Decision Manager advanced property. See “Review Application Properties in SAS Management Console” on page 31 for more information.

Note: Some deployments might have multiple application servers that are configured for Job Execution Service. In these cases it is possible for decision test results (log and output) to be saved separately from the code that is generated by a test. If a test runs successfully but the testing results are not available through the Decision Builder user interface, the results might be saved on a different server. To avoid this issue, change the `dcb.testlib.dir` property on each server to specify the testing results directory with a UNC path or a network location. The `dcb.testlib.dir` property on each server must specify the same directory.
If the directory that is specified by the `dcb.testlib.dir` property already exists, verify that users have Read, Write, and Execute permissions to that directory. If that directory does not already exist, verify that users have Read, Write, and Execute permissions to the `\SAS-configuration-directory\Levn\AppData` directory.

**Note:** In a UNIX environment, all users must be part of a group that has the appropriate group permissions. For more information, see “Create UNIX Operating System Accounts and Groups for Users” on page 14 and “Configuring Users, Groups, and Roles” on page 49.

---

**Configure the Dashboard Reports Directory**

In SAS Decision Manager, the dashboard reports directory is configured during installation. The default directory is `\SAS-configuration-directory\Levn\AppData\SASModelManager14.3\Dashboard`.

**Note:** When the SAS Web Application Server and the SAS Workspace Server are located on different physical machines, the Software Deployment Wizard creates a directory on the SAS Web Application Server machine and uses that value for the `App.DashboardDir` property value. You must create a directory that is accessible by the SAS Workspace server, and the SAS Decision Manager users must have permissions to that directory.

To configure a different directory to store the SAS Decision Manager dashboard reports:

1. Connect to the SAS Workspace Server.
2. Create a new directory (for example, `C:\Dashboard`).
   **Note:** The directory must be located on the SAS Workspace Server or on a network drive that is accessible by the SAS Workspace Server. Do not include special characters or spaces in the name of the directory.
3. Grant user permissions for the new directory. For example, perform the following tasks:
   - Grant Full Control permission to users who need to create subdirectories, write content, or delete content. This type of user includes a user who you will add (using SAS Management Console) to the Model Manager Administrator Users group or a user who is a SAS administrator.
   - Grant Read, Write, and Execute permissions to users who need to create performance indicators and execute dashboard reports. This type of user includes a user who you will add (using SAS Management Console) to the Model Manager Advanced Users group.
   - Grant Read and Execute permissions to users who need only to view the dashboard reports. This type of user includes a user who you will add (using SAS Management Console) to the Model Manager Users group.
   **Note:** In a UNIX environment all SAS Decision Manager users must be part of a group that has the appropriate group permissions. For more information, see “Create UNIX Operating System Accounts and Groups for Users” on page 14 and “Configuring Users, Groups, and Roles”.
4. From SAS Management Console, expand the Application Management node on the Plug-ins tab.
5. Select and expand Configuration Manager ➔ SAS Application Infrastructure ➔ Enterprise Decision Manager 3.3.
7. (optional) Click the Settings tab and then select Report Options. Use this setting to specify the styles that are available when a user generates dashboard reports, and to enable the indicator override option for defining dashboard report indicators. When you use the indicator override configuration, indicators with conditions are available when you add dashboard report indicators using SAS Decision Manager. For more information, see “Report Options” on page 25.
8 Click the **Advanced** tab to modify the application dashboard directory. Change the property value for `App.DashboardDir` to the directory path that was configured.

9 Click **OK**.

10 For changes to take effect, you must restart the SASServer11 web application server.

   **Note:** The option is needed only on SASServer11; it is not needed on SASServer7.

---

**Configuring Model Manager Java Services Options**

The **Model Manager Java Services Options** setting in SAS Management Console enables you to modify model management configurations. The configurations can be modified for reporting, for metadata tables usage when publishing a scoring function, for SAS code debugging, SAS system options, In-database connection and publishing options, and performance options for the SAS High-Performance Analytics procedures.

**Modify Java Services Options**

1 Log on to SAS Management Console as a SAS administrator.

2 On the **Plug-ins** tab, navigate to Application Management ➔ Configuration Manager ➔ SAS Application Infrastructure ➔ Enterprise Decision Manager 3.3.

3 Right-click **Model Manager JavaSvcs 14.3** and select **Properties**.

4 Click the **Settings** tab and then select **Model Manager Java Services**.

5 Select one of the following options to view and configure the available settings.
   - **Report Options**
   - **Publish Scoring Options**
   - **Debug Options**
   - **Valid Variable Name Options**
   - **In-Database Options**
   - **Performance Options**
   - **Factory Miner Options**

6 Click **OK**.

7 For changes to take effect, you must restart the SASServer11 web application server.

   **Note:** The option is needed only on SASServer11; it is not needed on SASServer7.

---

**Report Options**

The **Report Options** setting in SAS Management Console enables you to modify the SAS Decision Manager configurations for the dashboard reports, for model retrain reports, and for performance monitoring. These reports are available on the **Reports** page for a project in SAS Decision Manager.

To modify the report options setting:
1 Specify the formats that are available when a user creates model retrain reports. The default values are RTF, PDF, and HTML. You can remove any of the default values so that they are not available in SAS Decision Manager.

2 Specify the report styles that are available when a user creates the model retrain reports and dashboard reports. You can add or remove SAS styles. The default values are SAS default, Seaside, Meadow, and Harvest. For more information about SAS styles, see “Style Templates” in SAS Output Delivery System: User’s Guide.

3 Specify a value for a random seed to be used by performance definitions for models that have an interval target. The default value is 12345. The random seed is the initial seed for the random number generator used for sampling the input data set.

4 Specify a value for the sample size that is used by performance definitions for models that have an interval target. The default value is 1000. The sample size for models with an interval target is the number of observations from the input data set.

5 Specify a value for the sample size that is used by performance definitions for characteristic and stability analysis. The default value is 10000. The sample size for characteristic and stability analysis is the number of observations from the input data set.

6 Select Yes or No to specify whether to use the temporary tables on the High-Performance Analytics appliance for performance monitoring. The default is Yes.

7 Specify a value for the correlation coefficient (rho) that is used by the binomial test to estimate the probability of default (PD) levels. The default value is 0.04.

### Publish Scoring Options

The Publish Scoring Options setting enables you to indicate that the metadata tables be populated in the target database when publishing a scoring function. The default is Yes. During the installation and configuration process of the database, the metadata tables must be created in the database if this setting is set to Yes. If you plan to use only the SAS Embedded Process publish method to publish scoring model files, this setting can be ignored, and you do not need to create the metadata tables during the database configuration process.

For information about the database configurations, see “Preparing a Data Management System for Use with SAS Model Manager” in SAS In-Database Products: Administrator’s Guide. For more information about publishing models to a database, see “Publishing Models to a Database or Hadoop” in SAS Decision Manager: User’s Guide.

### Debug Options

The Debug Options setting enables you to use the debug options when executing SAS code within SAS Decision Manager. The default value is No.

However, the Debug Options setting does not work for scoring tests, performance definitions, and model retrain definitions. To enable debug options with scoring tests, you must add the following line of code to the appserver_autoexec_usermods.cfg file in the \SAS-configuration-directory\Levn\SASApp\WorkspaceServer\directory:

```plaintext
options mprint symbolgen mlogic;
```

Note: You can also add this code using the Edit Start-up Code feature in SAS Decision Manager. For more information, see “Edit Start-Up Code” in SAS Decision Manager: User’s Guide.
Valid Variable Name Options

The VALIDVARNAME= system option specifies the rules for valid SAS variable names that can be created and processed during a SAS session. The Valid Variable Name Options setting enables you to set the VALIDVARNAME system option to ANY when executing SAS code. To do this, you select Yes. The default value is No.

However, the Valid Variable Name Options setting does not work for scoring tests, performance monitoring, or retraining jobs. To use the VALIDVARNAME system option with these features, you must add the following line of code to the autoexec_usermods.sas file in the \SAS-configuration-directory\Lev\SASApp\WorkspaceServer\ directory:

```
options validvarname=any;
```

Note: You can also add this code using the Edit Start-up Code feature in SAS Decision Manager. For more information, see “Edit Start-Up Code” in SAS Decision Manager: User’s Guide.

When the VALIDVARNAME system option is set to V7, variable names with letters of the Latin alphabet, numerals, or underscores are valid. If you use any other characters, then you must express the variable name as a name literal, and you must also set VALIDVARNAME=ANY. If the name includes either the percent sign (%) or the ampersand (&), then you must use single quotation marks in the name literal in order to avoid interaction with the SAS Macro Facility. For more information, see “VALIDVARNAME= System Option” in SAS System Options: Reference.

Note: You must have set the VALIDVARNAME system option to ANY in order to use PMML models that were created using SAS Enterprise Miner in scoring tests, performance monitoring, and reporting within SAS Decision Manager.

In-Database Options

The In-Database Options settings enables you to specify the publish type, database connection settings, and publish settings that are used when publishing models to a database using SAS Decision Manager.

To modify the settings for the in-database options:

1. Select a method to publish models to the database for scoring. The default publish type is the SAS Embedded Process publish method.
2. Select a database type.
3. Specify values for database settings that are required to publish to the selected database type.

Here are the available database settings according to the publish method and database type:

<table>
<thead>
<tr>
<th>Database Settings</th>
<th>SAS Embedded Process</th>
<th>Scoring Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server name</td>
<td>■ Teradata</td>
<td>■ Teradata</td>
</tr>
<tr>
<td></td>
<td>■ Oracle</td>
<td>■ Netezza</td>
</tr>
<tr>
<td></td>
<td>■ Netezza</td>
<td>■ Greenplum</td>
</tr>
<tr>
<td></td>
<td>■ Greenplum</td>
<td>■ DB2</td>
</tr>
<tr>
<td></td>
<td>■ DB2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>■ Hadoop</td>
<td></td>
</tr>
<tr>
<td></td>
<td>■ SAP HANA</td>
<td></td>
</tr>
<tr>
<td>HDFS directory path</td>
<td>Hadoop</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>
### Database Settings

<table>
<thead>
<tr>
<th>Database name or instance number</th>
<th>SAS Embedded Process</th>
<th>Scoring Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teradata</td>
<td>Teradata</td>
<td></td>
</tr>
<tr>
<td>Oracle</td>
<td>Netezza</td>
<td>Greenplum</td>
</tr>
<tr>
<td>Netezza</td>
<td>Greenplum</td>
<td>DB2</td>
</tr>
<tr>
<td>Greenplum</td>
<td>DB2</td>
<td>SAP HANA</td>
</tr>
<tr>
<td>DB2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP HANA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User ID</th>
<th>Teradata</th>
<th>Teradata</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle</td>
<td>Netezza</td>
<td>Greenplum</td>
</tr>
<tr>
<td>Netezza</td>
<td>Greenplum</td>
<td>DB2</td>
</tr>
<tr>
<td>Greenplum</td>
<td>DB2</td>
<td>SAP HANA</td>
</tr>
<tr>
<td>DB2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hadoop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP HANA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Server user ID                  | Not applicable       | DB2              |

<table>
<thead>
<tr>
<th>Schema</th>
<th>Teradata</th>
<th>Teradata</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle</td>
<td>Netezza</td>
<td>Greenplum</td>
</tr>
<tr>
<td>Greenplum</td>
<td>Greenplum</td>
<td>DB2</td>
</tr>
<tr>
<td>DB2</td>
<td>DB2</td>
<td>SAP HANA</td>
</tr>
<tr>
<td>SAP HANA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4 Specify to use the model manager table when publishing. The default value is **No**. When you are publishing the scoring model files to a database using the SAS Embedded Process publish method, the files are by default stored in the table *sas_model_table*. If the **Use model manager table** value is set to **Yes**, the scoring model files are stored in the table *sas_mdlmgr_ep*. These tables are located in the target database. This setting enables users to separate the SAS Decision Manager scoring model files from the SAS model scoring files when using the SAS Embedded Process publish method.

Note: The *sas_mdlmgr_ep* table must be created before setting this option to **Yes**. For more information, see “Configuring a Database” in *SAS In-Database Products: Administrator’s Guide*.

5 Specify to force the republish of model scoring files by default when using the SAS Embedded Process publish type. The default value is **No**. If you set this setting to **Yes**, then the **Replace scoring files that have the same publish name** option in the Publish Models window in SAS Decision Manager is selected by default.

6 Select the default format of the model publish name when using the SAS Embedded Process publish method. The format selected determines the value that appears for the publish name in the Publish Models window in SAS Decision Manager. The scoring function publish method publish name defaults to the model name.

7 Specify a directory path to store the temporary scoring files. If a value is not specified, the SAS work directory is used by default. However, if the directory is not specified and you select the **Display detailed log messages** option when publishing to a database the SASUSER directory is used.

For information about the database configurations, see “Preparing a Data Management System for Use with SAS Model Manager” in *SAS In-Database Products: Administrator’s Guide*. For more information about
publishing models to a database, see “Publishing Models to a Database or Hadoop” in SAS Decision Manager: User’s Guide.

**Performance Options**

The Performance Options setting contains the performance parameters for the PERFORMANCE statement to use the SAS High-Performance Analytics procedures. Currently only the Teradata and Greenplum database types support SAS High-Performance Analytics.

The PERFORMANCE statement defines performance parameters for multithreaded and distributed computing, passes variables about the distributed computing environment, and requests detailed results about the performance characteristics of a high-performance analytics procedure.

The following performance options can be specified for the PERFORMANCE statement.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commit</td>
<td>Specifies an integer to request that the High-Performance Analytics procedure writes periodic updates to the SAS log.</td>
<td>10000</td>
</tr>
<tr>
<td>CPU count</td>
<td>Specifies how many processors the procedure should assume are available on each host in the computing environment. You can enter the value of ACTUAL, or enter an integer between 1 and 256.</td>
<td>ACTUAL</td>
</tr>
<tr>
<td>Database server</td>
<td>Specifies the name of the server for the database as defined through the hosts file and as used in the LIBNAME statement.</td>
<td></td>
</tr>
<tr>
<td>Details</td>
<td>Requests a table that shows a timing breakdown of the procedure steps.</td>
<td>No</td>
</tr>
<tr>
<td>Timeout</td>
<td>Specifies the time-out in seconds for a High-Performance Analytics procedure to wait for a connection to the appliance and establish a connection back to the client.</td>
<td>120</td>
</tr>
<tr>
<td>Host name</td>
<td>Specifies the name of the appliance. If a value for the Host option is specified, it overrides the value of the grid host environment variable.</td>
<td></td>
</tr>
<tr>
<td>Installation directory</td>
<td>Specifies the name of the directory in which the High-Performance Analytics shared libraries are installed on the appliance.</td>
<td></td>
</tr>
<tr>
<td>Install location</td>
<td>Specifies the name of the directory in which the High-Performance Analytics shared libraries are installed on the appliance. If a value is specified for the Installation directory option, it overrides this option.</td>
<td></td>
</tr>
</tbody>
</table>
### Option | Description | Default Value
--- | --- | ---
Number of nodes | Specifies the number of nodes in the distributed computing environment, provided that the data is not processed alongside the database. You can enter an integer or you can specify a value of ALL if you want to use all available nodes on the appliance without oversubscribing the system. |  
Number of threads | Specifies the number of threads for analytic computations. This option overrides the SAS system option THREADS | NOTHREADS. If you do not specify a value for this option, the number of threads are determined based on the number of CPUs on the host on which the analytic computations execute. |  
Grid host | Specifies the host name for the grid. If a value for the Host option is specified, it overrides the value of the grid host environment variable. |  
Grid RSH command | Specifies the command to run a remote shell. |  
Grid reply host | The host name of the client node to which the grid connects. |  
Grid port range | Specifies the range of parts that are permitted by the firewall. |  
Grid path | Specifies the local directory path for the grid node. |  
Grid mode | Specifies whether the HPFORECAST procedure runs in symmetric (SYM) mode or asymmetric (ASYM) mode. The default is symmetric (GRIDMODE=SYM). | Symmetric |  

For more information about High-Performance Analytics, see *SAS High-Performance Analytics Server: User's Guide*.

### Factory Miner Options

If SAS Factory Miner and SAS Decision Manager are licensed at your site, you can register projects segments and models from SAS Factory Miner to the SAS Model Manager model repository. The project segments and models are created within a portfolio. Use the **Automatically set champion** setting to automatically set the project champion in the model repository when a model is set as the champion for a project segment in SAS Factory Miner. The default value is *No*. For information about integrating SAS Factory Miner with SAS Decision Manager, see *SAS Factory Miner: Administration and Configuration*.
Configuring the Limitation for the Number of Observations for a Scoring Result Set

When a scoring test is added on the Scoring page of a project in SAS Decision Manager, and the Type field is set to Test, you can use SAS Management Console to limit the number of observations that a scoring result set can contain.

To configure a limitation for the number of observations:

1. From SAS Management Console, expand the Application Management node on the Plug-ins tab.
2. Select and expand Configuration Manager ⇒ SAS Application Infrastructure ⇒ Enterprise Decision Manager 3.3.
4. Click the Advanced tab. Change the property value for App.TableObsLimitation to limit the number of observations in the scoring result set. The default value of 0 indicates that there is no limit to the number of observations that a scoring result set can contain.
5. Click OK. The value that you specified now appears in the Number of Observations result set property when you create a scoring test using SAS Decision Manager.

Review Application Properties in SAS Management Console

Review Properties

Review the application properties in SAS Management Console to ensure that the values are appropriate for your environment. Complete the following steps:

1. In SAS Management Console, select the Plug-ins tab.
2. Select Application Management ⇒ Configuration Manager ⇒ SAS Application Infrastructure ⇒ Enterprise Decision Manager 3.3.
4. Click the Settings tab. Review the properties listed in “Business Rules Manager Web Settings” on page 32. Click to enable editing for a property.
5. Click the Advanced tab. Review the properties listed in “Business Rules Manager Web Advanced Properties” on page 33. Following an upgrade, verify all non-default, SAS Business Rules Manager Web advanced property values against the list that you recorded prior to the upgrade.
6. Click OK to close the Business Rules Manager Web 3.3 Properties dialog box.
7. Right-click Decision Manager 3.3 and select Properties. The Decision Manager 3.3 Properties dialog box appears.
Click the **Advanced** tab. Review the properties listed in “Decision Manager Advanced Properties” on page 34.

Click **OK** to close the Decision Manager 3.3 Properties dialog box.

Right-click **Decision Manager Common Mid 3.3** and select **Properties**. The Decision Manager Common Mid 3.3 Properties dialog box appears.

Click the **Advanced** tab, and review the setting of the `edm.datasource.summary.maxrowcount` property. This property specifies the maximum number of rows for data table summaries.

Click **OK** to close the Decision Manager Common Mid 3.3 Properties dialog box.

Restart SASServer7. You must restart the server in order for changes to configuration properties to take effect.

---

**Business Rules Manager Web Settings**

**Location of Code generation macro**
- the location of the macro that generates the SAS code for rule sets and rule flows. This property is used only by rule flows that were published using the first maintenance release of SAS Business Rules Manager 1.2. It is not used by rule flows published with later versions.

**Max row count per table**
- the maximum number of rows per rule flow test table. This property applies only to the first maintenance release of SAS Business Rules Manager 1.2, to SAS Business Rules Manager 2.1, and to SAS Decision Manager 2.1. It is not used by later versions.

**Temporary test code generation directory**
- applies only to SAS Business Rules Manager 1.2 and the first maintenance release of SAS Business Rules Manager 1.2. This directory is not used by later versions.

**Largest allowed uploaded lookup table row count**
- the maximum number of rows that can be uploaded for a lookup table. The default is 5000. This value should not exceed 10,000.

**Maximum Testing Log Length (in lines) of SAS log displayed within User Interface**
- the maximum number of lines from the SAS log that are displayed on the SAS log section on the Results tab for the rule flow.

**Support macros in rule expressions**
- determines whether macros are allowed in rule expressions.

**Temporary Location used in Rule Generation**
- a temporary directory that SAS Decision Manager uses while it generates the SAS code for vocabularies, rule sets, and rule flows. A best practice is to specify a directory that is outside of the SAS configuration directory.

**Test Library Root File System Directory**
- the directory where rule flow tests and test results are saved. As users create additional rule flow tests, administrators might need to delete old test results, or ask users to delete old test cases. A best practice is to specify a directory that is outside of the SAS configuration directory.

**Note:** You might be running tests that use data sources that are in a distributed environment such as the Hadoop Distributed File System (HDFS). In this case, ensure that the SAS Server file system has enough space to accommodate output data in the form of SAS data sets. If sufficient space is not available, you might need to create subsets of the input data to use for testing.
Test Metadata Library Root Directory
the folder in which metadata for rule flow tests is stored.

Business Rules Manager Web Advanced Properties

brm.csvfile.separator
the character that is used as a separator in CSV files that are used to create lookup tables through the SAS Decision Manager interface.

brm.datagrid.type.enabled
enables the use of data grid variables and functions in rule flows and decisions. Contact SAS Technical Support for more information.

brm.folder.config.enabled
enables you to control access to folders. When this property is set to true, you can define a role for a business rules folder administrator. Users assigned to this role control which user group has access to a folder.

Setting brm.folder.config.enabled to true enables the ability to import and export business rules content from the SAS Decision Manager database. Business rules content includes business rules folders, vocabularies, terms, lookup tables, rule sets, and rule flows. See “Enable Business Rules Folder Administration” on page 57 for more information.

You can enable the role of folder administrator and still allow content to be imported and exported by setting brm.import.restriction.override to true.

brm.import.restriction.override
specifies whether business rules content can be imported to and exported from the SAS Decision Manager database when the brm.folder.config.enabled property is set to true.

brm.lookup.file.upload.encoding
the character encoding for files that contain lookup tables that will be imported through the user interface. The default encoding is UTF-8. The supported encodings are listed in Oracle Java SE documentation at https://docs.oracle.com/javase/7/docs/technotes/guides/intl/encoding.doc.html.

brm.rulegen.mba.maxrowcount
the maximum number of rows for output tables that are generated by the Market Baskets discovery technique.

brm.rulegen.rfm.maxrowcount
the maximum number of rows for output tables that are generated by the Recency Frequency Monetary discovery technique.

brm.rulegen.scorecard.maxrowcount
the maximum number of rows for output tables that are generated by the Scorecard discovery technique.

brm.rulegen.tree.maxrowcount
the maximum number of rows for output tables that are generated by the Decision Tree discovery technique.

brm.runtime.codetype
determines whether SAS Decision Manager generates DS2 code or DATA step (DS1) code for rule flows. In many cases, you will get better performance by specifying DS1. However, consider specifying DS2 if your input data is in Teradata, Greenplum, or Hadoop, and you have installed the SAS Code Accelerator. In addition, the LIKE operator is not supported for DS1.

Note: If you are migrating or upgrading from SAS Decision Manager 3.1 or earlier, this property is not defined. You can add it as a new property. This property exists starting with SAS Decision Manager 3.2.

Note: All code that is run by decisions is DS2 code.
brm.testing.char.length.override
the maximum number of characters for action terms that are defined as character variables and that are not mapped to input variables. This value is used when rule flows are tested in SAS Decision Manager.

brm.default.application.server.context.override
the default application server for rule flow testing. You can specify the short logical name such as SASApp. If a value is not specified for this property, SAS Decision Manager looks for a server context named SASApp. If that server context does not exist, SAS Decision Manager uses the last one returned from the metadata server.

Note: This property is not predefined. You can add it as a new property.

Decision Manager Advanced Properties

Logon.Style
the default theme used by the SAS Decision Manager interface.

dcb.default.application.server.context.override
the default application server for decision testing. You can specify the short logical name such as SASApp. If a value is not specified for this property, SAS Decision Manager looks for a server context named SASApp. If that server context does not exist, SAS Decision Manager uses the last one returned from the server service.

Note: This property is not automatically added for migrations or upgrades.

dcb.testing.char.length.override
the maximum number of characters for terms used in decisions that are defined as character variables and that are not mapped to input variables. This value is used when decisions are tested in Decision Builder.

dcb.testlib.dir
the directory for Decision Builder testing results in SAS Decision Manager.

Note: Some deployments might have multiple application servers that are configured for Job Execution Service. In these cases it is possible for decision test results (log and output) to be saved separately from the code that is generated by a test. If a test runs successfully but the testing results are not available through the Decision Builder user interface, the results might be saved on a different server. To avoid this issue, change the dcb.testlib.dir property on each server to specify the testing results directory with a UNC path or a network location. The dcb.testlib.dir property on each server must specify the same directory.

services.rootscsfolder
the root folder for the SAS Content Server. Do not change this value.

Modify Log File Settings

Log4j Configuration File
SAS Decision Manager uses log4j to perform logging. When SAS Decision Manager starts, the log4j configuration files for the application are read from SAS-configuration-directory\Lev\Web\Common\LogConfig\. The filenames are SASBusinessRulesManagerWeb-log4j.xml and SASModelManager-log4j.xml. These files are standard log4j configuration files.

You should not change the existing categories or root logger in a configuration file unless you are instructed to do so by SAS Technical Support.
Note: If you make any changes to the SASBusinessRulesManagerWeb-log4j.xml file, you must restart SASServer7 for the changes to take effect. If you make changes to the SASModelManager-log4j.xml file, you must restart SASServer11.

Logging Priority Levels
You can change the logging priority levels in a log configuration file if needed.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEBUG</td>
<td>The most verbose logging level. This level displays information that is most useful for debugging an application. SAS Decision Manager should run under this priority only for capturing additional log information. This priority level is not an acceptable priority level for the day-to-day operation of SAS Decision Manager.</td>
</tr>
<tr>
<td>INFO</td>
<td>Verbose logging level. This level displays messages that highlight the progress of an application. SAS Decision Manager should run under this priority only for capturing additional log information. This priority level is not an acceptable priority level for the day-to-day operation of SAS Decision Manager.</td>
</tr>
<tr>
<td>WARN</td>
<td>Restrictive logging. This level displays information about potentially harmful situations and is an acceptable priority for the day-to-day operation of SAS Decision Manager.</td>
</tr>
<tr>
<td>ERROR</td>
<td>The most restrictive logging level. This level displays error events and is an acceptable priority for the day-to-day operation of SAS Decision Manager.</td>
</tr>
</tbody>
</table>

Log Files
SAS Decision Manager writes information to the following log files:

SASBusinessRulesManagerWeb3.3.log
- contains messages from business rules activities

SASModelManager14.3.log
- contains messages from model management activities

SASDecMgrCommon3.3.log
- contains messages from the Workflow and Data plug-ins

SASDecMgrShell3.3.log
- contains general messages from the Shell

By default, the application writes the SAS Decision Manager log files to SAS-configuration-directory\Levn\Web\Logs\SASServer7_1\log files. The SASModelManager14.3.log file is written to SAS-configuration-directory\Levn\Web\Logs\SASServer11_1\log files. You can change the location of these log files in the configuration file. Changes to the configuration file take effect when the middle-tier application server is restarted. See "Administer Logging for SAS Web Applications" in SAS Intelligence Platform: Middle-Tier Administration Guide for more information about this configuration file.

SAS Decision Manager creates new log files each day. For information about logging configurations, see "Modifying Your Server Logging Configurations" in SAS Intelligence Platform: System Administration Guide.
Turn on SQL Logging

To turn on SQL logging and write SQL parameter values for each query to the log file, add the following categories to the log4j.xml configuration file:

```
<category additivity="false" name="org.hibernate.type">
    <priority value="TRACE"/>
    <appender-ref ref="SAS_FILE"/>
</category>

<category additivity="false" name="org.hibernate.SQL">
    <priority value="DEBUG"/>
    <appender-ref ref="SAS_FILE"/>
</category>
```

Manage Directories for Business Rules Content

SAS Decision Manager creates two directories for business rules metadata: Products and /System/Applications.

SAS Decision Manager creates a location for published XML files, sas dav/Products. The BusinessRuleFlow metadata object does not delete the XML documents stored in this location in order to ensure that an audit trail is maintained.

Before you delete any XML content from sas dav/Products, you should do the following:

1. Back up all versions of the content. The easiest way to back up the content is to use SAS Management Console to export the BusinessRuleFlow object that refers to the content.

2. Ensure that no BusinessRuleFlow objects refer to the content.
Performing Upgrade Tasks

About the Upgrade Process

You can upgrade from SAS Decision Manager 2.2 to SAS Decision Manager 3.3.

Note: Beginning with SAS Decision Manager 3.1, SAS Decision Manager includes a SAS Decision Manager Common component called Decision Builder and is integrated with SAS Lineage. If you are upgrading from SAS Decision Manager 3.1 or 3.2 to 3.3, only one pass of the SAS Deployment Wizard is needed. If you are upgrading from SAS Decision Manager 2.1 or 2.2 to 3.3, two passes of the SAS Deployment Wizard installation and configuration process are required in order to complete the upgrade. During the first pass of the SAS Deployment Wizard, your existing deployment is upgraded. After the upgrade has completed successfully, you must run the SAS Deployment Wizard again to install the new product components and to complete the configuration.

The SAS Decision Manager upgrade process supports upgrading to a database from the same vendor as the database that you are currently using. Upgrading from a database based on Oracle to a database based on PostgreSQL, or vice versa, is not supported.

If you are using Oracle for your SAS Decision Manager database, the upgrade process assumes that the upgraded environment uses the same instance of Oracle. The upgrade process does not support moving to a different Oracle database server.

Pre-upgrade Steps

Before you upgrade to SAS Decision Manager 3.3, record the database settings in your current environment. You must enter this information in SAS Deployment Wizard. Before you upgrade, you must also record all non-default values for the SAS Decision Manager Web advanced properties.

- If you are upgrading from SAS Decision Manager 2.2 or later, record the database name and the user ID for your SAS Decision Manager Common Data Server database. The default database name is dcmdb.

  You can find the database name in the SASCONFIG/Web/WebAppServer/SASServer7_1/conf/server.xml file on the middle-tier server. Find the resource with the name sas/jdbc/DecisionManagerDS, and look for the value of the url attribute. The database name is the text after the
final forward slash (/) in the URL. For example, if the attribute is `url="jdbc:postgresql://host:10482/dcmdb"`, then the database name is `dcmdb`.

If you are using Oracle for your database, ensure that the Oracle client is installed on your server tier. Also ensure that there is a matching tnsnames.ora file that corresponds to your database. Record the information in the following table.

**Table 4.1  SAS Deployment Wizard Information for Oracle**

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Record Information Here</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Name</td>
<td></td>
<td>Specifies the fully qualified host name of the server on which the database is installed.</td>
</tr>
<tr>
<td>Port</td>
<td></td>
<td>Specifies the port number that is used by the database. The default port for Oracle is 1521.</td>
</tr>
<tr>
<td>Directory containing JDBC driver jars</td>
<td></td>
<td>Specifies the location of the database vendor’s JDBC JAR file. This file must be available on the middle tier and on any machine on which you are deploying SAS Decision Manager in order to configure SAS Decision Manager database. See &quot;Verify JDBC Drivers for Oracle&quot; on page 3 for more information.</td>
</tr>
</tbody>
</table>
| Database SID or Service Name |                         | Specifies the Oracle database name. The database name must match either the service name or the Oracle site identifier (SID), both of which can be found in the tnsnames.ora file. For example:  

  (CONNECT_DATA = (SERVICE_NAME = mydb))  

  (CONNECT_DATA = (SID = mydb))  

You can also find the Oracle SID by running the following query using a database user ID on your Oracle instance:  

  select instance from v$thread  

  **Note:** If you select **Use Oracle database name as a Service Name**, then you must enter the service name that is specified in the tnsnames.ora file. For information about naming methods for Oracle databases, see the Oracle documentation for your database at [https://docs.oracle.com/en/database/oracle/oracle-database/index.html](https://docs.oracle.com/en/database/oracle/oracle-database/index.html). |
| User ID                   |                         | Specifies the user ID of the database user whose credentials are used to access SAS Decision Manager data on the server.                   |
| Password                  |                         | Specifies the password of the user ID whose credentials are used to access SAS Decision Manager data on the server.                     |
| Schema Pattern            |                         | Specifies the schema name for the database. The default schema name is the same as the user ID.                                          |

Upgrade Steps for SAS Decision Manager

To determine the required steps to upgrade to the latest version of SAS Decision Manager, see the upgrade instructions in *SAS Guide to Software Updates and Product Changes* at http://support.sas.com/documentation/whatsnew/index.html#wn94.

Follow the instructions provided in “Add SAS Products That Require Configuration” in *SAS Intelligence Platform: Installation and Configuration Guide* to complete the installation and configuration process for an upgrade.

When you run the SAS Deployment Wizard the second time, complete these steps:

1. Verify that your plan file contains SAS Model Manager and SAS Decision Manager Common products. There is not a standard plan for SAS Decision Manager, so you need a custom plan.

2. Verify that you are using the new SAS installation data (SID) file. The SID file for your software (your order) is located in the *sid_files* directory at the root of your SAS Software Depot. Or, if you have received media, the SID file is on the first disk of that installation media.

3. In the list of products to be installed, do not change the selections. If there are no product changes, then the deployment wizard does not re-install any pre-existing products.

When you run the SAS Deployment Wizard the second time, the following products are installed:

- SAS Lineage Mid-Tier
- SAS Micro Analytic Service Java Interfaces
- SAS Micro Analytic Service Rest API

*Note:* In a multi-machine environment, the server products are typically installed on the SAS Application Server. The rest of the products are on the SAS Middle-Tier Server.

*Note:* If you are configuring multiple web application servers, SASServer13 is added to the deployment for the additional products, so be aware of the need for additional ports.

4. Before the configuration stage begins, make sure that the following SAS Services are started:

- SAS Metadata Server
- SAS Web Infrastructure Platform Data Server
- SAS Decision Manager Common Data Server (if you are not using Oracle for your database)
- SAS Web Server (httpd - WebServer)
- SAS Object Spawner
- SAS JMS Broker
- SAS Cache Locator

5. Verify that the following products are selected for configuration:

- SAS Web Application Server Configuration
- SAS Lineage Mid-Tier
- SAS Help Viewer for Middle-Tier Applications
- SAS Micro Analytic Service Rest API
Post-upgrade Steps

1. After you complete the upgrade process with the SAS Deployment Wizard, see the Instructions.html file. The Instructions.html file is located in \SAS-configuration-directory\Lev\Documents\ The default URL is http://host_name:port/SASDecisionManager. The default URL for Decision Builder is http://host_name:port/SASDecisionManager/DecisionBuilder.

2. If you are upgrading from SAS Decision Manager 2.1 to 3.3 and you are using the SAS Decision Manager Common Data Server for your database, use SAS Deployment Manager to remove the existing configuration for both Decision Manager Common Mid-Tier and Business Rules Web Manager Mid-Tier. See “Removing a SAS Configuration” in SAS Intelligence Platform: Installation and Configuration Guide for more information.

   Note: Do not remove the configurations if you are using Oracle for your database.

3. If you are upgrading from SAS Decision Manager 2.1 to 3.3 and you are using the SAS Decision Manager Common Data Server for your database, run the SAS Deployment Wizard a second time to reconfigure both Decision Manager Common Mid-tier and Business Rules Web Manager Mid-Tier.

   Note: Do not reconfigure these products if you are using Oracle.

4. (Optional) Configure your deployment to use HTTPS. See “Configure Your Deployment for HTTPS” on page 21 for more information.

5. Update your user group memberships, authorization, roles, and capabilities as needed. Make sure that you create the Decision Builder User role and add it to the Decision Manager Users group. See “Updating Groups and Roles for SAS Decision Manager 3.3” on page 57 for more information.

6. (Optional) Create a new top-level folder for SAS Decision Manager content if there are no existing top-level folders. See “%BRM_IMPORT_FOLDER” in SAS Decision Manager: Macro Guide for more information.

7. (Optional) Add the Visual Analytics: Data Building and Data Management: Lineage roles to the Decision Manager Users group. See “Administering Group and Role Membership” on page 55 for more information. These roles enable users to run SAS Visual Data Builder and view lineage information for rule flows and models.

8. Grant users permissions to the Decision Builder testing directory.

9. Review the configuration properties in SAS Management Console. Ensure that the values are appropriate for the new environment. See “Review Application Properties in SAS Management Console” on page 31 for more information. Verify the SAS Business Rules Manager Web advanced properties against the non-default values that you recorded before the upgrade.
### About the Migration Process

You can migrate from SAS Decision Manager, including 2.2, 3.1, and 3.2, to SAS Decision Manager 3.3.

The SAS Decision Manager migration process supports migrating to a database from the same vendor as the database that you are currently using. Migrating from a database based on Oracle to a database based on PostgreSQL, or vice versa, is not supported.

If you are using Oracle for your database, the migration process assumes that the migrated environment uses the same instance of Oracle. The migration process does not support moving to a different Oracle database server.

### Pre-migration Steps

For information about the pre-migration tasks that you must perform, see “Performing Pre-migration Tasks” in SAS Intelligence Platform: Migration Guide. Here are some important steps to help with your migration:

- Back up your SAS system, including servers and desktop clients.
- Back up the SAS Web Infrastructure Platform Services database if you are migrating a SAS 9.3 or SAS 9.4 system.
- Back up the SAS Model Manager database if you are migrating SAS Model Manager 12.1 on a SAS 9.3 system or SAS Model Manager 12.3 on a SAS 9.4 system.
- Back up the SAS Decision Manager database if you are migrating from SAS Decision Manager 2.2, 3.1, or 3.2 to SAS Decision Manager 3.3 on a SAS 9.4 system.
- If you are moving to a new system, ensure that the required operating system user accounts that you use for SAS in your current operating system also exist in your new operating system. These accounts are required for running scoring tests, performance definitions, retraining models, and scheduling jobs.
Before you migrate to SAS Decision Manager 3.3, you should record the database settings in your current environment. Verify that these settings are entered in the SAS Deployment Wizard when you run the migration.

- If you are migrating from SAS Model Manager 12.1, or 12.3, record the database name and the user name for your SAS Model Manager database. The default database name is mdlmgrdb.
- If you are migrating from SAS Decision Manager 2.2 or later, record the database name and the user ID for your SAS Decision Manager Common Data Server database. The default database name is dcmdb.

You can find the database name in the `/SAS-configuration-directory/Lev3/Web/WebAppServer/SASServer7_1/conf/server.xml` file on the middle-tier server. Find the resource with the name `sas/jdbc/DecisionManagerDS`, and look for the value of the `url` attribute. The database name is the text after the final forward slash (`/`) in the URL. For example, if the attribute is `url="jdbc:postgresql://host:10482/dcmdb"`, then the database name is `dcmdb`.

- If you are using Oracle for your database, ensure that the Oracle client is installed on your server tier and that there is a matching `tnsnames.ora` file that corresponds to your database.
- If you are using Oracle for your database, record the information that is listed in the following table.

Table 5.1  SAS Deployment Wizard Information for Oracle

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Record Information Here</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Name</td>
<td></td>
<td>Specifies the fully qualified host name of the server on which the database is installed.</td>
</tr>
<tr>
<td>Port</td>
<td></td>
<td>Specifies the port number that is used by the database. The default port for Oracle is 1521.</td>
</tr>
<tr>
<td>Directory containing JDBC driver jars</td>
<td></td>
<td>Specifies the location of the database vendor’s JDBC JAR file. This file must be available on the middle tier and on any machine on which you are deploying SAS Decision Manager in order to configure SAS Decision Manager database. See “Verify JDBC Drivers for Oracle” on page 3 for more information.</td>
</tr>
</tbody>
</table>
| Database SID or Service Name                |                         | Specifies the Oracle database name. The database name must match either the service name or the Oracle site identifier (SID), both of which can be found in the `tnsnames.ora` file. For example: 

```
(CONNECT_DATA = (SERVICE_NAME = mydb))
```

```
(CONNECT_DATA = (SID = mydb))
```

You can also find the Oracle SID by running the following query using a database user ID on your Oracle instance:

```
select instance from v$sqlthread
```

Note: If you select **Use Oracle database name as a Service Name**, then you must enter the service name that is specified in the `tnsnames.ora` file.

If you are using Oracle for your database, verify that you have the correct JDBC drivers. For more information, see “Verify JDBC Drivers for Oracle” on page 3.

Use the SAS Migration Utility to create a migration package. You must enter the configuration properties for the SAS Model Manager Mid-Tier (MMAPI) database management system in the SAS Migration Utility properties file.

The values for the SAS Migration Utility properties can be found in SAS Management Console. Select the Folders tab and expand System ⇒ Applications ⇒ SAS Model Manager Mid-Tier. Select the Model Manager Mid-Tier version folder, right-click the Model Manager-Mid-Tier version application object, and then select Properties ⇒ Configuration. The prefix for the configuration properties that are equivalent to the SAS Migration Utility properties is dbms.mmapi.

Note: If you are migrating from SAS Model Manager 12.1 or 12.3, the default name of the SAS Model Manager database is mdlmgrdb. Beginning with SAS Model Manager 13.1, the database is called the SAS Decision Manager database. The default name is dcmdb.

Here is the list of configuration properties that should be used to populate the migration properties:

<table>
<thead>
<tr>
<th>SAS Migration Utility Properties</th>
<th>Configuration Properties in SAS Management Console</th>
</tr>
</thead>
<tbody>
<tr>
<td>mmapi.data.dbms.type</td>
<td>dbms.mmapi.type</td>
</tr>
<tr>
<td>mmapi.dbms.data.name</td>
<td>dbms.mmapi.name</td>
</tr>
<tr>
<td>SMU.mmapi.dbms.host</td>
<td>dbms.mmapi.host</td>
</tr>
<tr>
<td>SMU.mmapi.dbms.port</td>
<td>dbms.mmapi.port</td>
</tr>
<tr>
<td>SMU.mmapi.dbms.userid</td>
<td>dbms.mmapi.userid</td>
</tr>
<tr>
<td>SMU.mmapi.dbms.password</td>
<td>&lt;not stored here&gt;</td>
</tr>
<tr>
<td>SMU.mmapi.jdbc.driver</td>
<td>dbms.mmapi.jdbc.dir</td>
</tr>
</tbody>
</table>

Post-migration Steps

Overview of Post-migration Steps

After you have migrated to SAS Decision Manager 3.3 on the latest maintenance release of SAS 9.4, perform the following post-migration steps:

1. Copy or move the contents of the rule flow testing directories. See “Copying Rule Flow Test Results” on page 44 for more information.

2. Copy or move the contents of the channels directory from the source machine to the target machine. See “Copying Publishing Channels” on page 45 for more information.

3. Run post-migration macros if you are migrating from one UNIX operating system to a different type of UNIX system. See “Migrate Model Information to a New Operating System” on page 47 for more information.

4. Run the appropriate migration script to migrate your database to SAS Decision Manager 3.3. See the following topics for additional information:
   - “Migrate to Version 3.3 for Oracle” on page 45
   - “Migrate to Version 3.3 for SAS Decision Manager Common Data Server” on page 45

   Note: If you are migrating from SAS Decision Manager 3.3 to 3.3 (hardware upgrade) and you are using Oracle for your database, you do not need to run a migration script.

5. (Optional) Configure your deployment to use HTTPS. See “Configure Your Deployment for HTTPS” on page 21 for more information.

6. Update your user group memberships, authorization, roles, and capabilities as needed. See “Updating Groups and Roles for SAS Decision Manager 3.3” on page 57 for more information.

7. (Optional) Add the Visual Analytics: Data Building and Data Management: Lineage roles to the Decision Manager Users group. See “Administering Group and Role Membership” on page 55 for more information. These roles enable users to run SAS Visual Data Builder and view lineage information for rule flows.

8. (Optional) Create a new top-level folder for SAS Decision Manager content if there are no existing top-level folders. See “%BRM_IMPORT_FOLDER” in SAS Decision Manager: Macro Guide for more information.

9. Review the configuration properties in SAS Management Console. Ensure that the values are appropriate for the new environment. See “Review Application Properties in SAS Management Console” on page 31 for more information.

10. If you are migrating from SAS Model Manager 12.1 or earlier, see SAS Model Manager: Migration Guide for additional post-migration steps that you might need to perform.

Note: All user-defined model templates are copied from the source system to the target system by the migration process. This content includes all user-defined life cycle templates, model templates, report templates, and SAS code files. The user-defined templates are located on the SAS Content Server at http://hostname:port/SASContentServer/repository/default/ModelManager/ConfigTemplates/ext/.

Copying Rule Flow Test Results

Rule flow testing results are not automatically migrated. For any results that you want to access with SAS Decision Manager 3.3, complete the following steps:
1 Copy the test results from your old deployment to the new deployment. The directory path for rule flow test results is specified by the Business Rules Manager Web property Test Library Root File System Directory in SAS Management Console. You must use the same directory path in the new deployment. See “Review Application Properties in SAS Management Console” on page 31 for more information.

2 (Optional) If you are running in a UNIX operating environment and the user that needs to access the test results is different from the current user, use the `chown -R` command to change the ownership of the testing folders. For more information, refer to the UNIX man page for the `chown` command.

3 Update the relationship information for the test results so that users can view the test results and re-run the test cases. To update the relationship information, run the following REST service:

```
http://host:port/SASBusinessRulesManagerWeb/rest/RuleflowTestLibMigrate
```

### Copying Publishing Channels

When migrating from a previous release of SAS Decision Manager, you must manually copy the contents of the channels directory from your old system to a directory on the new machine that is running SAS Workspace Server. It is recommended that you use the same directory name when migrating from an existing SAS Decision Manager 3.3 deployment to a new deployment of SAS Decision Manager 3.3. If you use the same directory name, you do not need to copy the contents of the channels directory. The default directory path for channels is \SAS-Configuration-directory\Level\AppData\SASModelManager14.3\Channels.

For example, in Windows the path might be `C:\SAS\Config\Level\AppData\SASModelManager14.3\Channels`.

If you use a different directory name, then you must modify the channel persistent store directory location in the SAS Management Console. For more information, see “Modify an Existing Channel or Channels Node Location” on page 86.

### Migrate to Version 3.3 for Oracle

The scripts for migrating an Oracle database are located in the following directory:

```
SASHome/SASDecisionManagerCommonDataServer/3.3/Config/Deployment/dbscript/oracle/migration/
```

To migrate an Oracle database from SAS Decision Manager 2.2 or 3.1 to 3.3, run the `migration_brm_version_to_brm_3.3.sql` script for your current release of SAS Decision Manager.

For example, you can use SQL*Plus to run the script to migrate from SAS Decision Manager 2.2 to 3.3 as follows:

```
sqlplus username@tnsnames @/install/SASHome/
SASDecisionManagerCommonDataServer/3.3/Config/Deployment/
dbscript/oracle/migration/migration_brm_2.2_to_brm_3.3.sql schemaName
```

### Migrate to Version 3.3 for SAS Decision Manager Common Data Server

If you are migrating from SAS Decision Manager 2.2 or later to 3.3 and you are using the SAS Decision Manager Common Data Server, you must run the database migration script for your operating environment. Run this script on the target middle-tier machine where the SAS Decision Manager Common Data Server is running.

1 Verify that the SAS Decision Manager Common Data Server is running on both the source and target machines.

2 Shut down all SAS Web Application Server processes.
3 Run the database migration script for your operating environment. The script for Windows platforms is named `postgres-migration.bat`, and the script for UNIX platforms is named `postgres-migration.sh`. They are located in the following directory:

```
SASHome/SASDecisionManagerCommonDataServer/3.3/Config/Deployment/Migration/
```

Note: This directory contains a README.TXT file that contains information about the parameters for these scripts.

When you run the migration script, substitute the correct values for the release that you are migrating from. This includes the server name, the port number, and the user ID for your database. The script prompts you to enter a password. The syntax for these scripts is as follows:

```
postgres-migration.[bat | sh] SASHome version
source_port source_host source_user source_db_name
target_port target_host target_admin target_user target_db_name
< target_exists >
```

- **SASHome** specifies the SAS Home installation directory location. In Windows operating environments, it is recommended that you enclose this parameter in double quotation marks.
- **version** specifies the version number of your current (source) database from which you are migrating content. Specify 2.2, 3.1, 3.2, or 3.3.
- **source_port** specifies the port number of the database from which you are migrating content.
- **source_host** specifies the host name of the database from which you are migrating content.
- **source_user** specifies the user ID for Decision Manager Common Middle Tier. This value must be a user ID that has access to all of the database content that needs to be migrated. You can find the correct value for this parameter in the `/SAS-configuration-directory/LevWn/Web/WebAppServer/SASServer7_1/conf/server.xml` file on the middle-tier server for the source system. Specify the value of the `user` attribute of the resource with name `sas/jdbc/DecisionManagerDS`.
- **source_db_name** specifies the name of the database from which you are migrating content. You can find the correct value for this parameter in the `/SAS-configuration-directory/LevWn/Web/WebAppServer/SASServer7_1/conf/server.xml` file on the middle-tier server for the source system. Find the resource with the name `sas/jdbc/DecisionManagerDS`, and look for the value of the `url` attribute. The database name is the text after the final forward slash (/) in the URL. For example, if the attribute is `url="jdbc:postgresql://host:10482/dcmdb"`, then specify `dcmdb` for `source_db_name`.
- **target_port** specifies the port number of the database to which you are migrating the content.
- **target_host** specifies the host name of the database to which you are migrating the content.
- **target_admin** specifies the user ID of the database administrator for the database to which you are migrating the content. This user ID is used to clean the target database and prepare it for the migrated content.
- **target_user** specifies a database user ID for the database to which you are migrating the content. This user ID is assigned ownership of the migrated content.
- **target_db_name** specifies the database name of the database to which you are migrating the content. The default target database name is `dcmdb`.
target_exists

specifies whether the target database exists. The default value is YES. If you have attempted to run this migration script but the migration failed, specify NO. Normally, the script creates a backup of the source database. If you specify NO, the script does not create an additional backup.

Note: This parameter is optional.

Migrate Model Information to a New Operating System

If you are migrating from one UNIX operating system to another, then some post-installation steps are required to complete the migration process. SAS Decision Manager provides post-migration macros to assist with this process. Only SAS files on the WebDAV server in the `\ModelManagerDefaultRepository\Project\Version\Resources` directory are handled by the post-migration macros. If you have SAS files in another directory location, you must manually migrate them.

Prerequisites

- You must have access to the SAS deployment on the source system and target system to run these macros.
- The %MM_migrationStep1 and %MM_migrationStep2 macros are available in the SAS catalog `sashelp.modelmgr.migration.source`.
- If your source system is SAS Model Manager 12.3, you must copy the migration.source file from the `sashelp.modelmgr` catalog on the target system to the `sashelp.modelmgr` catalog on the source system.
- If your source system is SAS Model Manager 12.3, you must copy the migration.source file from the `sashelp.modelmgr` catalog on the target system to the `sashelp.modelmgr` catalog on the source system.
- You must run the migration macros using Base SAS on the machine where the SAS Model Manager Server is installed for both your source and target systems.

To make the migration.source file available in the `sashelp.modelmgr.catalog` on the source system:

1. Export the migration.source file from the `sashelp.modelmgr` catalog on the target system into a CPORT file.
   
   ```
   filename exp "C:\temp\modelmgr-migration-source.cpo";
   proc cport file=exp cat=sashelp.modelmgr;
   select migration.source;
   run;
   filename exp;
   ```

2. Copy the `modelmgr-migration-source.cpo` file from the target system to the source system

3. Import migration.source from the `modelmgr-migration-source.cpo` file into the `sashelp.modelmgr` catalog on the source system.
   
   ```
   filename imp "C:\temp\modelmgr-migration-source.cpo";
   proc cimport infile=imp cat=sashelp.modelmgr;
   select migration.source;
   run;
   filename imp;
   ```

Run the Migration Macros

Perform the following steps to ensure that all data, content, and link and filename references that are used by SAS Decision Manager are accessible by the new SAS 9.4 deployment:

1. Run the %MM_migrationStep1 macro in Base SAS on your source system.
2. Run the %MM_migrationStep2 macro in Base SAS on your target system.
Note: For more information about the migration macros, see “Macros for Migrating Model Content” on page 87.
Security Administration Tasks for SAS Decision Manager

Security administration for SAS Decision Manager consists of the following tasks:

- administering SAS identities for your users by adding account information to the SAS Metadata Server
- administering groups of users in order to simplify the management of roles
administering roles, which provide users with access to specific application features.

The information included here is a brief introduction to the concepts of users, SAS identities, groups, roles, and capabilities. For complete information about security administration, see SAS Management Console: Guide to Users and Permissions and SAS Intelligence Platform: Security Administration Guide.

Administering SAS Identities for Users

Overview of SAS Identities

For each SAS Decision Manager user, you must create an individual SAS identity on the SAS Metadata Server. The SAS identity is a copy of the ID with which the user logs on to SAS applications. Based on this identity, the system can determine who can access which application and can audit individual actions in the metadata layer. The SAS identity consists of a name, user ID, and password for the user’s external account. This ID can be any type of account that is known to the metadata server’s host. Examples are an LDAP account, an Active Directory account, a host account, or another type of account.

When you are entering user IDs for Windows accounts, be sure to qualify the ID (for example, WIN\myID or myID@mycompany.com).

In a Windows environment, add new users to the Log on as a batch job local security policy on the machine that hosts the SAS Workspace Server.

Note: Enter a user ID for Microsoft Windows in the format domain\userID. In order for users to be able to schedule jobs with SAS Decision Manager, you must specify a valid password for each user's account in the SAS Metadata Repository. Users must sign in with the same user ID (domain\userID) and password that you specified in their user account.

Note: Users who log on to SAS Decision Manager using an internal account (a user ID that ends in @saspw) cannot access all of the features of the application. All users should be assigned external accounts.

The following users are created as part of the SAS Decision Manager installation process:

Table 6.1 Types of Users

<table>
<thead>
<tr>
<th>User</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAS Administrator</td>
<td>This user has access to all SAS Management Console capabilities and metadata administrative tasks.</td>
</tr>
<tr>
<td>SAS Demo User</td>
<td>This user is optional. You can choose to create this user during installation. However, this user is not assigned to a group during installation.</td>
</tr>
</tbody>
</table>

Creating SAS Identities

To create SAS identities for your users, manually enter the information for each user through the User Manager plug-in in SAS Management Console. If you have a large number of users, then you can extract user and group information from one or more enterprise identity sources. You can then use SAS bulk-load macros to create the identity metadata from the extracted information.

For more information about creating and managing identities, see SAS Management Console: Guide to Users and Permissions. For information about the SAS bulk-load macros, see "" in SAS Intelligence Platform: Security Administration Guide.
Groups and Group Membership

About Groups

A group is a set of users. Groups enable you to grant multiple users membership in a role or permissions to metadata, thus simplifying security administration. You can create as many groups as are needed in order to manage your installation.

**TIP** A group's membership can include other groups as well as individual users. This enables you to create a nested group structure.

Predefined User Groups in SAS Decision Manager

*Table 6.2  Predefined User Groups*

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>This group includes everyone who can access the metadata server, either directly or through a trust relationship. If a user is able to log on to a client application but does not have an individual SAS identity, the user is assumed to be in the public group. Because this group has implicit membership, you cannot explicitly add or remove users from this group.</td>
</tr>
<tr>
<td>SAS Users</td>
<td>This group includes everyone who can access the metadata server, either directly or through a trust relationship. If a user is able to log on to a client application but does not have an individual SAS identity, the user is assumed to be in the public group. Because this group has implicit membership, you cannot explicitly add or remove users from this group.</td>
</tr>
<tr>
<td>SAS Administrators</td>
<td>This is a standard group for metadata administrators. In a standard configuration, members are granted broad access and administrative capabilities, but are not unrestricted.</td>
</tr>
<tr>
<td>Decision Manager Common Administrators</td>
<td>This group has administrative permissions. Membership in this group is required to administer workflows. In your initial installation, this group is a member of the following roles:</td>
</tr>
<tr>
<td></td>
<td>- Decision Manager Common: Administration</td>
</tr>
<tr>
<td></td>
<td>- Business Rules Manager: All Capabilities</td>
</tr>
<tr>
<td></td>
<td>- Model Manager: Administration Usage</td>
</tr>
<tr>
<td></td>
<td>- Decision Builder User (through the Decision Manager Users group)</td>
</tr>
</tbody>
</table>

In your initial installation, this group is a member of the following roles:

- Decision Manager Common: Administration
- Business Rules Manager: All Capabilities
- Model Manager: Administration Usage
- Decision Builder User (through the Decision Manager Users group)
### Decision Manager Users

This group is created during the installation process. Members of this group have permission to read, add, or delete table summary information in the Data category.

This group is a member of the Decision Builder User role, so members of this group have permission to read, create, update, delete, run, and publish a decision.

During configuration, this group was associated with an identity that enables members to access the database during rule flow and table summary execution.

**Note:** This group is the only group that is granted permission to publish business rules content to the SAS Content Server by default.

**Note:** Unless you make configuration changes, users who do not have administrator permission must be members of this group. If you want these users to be members of a different group, you must grant the group permissions that enable members to do the following:

- access the database (using the necessary identity)
- publish content to the folders for SAS Decision Manager on the SAS Content Server

### Model Manager Administrator Users

This group has administrative permissions in the Projects and Portfolio categories.

For specific user tasks that can be performed, see “Model Management User Tasks” on page 61.

### Model Manager Advanced Users

This group has permissions to read, write, and delete content in the Projects and Portfolios categories.

For specific user tasks that can be performed, see “Model Management User Tasks” on page 61.

### Model Manager Users

This group has permission to read content in the Projects category.

For specific user tasks that can be performed, see “Model Management User Tasks” on page 61.

### SAS Services

This group enables members to export files on the Folders tab of SAS Management Console.

---

### Roles and Capabilities

#### About Roles and Capabilities

A role manages the availability of application features such as menu items and plug-ins. An application feature that is under role-based management is called a capability.

Certain actions are available only to users or groups that have a particular role. Any user or group who is a member of a role has all of that role’s capabilities.

Roles can contribute to one another. A role automatically includes all of the capabilities of a role that contributes to it.

Roles differ from permissions. In general, roles do not affect access to metadata or data.
**Predefined Roles and Capabilities for SAS Decision Manager**

Your installation includes several predefined roles for administrators and users of SAS Decision Manager. Depending on what software you have installed, you might have other predefined roles.

**Note:** The ability to access and update metadata is subject to permissions that are placed on that metadata. These roles do not affect permissions.

Table 6.3  Predefined User Roles and Capabilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decision Manager Common: Administration</td>
<td>Enables users to perform all Decision Manager Common tasks, including administering workflows. This role is assigned to the group Decision Manager Common Administrators and has the Decision Manager Common: Workflow category capability.</td>
</tr>
<tr>
<td>Business Rules Manager: All Capabilities</td>
<td>Enables users to create, edit, and delete all business rules content, including vocabularies, entities, terms, lookup tables, rule sets, and rule flows.</td>
</tr>
<tr>
<td>Business Rules Manager: Rule Flow and Rule Set Designer</td>
<td>Enables users to create, edit, and delete rule sets and rule flows.</td>
</tr>
<tr>
<td>Business Rules Manager: Rule Flow and Rule Set Read-Only</td>
<td>Enables users to view rule sets and rule flows.</td>
</tr>
<tr>
<td>Business Rules Manager: Vocabulary and Lookup Designer</td>
<td>Enables users to create, edit, and delete vocabularies, entities, terms, and lookup tables.</td>
</tr>
<tr>
<td>Business Rules Manager: Vocabulary and Lookup Read-Only</td>
<td>Enables users to view vocabularies, entities, terms, and lookup tables.</td>
</tr>
<tr>
<td>Model Manager: Administration Usage</td>
<td>Enables users to perform all model management tasks. For specific user tasks that can be performed, see “Model Management User Tasks” on page 61. This role is assigned to the group Model Manager Administrator Users and has the following Model Manager Plug-in capabilities by default:</td>
</tr>
<tr>
<td></td>
<td>Model Projects category</td>
</tr>
<tr>
<td></td>
<td>Model Portfolios category</td>
</tr>
<tr>
<td>Model Manager: Advanced Usage</td>
<td>Enables users to perform all model management tasks except for tasks that can be performed only by an application administrator. For specific user tasks that can be performed, see “Model Management User Tasks” on page 61. This role is assigned to the group Model Manager Advanced Users and has the following Model Manager Plug-in capabilities by default:</td>
</tr>
<tr>
<td></td>
<td>Model Projects category</td>
</tr>
<tr>
<td></td>
<td>Model Portfolios category</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Model Manager: Usage</td>
<td>Enables users to perform general model management tasks, such as viewing project and model information. For specific user tasks that can be performed, see “Model Management User Tasks” on page 61. This role is assigned to the group Model Manager Users and has the following Model Manager Plug-in capabilities by default:</td>
</tr>
<tr>
<td></td>
<td>Model Projects category</td>
</tr>
<tr>
<td>Comments: Administrator</td>
<td>Enables users to edit or delete comments. The ability to edit and delete comments is controlled by the capabilities under Applications ⇒ SAS Application Infrastructure ⇒ Comments in SAS Management Console.</td>
</tr>
<tr>
<td>Data Management: Lineage</td>
<td>Provides default access to the SAS Lineage application. This role is predefined, but it is not automatically added to the Decision Manager Users group. To enable SAS Decision Manager users to access SAS Lineage, add the Data Management: Lineage role to the Decision Manager Users group. See Adjust Group or Role Membership for instructions.</td>
</tr>
<tr>
<td>Decision Builder User</td>
<td>Enables users to read, create, edit, delete, and publish decisions in Decision Builder. Note: This role is predefined when you install a new deployment or migrate to SAS Decision Manager 3.1. If you upgrade to SAS Decision Manager 3.1, you must create this role. See “Create the Decision Builder User Role” on page 58 for more information.</td>
</tr>
<tr>
<td>Management Console: Advanced</td>
<td>Provides access to all plug-ins in SAS Management Console. This role is assigned to the group SAS Administrators.</td>
</tr>
<tr>
<td>Metadata Server: Operation</td>
<td>Supports adding metadata repositories and operating the metadata server. This role is assigned to the group SAS Administrators.</td>
</tr>
<tr>
<td>Metadata Server: User Administration</td>
<td>Supports management of users, groups, and roles other than the unrestricted users role. This role is assigned to the group SAS Administrators.</td>
</tr>
<tr>
<td>Metadata Server: Unrestricted</td>
<td>Provides all capabilities in SAS Management Console and provides access to all metadata. This role is assigned to the group SAS Administrator Users.</td>
</tr>
<tr>
<td>Visual Analytics: Data Building</td>
<td>Enables users to access SAS Visual Data Builder. This role is predefined, but it is not automatically added to the Decision Manager Users group. To enable SAS Decision Manager users to access SAS Visual Data Builder, add the Visual Analytics: Data Building role to the Decision Manager Users group. See Adjust Group or Role Membership for instructions.</td>
</tr>
</tbody>
</table>
Administering Group and Role Membership

To administer group and role membership, use the User Manager plug-in in SAS Management Console.

Viewing Roles and Capabilities in SAS Management Console

To view details about a role, open the User Manager plug-in in SAS Management Console, right-click the role, and select Properties. You can then view tabs that display the role’s members, capabilities, and contributing roles.

For example, the following display shows the capabilities for the Business Rules Manager: Rule Flow and Rule Set Designer role. These capabilities correspond to the description of this role in “Predefined Roles and Capabilities for SAS Decision Manager” on page 53.
Note: The preferred way to manage permissions for viewing vocabularies and lookup tables is by using capabilities under Vocabulary/Entity/Term and Lookup. The Manage Vocabulary/Lookup definitions capability is for compatibility with previous releases.

Note: Some roles have implicit capabilities that are not specified on the Capabilities tab.

The SAS Decision Manager capabilities control access to categories in the application. For example, the Rule Sets and Rule Flows categories do not appear when a user signs in to SAS Decision Manager if that user is not assigned to either of the following categories:

- Business Rules Manager: Rule Flow and Rule Set Designer
- Business Rules Manager: Rule Flow and Rule Set Read-Only

The Create or Update as well as the Delete capabilities control access to specific object types. You can combine the category capabilities with the object capabilities to control access at whatever level is needed. For example, if you want a user to be able to view and edit rule flows only, the user should have only the following capabilities:

- Manage Business Rule Flows and Rule Sets for the Business Rules Plug-in
- Create or Update as well as Delete capabilities for Rule Flow objects

The following table describes the icons used in the Properties window.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>None of the capabilities in this category have been specified for this role.</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>Some of the capabilities in this category have been specified for this role, either explicitly or through a contributing role.</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>All of the capabilities in this category have been specified for this role, either explicitly or through a contributing role.</td>
</tr>
</tbody>
</table>

Shaded check boxes indicate capabilities that come from contributing roles.

**Adding a User to a Group or Role**

In most cases, the best way to place a user in a role is to add the user to a group that belongs to the role. You can also add users directly to groups or roles.

To place a user in one of the predefined roles, you can add the user to one of the predefined groups. For example, to add a user to the Decision Manager Common: Administration role, add the user to the Decision Manager Common Administrators group.

For more information, see *SAS Management Console: Guide to Users and Permissions*.

**Creating New Groups and Roles**

The predefined groups and roles might be sufficient for many sites. Other sites might need to make application features available to users on either a broader or more granular basis than the predefined groups or roles allow.

You can use combinations of capabilities to create a new role. However, you can use only the capabilities that already appear in User Manager. You cannot create new capabilities.

For detailed information about roles and how to create them, see *SAS Management Console: Guide to Users and Permissions*. 
Modifying Roles

The User Manager plug-in in SAS Management Console enables you to modify roles by selecting or deselecting different capabilities.

**CAUTION!** No automated method can revert a role to its original set of capabilities. Instead of adjusting the capabilities of a predefined role, consider creating a new role. This advice is especially important if you need to make major changes.

If you modify a role, then follow these best practices:

- Do not rename the predefined roles. Renaming the predefined roles makes it difficult for SAS Technical Support to help you resolve problems.
- Keep a record of the changes that you make.

When modifying a role, you can use only the capabilities that already appear in User Manager. You cannot create new capabilities.

For more information about roles and how to modify them, see *SAS Management Console: Guide to Users and Permissions*.

---

Updating Groups and Roles for SAS Decision Manager 3.3

When you perform a migration or an upgrade, the groups, roles, and capabilities defined in SAS Management Console are preserved in case they have been customized for your site. To take advantage of new roles and capabilities available in SAS Decision Manager, you might need to modify the settings in SAS Management Console.

Enable Business Rules Folder Administration

**Note:** This information applies to all new installations, upgrades, and migrations. Enabling folder administration is optional.

A business rules folder administrator specifies which groups have certain permissions. These permissions include the ability to create and update top-level business rules folders and to modify the location of tests and test data for those folders. See “Create New Top-Level Folders” in *SAS Decision Manager: User’s Guide* for more information.

**Note:** After you enable folder administration, you must assign a group to any pre-existing folders. Any folder that has not been assigned a group is visible only to folder administrators.

Follow these steps in SAS Management Console:

1. Set the `brm.folder.config.enabled` property to `true`. See “Review Application Properties in SAS Management Console” on page 31 for more information.
   - **Note:** Setting `brm.folder.config.enabled` to `true` disables the ability to import and export business rules content. Business rules content includes business rules folders, vocabularies, terms, lookup tables, rule sets, and rule flows. You can override this restriction by setting `brm.import.restriction.override` to `true`.

2. Click the User Manager plug-in.


4. On the General tab, enter a name for the administrator role.
5 On the **Capabilities** tab, select **Business Rules Manager Web 3.3 ➔ Administration ➔ Folder Administration**.

6 On the **Members** tab, add the necessary identities to the role.

7 Click **OK**.

---

**Create the Decision Builder User Role**

**Note:** This information applies if you are upgrading to SAS Decision Manager 3.3 from any earlier release.

When you install a new deployment of SAS Decision Manager 3.3 or migrate to SAS Decision Manager 3.3 from an earlier version, the Decision Builder User role is predefined for you. If you are upgrading from your existing 2.1 or 2.2 deployment to SAS Decision Manager 3.3, you must create this role. For instructions about creating a new role in SAS Management Console, see [How to Create a Custom Role](#).

- On the **Capabilities** tab, add the Decision and Decision Test capabilities to the role. These capabilities are under Decision Manager 3.3.

- On the **Members** tab, add the Decision Manager Users group to the role.

---

**Update Administrator Groups and Roles**

**Note:** This information applies only if you are upgrading from SAS Decision Manager 2.1 to 3.3.

SAS Decision Manager 2.1 created the Decision Manager Common Administrator group and the Decision Manager Common: Administrator role. When you upgrade from SAS Decision Manager 2.1 to 3.3, the second pass of the SAS Deployment Wizard creates a new group named Decision Manager Common Administrators. It also creates a new role named Decision Manager Common: Administration.

Follow these steps in SAS Management Console:

1 Add the members of the Decision Manager Common Administrator group to the Decision Manager Common Administrators group.

2 Add the members of the Decision Manager Common Administrators role to the Decision Manager Common: Administration role.
3. Delete the old Decision Manager Common Administrator group and the old Decision Manager Common Administrators role.

See Adjust Group or Role Membership for more information.

**Configure the Ability to Import and Export Content**

SAS Decision Manager provides several macros for importing and exporting business rules content from the Decision Manager database. (Business rules content includes business rules folders, vocabularies, terms, lookup tables, rule sets, and rule flows.) You can limit the ability of users to run these macros by setting the correct properties and configuring identities in SAS Management Console. For more information, see “Macros Available with SAS Decision Manager” in SAS Decision Manager: Macro Guide.

**Control Access to the Import and Export Macros**

Perform the following steps in SAS Management Console:

1. Set the `brm.import.restriction.override` property to `true` if the `brm.folder.config.enabled` property is also set to `true`.

   **Note:** Setting `brm.folder.config.enabled` to `true` disables the ability to import and export business rules content. To override this restriction, set `brm.import.restriction.override` to `true`. See “Review Application Properties in SAS Management Console” on page 31 for more information.

2. Create a new group for users with full access. For example, create a new group named **Business Rules Admin Users**.

3. Add the new group as a member of the existing Decision Manager Users group. Members of the new group have the same access as members of the Decision Manager Users group. This access includes the ability to run the import and export macros and to update content through the user interface.

4. Create a second new group for users with limited access. For example, create a new group named **Business Rules NonAdmin Users**. Members of this group are able to update content through the user interface but are not able to run the import or export macros.

5. Create a run-time database user that has Read access to lookup tables only. This permission is the only one that is required to be able to run rules in SAS Decision Manager and in SAS Data Integration Studio. Follow the instructions for your database:
   - “Create a Run-time User for SAS Decision Manager Common Data Server” on page 60
   - “Create a Run-time User for Oracle” on page 60

6. Add a new logon credential for the run-time user to the second new group (**Business Rules NonAdmin Users**). Specify the user ID and password that were created in the previous step, and select the authentication domain `edm_db_auth`.

7. Add any additional roles or capabilities that are needed by members of the new group.
Create a Run-time User for SAS Decision Manager Common Data Server

Run the `createRuntimeUser` script for your operating environment. This script creates an identity that has Read permission only for lookup tables.

The script for Windows platforms is named `createRuntimeUser.bat`, and the script for UNIX platforms is named `createRuntimeUser.sh`. They are located in the following directory:

```
SASHome/SASDecisionManagerCommonDataServer/3.3/Config/Deployment/createUser
```

Note: This directory contains a README.TXT file that contains information about the parameters for these scripts.

When you run the script, substitute the correct values for the port number, host name, and user ID for your database. The script prompts you to enter a password. The syntax for these scripts is as follows:

```
createRuntimeUser.[bat | sh] SASHome port host admin db_name user_ID
```

- **SASHome** specifies the SAS Home installation directory location. In Windows operating environments, it is recommended that you enclose this parameter in double quotation marks.
- **port** specifies the port number of your database.
- **host** specifies the host name of the database.
- **admin** specifies the user ID of the database administrator for the database. This user ID must have access to all of the database content. You can find the correct value for this parameter in SAS Management Console. In SAS Management Console, select the **User Manager** plug-in. Right-click the **SAS Administrator** user, and select **Properties**. The user ID of the database administrator is the user ID for the **DecisionManagerComDataSvrCfg3.3Admin** domain.
- **db_name** specifies the name of the database. You can find the correct value for this parameter in the `SASCONFIG/Web/WebAppServer/SASServer7_1/conf/server.xml` file on the middle-tier server. Find the resource with the name `sas/jdbc/DecisionManagerDS`, and look for the value of the `url` attribute. The database name is the text after the final forward slash (/) in the URL. For example, if the attribute is `url="jdbc:postgresql://host:10482/dcmdb"`, then specify `dcmdb` for `db_name`.
- **user_ID** specifies a user ID for the new identity that will have Read permission only for lookup tables.

Create a Run-time User for Oracle

Ask your Oracle database administrator to perform the following tasks:

1. Create a new user and schema in Oracle and provide you with the new user ID and password.
2. Grant SELECT access to the following views for the new user in the SAS Decision Manager database.
   - `DCM_LOOKUP_VIEW`
   - `DCM_SELECTED_LOOKUP_VIEW`
3. Create synonyms in the new user’s default schema so that they can execute queries with unqualified references to those views.

```
CREATE SYNONYM DCM_LOOKUP_VIEW FOR @brm.schema.name@.DCM_LOOKUP_VIEW;
CREATE SYNONYM DCM_SELECTED_LOOKUP_VIEW FOR @brm.schema.name@.DCM_SELECTED_LOOKUP_VIEW;
```
Model Management User Tasks

Overview of Model Management User Tasks
When you work in SAS Decision Manager, the application administrator assigns your user ID to one of three SAS Decision Manager groups: Model Manager Administrators, Model Manager Advanced Users, and Model Manager Users. Groups can perform certain tasks within SAS Decision Manager. For example, users in the Model Manager Administrator group are the only users who can lock a version.

Users in the Model Manager Administrator Users group can perform all tasks in the Models category view. The Model Manager Advanced Users and Model Manager Users groups are more restrictive. See the tables in the subsequent sections for a list of tasks and the groups whose users can perform the task.

An application administrator can create custom groups for your organization as well as assign roles to those groups. The pre-defined roles enable specific users or groups to be assigned in order to complete specific tasks within SAS Decision Manager. In most cases, roles are assigned to groups. Three of the roles are general and correspond to the groups that are supplied by SAS Decision Manager. Contact your application administrator to find out your group and roles.

The following table lists the abbreviations for groups that are used in the task tables below:

<table>
<thead>
<tr>
<th>Group</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model Manager Administrator Users</td>
<td>MM Admin</td>
</tr>
<tr>
<td>Model Manager Advanced Users</td>
<td>MM Adv User</td>
</tr>
<tr>
<td>Model Manager Users</td>
<td>MM User</td>
</tr>
<tr>
<td>Decision Manager Users</td>
<td>DCM User</td>
</tr>
<tr>
<td>Decision Manager Common Administrators</td>
<td>DCM Admin</td>
</tr>
</tbody>
</table>

Setting Up SAS Decision Manager
Use the following table to determine the users who can complete the tasks to set up SAS Decision Manager:

<table>
<thead>
<tr>
<th>Task</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create users in SAS Management Console</td>
<td>SAS Administrator</td>
</tr>
<tr>
<td>Create data libraries in SAS Management Console</td>
<td>DCM Admin, DCM User, MM Adv User, MM Admin, SAS Administrator</td>
</tr>
<tr>
<td>Create data libraries in the Data category view</td>
<td>DCM Admin, DCM User, MM Adv User, MM Admin, SAS Administrator</td>
</tr>
<tr>
<td>Create channel location folders on a SAS server</td>
<td>MM Admin</td>
</tr>
<tr>
<td>Create SAS channels in SAS Management Console</td>
<td>SAS Administrator</td>
</tr>
</tbody>
</table>
### Setting Up Projects and Portfolios

Use the following table to determine the users who can complete the tasks to set up projects and versions in SAS Decision Manager:

<table>
<thead>
<tr>
<th>Task</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create folders</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create portfolios</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create projects</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create versions</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Delete folders, projects, and portfolios</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Archive and restore folders</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create and manage model and report templates</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td></td>
<td>Note: An MM Adv User must have Write permissions to save a new template or changes to an existing template. For more information, see “Verify WebDAV Folder Permissions for User-Defined Templates ” on page 15.</td>
</tr>
<tr>
<td>Create a workflow</td>
<td>MM User, MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Assign participants to a workflow</td>
<td>DCM Admin</td>
</tr>
<tr>
<td>View workflows that are associated with a version</td>
<td>DCM Admin</td>
</tr>
</tbody>
</table>

### Importing and Assessing Models

Use the following table to determine the users who can complete the tasks to import and assess models:
## Model Management User Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import models</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Configure model properties</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>View lineage and relationships for a model</td>
<td>MM User, MM Adv User, MM Admin</td>
</tr>
<tr>
<td></td>
<td>Note: To view the relationships for a model in the SAS Lineage application, the Data Management: Lineage role must be associated with a user or group the user is in.</td>
</tr>
<tr>
<td>Map model variables to project variables</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Run model comparison and model validation reports</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create user reports</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create aggregated reports</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create scoring output tables</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Create and run scoring tests</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Schedule a scoring test to execute</td>
<td>MM Adv User, MM Admin</td>
</tr>
</tbody>
</table>

### Deploying and Delivering Models

Use the following table to determine the users who can complete the tasks to deploy and deliver models:

<table>
<thead>
<tr>
<th>Task</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set a champion model</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Flag a challenger model</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Validate the champion model by running a scoring test using test data and reviewing the scoring output</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Lock or unlock versions</td>
<td>MM Admin</td>
</tr>
<tr>
<td>Publish a project or model to a SAS channel</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Extract a champion model from a SAS channel</td>
<td>any user who has the appropriate access rights to the SAS Metadata Repository</td>
</tr>
<tr>
<td>Publish a model to the SAS Metadata Repository</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Publish a model scoring function or model scoring files to a database</td>
<td>MM Adv User, MM Admin</td>
</tr>
</tbody>
</table>
Monitor Champion Model Performance and Retrain Models

Use the following table to determine the users who can complete the tasks to create and run the reports that are used to monitor the champion model performance and to retrain models:

<table>
<thead>
<tr>
<th>Task</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set project properties</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Monitor performance of project champion models that are within a portfolio</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Edit a performance definition</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Schedule a performance definition to execute</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Execute the performance definition</td>
<td>MM Adv User, MM Admin</td>
</tr>
</tbody>
</table>
| Run performance monitoring batch jobs                                | in **Test** mode: MM User, MM Adv User, MM Admin  
| | in **Production** mode: MM Adv, MM Admin                           |
| View monitoring reports and charts                                   | MM User, MM Adv User, MM Admin             |
| Delete performance data sets                                         | MM Adv User, MM Admin                      |
| Create and manage dashboard report definitions                       | MM Adv User, MM Admin                      |
| Generate dashboard reports                                           | MM Adv User, MM Admin                      |
| View dashboard reports                                               | MM User, MM Adv User, MM Admin             |
| Edit a model retrain definition                                      | MM Adv User, MM Admin                      |
| Execute or schedule a model retrain definition                       | MM Adv User, MM Admin                      |
| View retrained models and the associated model comparison reports    | MM User, MM Adv User, MM Admin             |

General Tasks

Use the following table to determine the users who can complete these general tasks:

<table>
<thead>
<tr>
<th>Task</th>
<th>Group or Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add attachments and comments</td>
<td>MM User, MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Search for models</td>
<td>MM User, MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Set the status of a project champion model and challenger models</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>Task</td>
<td>Group or Role</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Replace a champion model</td>
<td>MM Adv User, MM Admin</td>
</tr>
<tr>
<td>View workflow tasks</td>
<td>MM User, MM Adv User, MM Admin</td>
</tr>
<tr>
<td></td>
<td>A user must be the actual owner of a task or assigned the workflow participant role of potential owner or business administrator to view tasks in the My Tasks category</td>
</tr>
<tr>
<td>Work with workflow tasks</td>
<td>MM User, MM Adv User, MM Admin</td>
</tr>
<tr>
<td></td>
<td>A user who is a workflow participant can claim, release, and complete tasks.</td>
</tr>
</tbody>
</table>
Managing Data Tables with SAS Management Console

Access Data Tables from SAS Decision Manager .......................................................... 67
Create a SAS Library ........................................................................................................ 67
Register Tables .................................................................................................................. 68
Delete a Data Table .......................................................................................................... 69

Access Data Tables from SAS Decision Manager
To access a data table from SAS Decision Manager, you must register the tables in the SAS Metadata Repository and add the tables as data sources in SAS Decision Manager. You use SAS Management Console to create libraries and register tables.

1 If the library where you want to register your data table does not already exist, complete the steps in “Create a SAS Library”.

2 Register tables. Registering tables imports table metadata into the SAS Metadata Repository and associates the tables with the newly created SAS library.

3 Add registered tables to the list of data sources in SAS Decision Manager. This makes the tables available to SAS Decision Manager.

Note: You can delete data tables from the SAS Metadata Repository only by using SAS Management Console. Data tables that are removed from SAS Decision Manager using the Data category view remain in the SAS Metadata Repository. For more information, see “Delete a Data Table” on page 69.

Create a SAS Library
To create a new SAS library in SAS Management Console:

1 Start SAS Management Console and connect to your preferred SAS Metadata Repository.

2 In the SAS Management Console tree, expand Environment Management ➔ Data Library Manager ➔ Libraries.

3 Right-click the Libraries folder, and select New Library.
In the folder display, ensure that the folders are expanded for Resource Templates ➔ Libraries ➔ SAS Data. Select SAS BASE Library and then click Next.

Note: You might want to register tables from a database, especially for the SAS High-Performance Analytics procedures. You can select the Teradata Library or Greenplum Library, instead of the Base SAS Library. For more information about creating database tables, see the SAS Management Console Help.

Enter a name, description, and location for your new SAS library, and then click Next.

(Optional) Select the SAS server where the new library is to be assigned, and then click Next.

Enter a unique SAS library reference name (a libref) of eight characters or fewer. You use the SAS libref to access the table.

Use the arrows to choose a path from the Path Specification Available items box, or click New to specify a new path for your library. Afterward, your library path specification appears in the Path Specification Selected Items list. Click Next.

Review the summary of the information that you entered, and if it is correct, click Finish.

SAS Management Console adds the new library to the SAS Metadata Repository. You can now register new tables in this library by using SAS Management Console.

**Register Tables**

The Register Tables wizard guides you through the process of importing and registering a SAS data table in the SAS Metadata Repository. Each library type has a different Register Tables wizard that is called from the Data Library Manager.

Note: The Register Tables wizard is not available on UNIX platforms.

To import and register a table into a SAS Management Console Data Library:

1. Copy the .sas7bdat file for your table into the directory path on the SAS Workspace Server that you provided in the Path Specification data field of the New Library Wizard.

2. Start SAS Management Console, and connect to the SAS Metadata Repository that contains your new SAS library.

3. In the SAS Management Console tree, expand the following folders:
   - Environment Management ➔ Data Library Manager ➔ Libraries

4. Right-click the SAS library name that you want to import your table into, and then select Register Tables from the pop-up menu.

5. Verify that the information that is displayed in the Select a SAS Library page is correct, and then click Next.

6. If prompted, enter your SAS user ID and password to log on to your SAS server.

7. The Default Application Server dialog box might appear if the selected folder location is User Folders or if a default application server has not been previously selected. Select your SAS server, click Test Connection to verify that the connection to the server is successful, and then click OK.

8. The Define Tables and Select Folder Location page is displayed. Select the table or tables that you want to register, and then click Next.

9. Click Finish.
The metadata for the imported table is written into the SAS Metadata Repository and is associated with the selected SAS library.

Note: You must create folders with appropriate access permissions so that users can manage their models, create reports, and publish model updates. If a SAS Decision Manager user does not have the appropriate permissions to access a folder, then the tables and libraries cannot be viewed in the Data category of SAS Decision Manager. For more information about creating a folder and setting permissions, see the SAS Management Console Help.

You can add registered tables to the list of data sources in SAS Decision Manager. For more information, see “Add Registered Tables From Metadata” in SAS Decision Manager: User’s Guide.

Note: SAS Decision Manager does not provide a way to modify the structure of a data table. If a data table is modified externally (by using SAS Management Console, for example), then the existing jobs in SAS Decision Manager might stop functioning. For more information, see SAS Management Console Help or SAS Intelligence Platform: System Administration Guide.

---

Delete a Data Table

Data tables can be deleted only from the SAS Metadata Repository using SAS Management Console. Data tables that are removed from SAS Decision Manager using the Data category view still remain in the SAS Metadata Repository. If the data table’s metadata is deleted from the SAS Metadata Repository using SAS Management Console or the operating system, SAS Decision Manager cannot access the data table to view data or to perform any reporting or scoring tests. In this case, an error message appears.

Note: Only a SAS administrator or a user with Delete permission can delete data tables using SAS Management Console.

To delete a data table in SAS Management Console:

3. Select the library that contains the data table that you want to delete.
4. Right-click the data table name in the right pane, and then select Delete from the pop-up menu.
5. Click OK to delete the data table. The data table is removed from the SAS Metadata Repository library, but it is not physically removed from the operating system.

For more information, see SAS Management Console Help or SAS Intelligence Platform: System Administration Guide.
Configuring SAS Workflow for Use with SAS Decision Manager

Overview

SAS Workflow provides services that work together to model, automate, integrate, and streamline business processes. It provides a platform for more efficient and productive business solutions.

SAS Workflow is used by SAS solutions that benefit from business process management. SAS Workflow Studio is a desktop client application that is used to design and deploy workflow definitions. The SAS middle tier hosts the workflow engine and the workflow services as part of the SAS Web Infrastructure Platform. SAS Decision Manager is used to manage the workflows that are associated with versions. For more information about SAS Workflow, see “SAS Workflow” in SAS Intelligence Platform: Middle-Tier Administration Guide.

Prerequisites for Using SAS Workflow

To use SAS Workflow with SAS Decision Manager, be sure the following prerequisites are met:

1. SAS Workflow Engine, SAS Workflow Services, and SAS Workflow Studio must be installed and configured. For more information, see SAS Intelligence Platform: Installation and Configuration Guide.

2. If you want to receive notifications for a workflow, you must configure alert notifications using SAS Management Console. For more information, see “Configure Alert Notifications for SAS Workflow” on page 75.
3 The **Workflows category** capability (under **Decision Manager 3.3 ▸ Decision Manager Common**) must be selected for the Decision Manager Common: Administration role. See “**Administering Group and Role Membership**” on page 55 for more information.

4 Users must be a member of the Decision Manager Common Administrators Group or of another user group that is associated with the Decision Manager Common: Administration role.

5 In SAS Web Administration Console, the users or groups must be assigned to a workflow template management role. For more information, see [Deploying and Maintaining Workflows](#) in *SAS Workflow Studio: User’s Guide*.

6 Workflow definitions must be created using SAS Workflow Studio. For more information about creating workflow definitions, see [Defining Workflows with SAS Workflow Studio](#) in *SAS Workflow Studio: User’s Guide*.

### Guidelines for Creating Workflow Definitions

When you create workflow definitions in SAS Workflow Studio to use with SAS Decision Manager, follow these guidelines:

- Participants, and policies must be added to the task level. Statuses added at the task level and the default statuses at the workflow definition level can be used for a task status. Data objects can be added at the workflow definition level or task level. Users can see only the data objects defined at the task level from the Workflows category in SAS Decision Manager.

- Only the Potential Owner and Business Administrator workflow roles are used by SAS Decision Manager and they can be used in either a participant or swimlane definition. The Actual Owner workflow role should not be used as part of a workflow definition.

- In order to assign additional participants to tasks in SAS Decision Manager, the user must have or be in a group that is assigned the workflow role of Business Administrator. Also, in order to manage workflows and assign participants, the user must be in:
  - the Decision Manager Common Administrators group
  - in a group that is a member of the Decision Manager Common Administrators group
  - in a group that is associated with the Decision Manager Common Administration role in SAS Management Console.

  The following groups are created at installation time:
  - Decision Manager Common Administrators Group
  - Decision Manager Users Group

- Only workflow definitions that are activated in the Workflow repository, that are associated with the `mmapi` tag attribute in the file properties, are available to SAS Decision Manager.

### Add the Approval Attribute to a Status

To add the **Approval** attribute to a status:

1. Expand the **Statuses** folder in the **Workflow Tree**.
2. Right-click a status and select **Edit**.
3 Click Attributes.

4 Click Add and enter the following values for the new attribute.
   
   **Key**
   
   Approval
   
   **Note:** This key is case-sensitive.
   
   **Value**
   
   true

5 Click OK twice to save.

**Make Workflow Definitions Available to SAS Decision Manager**

After you have created a workflow definition in the SAS Workflow Studio, you must make the workflow definition available to SAS Decision Manager.

To save the workflow definition to the Workflow repository:

1 Save the workflow definition to your local drive.

2 Log on to the server.

3 Add the tag attribute of `mmapi` to the workflow definition file properties.

4 Upload the workflow definition.

5 Verify that the workflow definition is available in the Workflows category.

For more information, see Deploying and Maintaining Workflows in SAS Workflow Studio: User’s Guide.

**Log On to the Server**

With SAS Workflow Studio, you are limited to managing locally stored workflow definitions on your system until you have logged on to the SAS Content Server. After you are connected, you can access additional workflow definitions that are stored in the SAS Content Server.

To log on to the server:

1 Select Server ⇒ Log On.
In the Log On window, select the host-name from the **SAS environment** drop-down list.

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

Enter a user ID and password, and click **Log On**.

Click **OK** if a confirmation message appears.

---

### Add Tag Attributes to a Workflow Definition

Only those workflow definitions in the Workflow repository that contain the **mmapi** tag attribute in the file properties are available to SAS Decision Manager.

To add a tag attribute to the file properties of a workflow template in SAS Workflow Studio:

1. Select **File ➔ Properties** and click **Add**.
2. Enter the tag value of **mmapi**.
   
   **Note:** The file properties are case sensitive. This value must be lowercase.
3. Click **OK** twice.

---

### Upload a Workflow Definition

To upload a workflow:

1. From the **Server** menu, select the **Save to Repository** menu option. The **Save to Workflow Repository** window appears.
2. (Optional) Enter relevant comments to associate with the workflow definition.
3. Select the **Activate** option if you want to activate the current version in the Workflow repository.
4. Click **OK**.
5. Click **OK** if confirmation messages appear.

---

### Verify That the Workflow Definitions Are Available In SAS Decision Manager

To verify that the workflow definitions are available in the Workflows category view of SAS Decision Manager:

1. Enter the URL `http://hostname:port/SASDecisionManager` in your web browser.
2. Enter the user ID and password for a user that is in the Decision Manager Common Administrators Group or a user group that is associated with the Decision Manager Common: Administration role.
3. Verify that the uploaded workflow definition is available in the Workflows category view.
   
   a. Click `.navigate` to navigate to the Workflows category view.
   
   b. Click `.load` and select **Set mappings**. The Set Mappings window appears with a list of the available workflow definitions.

For more information, see **"Set Mappings" in SAS Decision Manager: User’s Guide.**
Migrating Workflows

When you migrate or upgrade from SAS Model Manager 12.3, workflows are not migrated. If you upgrade or
migrate from SAS Decision Manager 2.2 or later, the all active (in progress) or completed workflows are
automatically migrated when a workflow administrator opens the Workflows category view. However, the
workflows must be associated with a valid UUID for a version of a project or rule flow. Also note that only
workflows that are associated with a project or rule flow that still exists are migrated. If the project or rule flow
was deleted or terminated, the associated workflow is not migrated.

Configure Alert Notifications for SAS Workflow

To enable workflow participants to receive alert notifications from SAS Workflow, you must configure the E-mail
notification type in SAS Management Console. After you have configured the alert notifications, you can then
use the Notify Participant policy and other workflow notification policies for workflow tasks in SAS Workflow
Studio. The notifications setting in SAS Management Console is a global setting. Preferences and notifications
can also be configured for individual users.

The Send Notification By Data Object policy in SAS Workflow Studio integrates with the SAS Web Infrastructure
Platform's Notification Service. Recipients are notified according to their preferences (email or portlets).

1 Log on to SAS Management Console as an administrator.

2 On the Plug-ins tab, navigate to Application Management ➔ Configuration Manager ➔ SAS Application
Infrastructure.

3 Right-click SAS Application Infrastructure and select Properties.

4 Click the Settings tab.

5 Select Notifications in the left panel. Use the menus or text fields to set the property.

6 Select the E-mail notification type.

7 Click OK.

8 To apply this setting and make it available, restart the SAS Web Infrastructure Platform Services, SAS
Shared Services, and applications using SAS Workflow.

For more information about the notification properties, see “Set Global Properties for SAS Applications” in SAS
Intelligence Platform: Middle-Tier Administration Guide. For more information about setting the notification
policies for SAS Workflow, see the SAS Workflow Studio Help or SAS Workflow Studio: User’s Guide.
Configuring Publication Channels

Overview of Configuring Publication Channels
SAS Decision Manager uses the SAS Publishing Framework to publish model updates to an operational environment for testing and production. The SAS Administrator creates and configures definitions for channels, content subscribers, and group subscribers. Then the user can use the SAS Decision Manager model extraction macros or user-written SAS code to retrieve and deploy the updated models to the operational environment.

As shown in the following figure, several tasks are necessary to configure and use the SAS Decision Manager publishing functionality.
Here are the tasks.

1. The application administrator creates either an archive or a WebDAV persistent storage location for channels that is accessible from the SAS Workspace Server.

2. The application administrator creates users, HTTP servers, content subscribers, and channels using SAS Management Console.

3. The application administrator or an advanced user publishes models using SAS Decision Manager.

4. The content subscriber (for example, Scoring personnel) receives an email notification from the server that contains a channel content update.

5. The content subscriber extracts models from a channel (for example, on a SAS Content Server) to prepare them for scoring.

Note: SAS Management Console Help provides details for your SAS Decision Manager publishing configuration options.

It is recommended that at first you use channels that have the Archive File type for the persistent storage option. This is the simplest channel definition and configuration to use to publish directly to your operational testing or production scoring servers. For example, during the installation of SAS Decision Manager, a channel that has a persistent store Archive File type is created. The channel is called MMChannel. For more information, see “Create a New Channel” on page 84.
When the SAS Web Application Server and the SAS Workspace Server are located on different physical machines, the Software Deployment Wizard creates a directory on the SAS Web Application Server machine and uses that value for the App.ChannelDir property value. You must create a directory that is accessible by the SAS Workspace Server, and the SAS Decision Manager users must have permissions to that directory. For more information, see “Modify an Existing Channel or Channels Node Location” on page 86.

Define an HTTP or HTTPS Server

The SAS Decision Manager installation process by default defines a SAS Web Server and a SAS Content Server. Use this process to add additional HTTP or HTTPS servers. A WebDAV-enabled HTTP or HTTPS content server must be defined in SAS Management Console before you can publish to channels from SAS Decision Manager. The server is usually a third-party server such as Microsoft Internet Information server or an Apache server.

Note: You must have WriteMetadata permission for a repository in order to define an HTTP or HTTPS content server for that repository.

To define your HTTP or HTTPS content server:

1. Start SAS Management Console. Open your existing connection profile for your server. If your connection profile is not available in the list, see SAS Management Console Help.
2. From the Plug-ins tab, right-click Server Manager, and then select New Server.
3. Select Resource Templates → Servers → Content Servers → Http Server, and then click Next.
   Note: If the HTTP server template is not available, then you must add the resource template. For more information, see the SAS Management Console Help.
4. Enter the name and the description of your HTTP server. Click Next.
5. (Optional) On the server properties page, enter the software version and vendor information for the third-party HTTP or HTTPS server that you are defining.
6. Click New to create a base path or paths on your server.
   Note: If you have not defined the base path for your HTTP server, see “Define Publish Locations for the SAS Content Server” on page 80.
7. In the Base Path field, specify the location of the top-level directory where report content items such as report definitions or image files are stored. (This path must be set up as an alias on the web server.) The Description field is optional.
8. Select the Supports WebDAV option and then click OK to save your settings. The new base path appears in the Base Path(s) field of the server properties page.
9. Click Next.
10. Enter the connection properties for your HTTP server:
    a. Select DefaultAuth from the list. When you click New to create a new domain, a dialog box appears. Enter the name and description of your domain.
    b. Enter the fully qualified name or the IP address of your server.
    c. Enter a port number (for example, 8080 for a web application server).
11. Click Next. The New Server Wizard window displays a summary of the settings for the new server and indicates that you have successfully completed the definition of a new server.
12 Click **Finish**. Your new server is displayed under the **Server Manager** node in the SAS Management Console Navigation Tree.

**See Also**
- SAS Management Console Help
- *SAS Intelligence Platform: Middle-Tier Administration Guide*

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**Define Publish Locations for the SAS Content Server**

During the SAS Decision Manager installation process, the **ModelManager**, **sasfolders**, and **sasdav** WebDAV folders are automatically created on the SAS Content Server. You can use the SAS Content Server Administration Console (SCS Admin Console) to create a new publishing location for the WebDAV folder or to control access to an existing WebDAV folder. If you need to define a new WebDAV-enabled HTTP content server after the initial installation of SAS Decision Manager, then you must define a publishing location. For more information, see "Define an HTTP or HTTPS Server" on page 79.

**Note:** Although you can add a folder to the **sasfolders** location, the folder that you add is not added to the SAS Metadata Server.

**TIP** The best practice is to add folders to metadata using SAS Management Console.

To define a new publishing location:

1. **Access the SAS Content Server Administration console** by entering the following URL in your web browser and substituting the server name and port number of your SAS Content Server: `http://server-name:port/SASContentServer/dircontents.jsp`.

   **Note:** The default port number for the SAS Web Application Server is 80 for a UNIX environment and 7980 for a Windows environment.

2. **Sign in to the console as an unrestricted user** (for example, SAS Administrator). The SCS Admin Console window appears.

3. **Enter a name for the folder in the text box and then click **Add folder** to create a new location for publishing channels.**

4. **(Optional) To create a subfolder, select the folder that you created in the previous step, enter a name for the subfolder in the text box, and click **Add folder**.**

   **Note:** Use the breadcrumb trail above the list to return to a parent folder.
To set permissions for a folder:

a. Click the permission icon next to the item that you want to modify. The Permissions page appears.

b. For each principal that is listed, modify the permissions by changing each permission to Yes or No.

c. To add more principals to the page, do one of the following:
   - If you know the principal's name, enter it in the field and click Save changes.
   - Click Search for Principals to search for a name. When you find the principal that you want to add, select the check box that is next to the principal's name and then click Return.

After the principal's name appears on the permission page, you can set permissions for the principal.

Note: For more information about administering the SAS Content Server, see SAS Intelligence Platform: Web Application Administration Guide.

---

Configuring Channels and Subscribers for SAS Decision Manager

Overview of Configuring Channels and Subscribers

The Publishing Framework plug-in to SAS Management Console enables you to administer the Publishing Framework.

Note: You need to verify that Publishing Framework plug-ins are available in your SAS Management Console navigation tree. If the plug-in is not available, you need to install SAS Foundation Services 1.3 or later so that you can configure your channels and subscribers for SAS Decision Manager.

With the Publishing Framework plug-in, you can manage subscribers and channels. For more information, see the Help.

When the Publishing Framework plug-in is available, the SAS Management Console Project Tree should look as follows:
The SAS Metadata Server (for example, Foundation) that is shown under the Publishing Framework plug-in contains the Subscribers folder and the Channels folder.

The Publishing Framework plug-in to SAS Management Console provides wizards that enable you to create subscribers. When you create a subscriber with a wizard, the subscriber object that has the specified attributes is stored on the SAS Metadata Server.


Channel to Subscriber Configuration

There are several ways to configure channels to publish your models to the channel subscribers.

Choose one of these options to define the method to use for publishing channels:

1. **None** - specifies to publish all content that is published to the channel directly to the subscribers (through e-mail). The content is not persisted.

2. **Archive** - specifies a path and an optional logical server for the location of the persistent storage. The Archive File option is recommended for publishing model packages. Publishing Framework publishes the content as an archive (binary) SPK (SAS package) file to the persistent storage location.

3. **WebDAV** - specifies the WebDAV server location.

   **TIP** The best practice is to use the Archive File type for channel persistent storage and e-mail for subscriber notification.

Before publishing models using SAS Decision Manager, you must create channels and subscribers to publish your model updates.

Creating Channels and Subscribers

The channel sends the information from the publishers to the subscribers who want it.
A subscriber is a person or a program that has a need for information that is published. To receive information from a channel, the user must be defined as a subscriber.

The Publishing Framework plug-in provides wizards that enable you to create subscribers. Information about the subscriber is stored on the SAS Metadata Server.

Note: Channel subscribers must be users of the SAS Metadata Server and their e-mail addresses must be specified.

---

**Create a Channel Folder**

If you expect to create a large number of channels, then consider grouping related channels into channel folders. You can create subfolders within folders, thereby creating a folder hierarchy to which access controls can be applied. For more information, see the SAS Management Console Help.

Note: Currently it is not possible to move an existing channel into a folder or from one folder to another. Plan ahead to avoid deleting and re-creating channels.

To create channel folders:

1. From the SAS Management Console navigation tree, expand the **Publishing Framework** node.
2. Select and expand the desired metadata repository node.
3. If you are creating a top-level folder, then select **Channels**. If you are creating a subfolder, then navigate to and select the desired parent folder.
4. Right-click **Channels** and then select **New Folder**.
5. Enter a name for the new channel folder and then click **Next**. The new folder is created and the metadata definition information is displayed.
6. Click **Finish**.
Create a New Channel

To create a new channel:

1. From the SAS Management Console navigation tree, expand the Publishing Framework node.
2. Select and expand the desired metadata repository node.
3. If you are creating a channel within a folder, select the Channels node and navigate to the desired folder.
4. Right-click Channels or the desired channel folder and select New Channel.
5. Specify the name of your channel and click Next.
6. Use the arrow button to associate content subscribers with this channel to be notified at publish time. Click Next.
7. Select Archive.
8. Select File for Archive Type and enter the path of your publish location. Click Next.
   - The information window appears, providing a summary of the input and status of successful completion of the channel creation.
   - Note: Two other types, HTTP and FTP, are available for you to select from the list.
9. Click Finish. The new channel name is displayed under the Channels node of SAS Management Console.

For more information, see the SAS Management Console Help or SAS 9.4 Publishing Framework: Developer’s Guide.

Create a New Subscriber

SAS Decision Manager supports only the content subscriber and the Name/Value pair filter for filtering. You can publish to a channel even when the channel does not have any associated subscribers. SAS Decision Manager users can extract contents from a channel if they are not subscribers of the channel. However, only subscribers of a channel can receive notifications. You can also create a subscriber group that contains individual subscribers or other subscriber groups. For more information, see the SAS Management Console Help.

To create a new content subscriber:

1. Expand the Publishing Framework node in the SAS Management Console navigation tree.
2. Select the desired metadata repository node.
3. Select Subscribers ⇒ Content Subscribers.
4 Right-click **Content Subscribers** and select **New Content Subscriber**.

5 Specify a name and a description for this subscriber. The name must be unique within its parent folder. The description is optional. Click **Next**.

6 Click **Select** to associate a person with this subscriber.

7 The search filter enables you to search the repository for users whose names either contain or are equal to a string that you specify. Enter the string in the text field, select either **contains** or **equals** from the list, and click **Search**. A list of users whose names meet your search criteria appears in the **Available People** list.

8 If the desired user does not exist in the repository, then click **New User** to define that user. Then, select the desired user from the **Available People** list and click **OK**.

9 Click **Next**.

10 Select the subscriber's delivery transport and then specify the attributes. Click **Next**.

11 Specify one or more filters to eliminate content that the subscriber does not want to receive. To add a filter, click the tab that corresponds to the type of filter (Name/Value, Entry, or MIME Type). Select **Inclusion** or **Exclusion** and then click **Add** to specify the filter criteria.

12 Click **Next**.

13 Review the subscriber specifications. Click **Back** to make any corrections. Click **Finish** when you are satisfied with your selections.

For more information, see the Help or **SAS 9.4 Publishing Framework: Developer's Guide**.
Modify an Existing Channel or Channels Node Location

Modify the Directory Location for the Channels Node

To change the location of the application channels directory:

1. From SAS Management Console, expand the Application Management node on the Plug-ins tab.
2. Select and expand Configuration Manager ➔ SAS Application Infrastructure ➔ Enterprise Decision Manager 3.3.
4. Click the Advanced tab to modify the application channels directory. Change the property value for App.ChannelDir to a directory that is accessible by the SAS Workspace Server.
5. Click OK.

Modify the Persistent Store Directory Location for a Channel

To modify the location of the persistent store directory path for a channel:

1. From the SAS Management Console navigation tree, expand the Publishing Framework node.
2. Select and expand the desired metadata repository node.
3. If you are modifying a channel within a folder, select the Channels node and navigate to the desired folder.
4. Right-click the name of the channel that you want to modify, and then select Properties.
5. Click the Persistent Store tab, and modify the archive file path and server location.
6. Click OK.

See Also
SAS Management Console Help
Overview of Post-migration Macros

After migrating a SAS deployment from one UNIX operating system to another, use the SAS Decision Manager post-migration macros. The macros ensure that all data, content, and link and filename references that are used by SAS Decision Manager are accessible by the new SAS 9.4 deployment. This section describes what action each macro performs and the syntax that is used by the macros. For more information, see “Migrate Model Information to a New Operating System” on page 47.

%MM_migrationStep1 Macro

%MM_migrationStep1 macro ports all catalogs and SAS data sets from the source server into .cpo and .dpo files, and then places them in a user-specified directory.

```sas
options metaPort=8561
metaServer=server-address
metaRepository=Foundation
metaUser=user-ID
metaPass=password;
filename mycode catalog "sashelp.modelmgr.migration.source";
%include mycode;
filename mycode;
%MM_migrationStep1(
    Server = mySourceServer,
    PortNumber = port,
    User = mmUser,
    Password = mmPassword,
    ServiceRegistryURL = serviceRegistryURL,
    TargetDir= \network\port);
```
The metadata system options are required only if you are migrating SAS Decision Manager 3.2 from one UNIX system to a different type of UNIX system. For more information, see “Connection Options” in SAS Language Interfaces to Metadata.

**Server**

specifies the server name or multicast address for the migration source server that hosts the model repository. This argument is ignored for a SAS Decision Manager 2.2, 3.1, or 3.2 to 3.3 migration, which uses the ServiceRegistryURL argument.

Example: Server=myserver.com

**PortNumber**

specifies the port number for the migration source server that hosts the model repository. This argument is ignored for a SAS Decision Manager 2.2, 3.1, or 3.2 to 3.3 migration, which uses the ServiceRegistryURL argument.

Example: PortNumber=6411

**User**

specifies a valid SAS Decision Manager user to access migration source server.

**Password**

specifies the password for the SAS Decision Manager user to access migration source server.

**ServiceRegistryURL**

specifies the service registry URL for the SAS Metadata Server. This argument is used when migrating from a SAS 9.4 system to another SAS 9.4 system.

**TargetDir**

specifies the directory where all of the portable files are saved.

Example: TargetDir=\network1\transfer

---

%MM_migrationStep2 Macro

%MM_migrationStep2 macro imports all of .cpo and .dpo files into the target server.

options metaPort=8561
metaServer=server-address
metaRepository=Foundation
metaUser=user-ID
metaPass=password;
filename mycode catalog "sashelp.modelmgr.migration.source";
%include mycode;
filename mycode;

%MM_migrationStep2(  
  User = mmUser,  
  Password = mmPassword,  
  ServiceRegistryURL = serviceRegistryURL,  
  SourceDir=\network\port,  
  TargetDir= myTargetDIR );

For more information, see “Connection Options” in SAS Language Interfaces to Metadata.
User

specifies a valid SAS Decision Manager user to access migration target server.

Password

specifies the password for the SAS Decision Manager user to access migration target server.

ServiceRegistryURL

specifies the service registry URL for the SAS Metadata Server. This argument is used when migrating from a SAS 9.4 system to another SAS 9.4 system.

SourceDir

specifies the directory where all portable files are saved.

Example  SourceDir=\\network\transfer

TargetDir

specifies the directory where the migration result table is saved. Here is an example:

TargetDir=\\network1\migration

---

**%MM_migrationStep3 Macro**

%MM_migrationStep3 macro converts a project’s performance data to the 14.3 format. The performance data is converted for all versions within the projects that are being migrated.

options metaPort=8561
metaServer=server-address
metaRepository=Foundation
metaUser=user-ID
metaPass=password;
filename mycode catalog "sashelp.modelmgr.mm_migration.source";
%include mycode;
filename mycode;
libname _mmlib "SAS-configuration-directory\Levnn\AppData\SASModelManager14.3\Dashboard\Data";
%MM_migrationStep3(
    User = mmUser,
    Password = mmPassword,
    DashboardReportDataLib= _mmlib);

For more information, see “Connection Options ” in SAS Language Interfaces to Metadata.

User

specifies a valid SAS Decision Manager user to access the migration target server.

Password

specifies the password for the SAS Decision Manager user to access the migration target server.

DashboardReportDataLib

specifies the libref for the Dashboard directory path on the migration target server.

Example  DashboardReportDataLib=_mmlib