

# Installation Instructions

## SAS<sup>®</sup> Activity-Based Management Server Software 6.1 for Windows

### Pre-installation Checklist

Before you start to install or upgrade SAS Activity-Based Management Server, please follow these steps:

1. Review all the items enclosed in your product package.
2. Ensure that your computer meets all the specifications indicated in the System Requirements contained in your product package.
3. The person who installs SAS Activity-Based Management Server must be a user in the local machine Administrators group. Being a member of the Domain Admins group is not sufficient.
4. SAS recommends that you do not install on a computer running Terminal Services in application server mode. Remote administration mode is acceptable. The following note is from Microsoft:

As for BackOffice Servers, it is not recommended that you install Terminal Services in application server mode on a server that is already dedicated to the task of running infrastructure services, such as DNS, WINS, or File and Print, or server applications such as IIS, Exchange or SQL. Client applications running under Terminal Services on these servers can severely impact the performance and scalability of these servers.

### *Verify the operating system*

1. On the desktop, display the properties for **My Computer**.
2. On the **General** tab, verify that the **System** section lists the operating system and service pack number noted in the System Requirements.
3. If either is not correct, install or upgrade now, then continue with the installation.

### *Verify the Web service*

1. Open **Computer Management** in the **Control Panel**.
2. On the **Tree** tab, expand **Services and Applications**.
3. If you do not see **Internet Information Services**, IIS is not installed. Install it now, then continue with the installation.

4. Right-click **Internet Information Services** and select **Help**.
5. In **Microsoft Management Console Help**, in the right pane, click the product documentation URL in the first paragraph. A browser window with IIS documentation opens.
6. If you do not see a title that reflects the version noted in the System Requirements, it probably is not installed. Upgrade now, then continue with the installation.

### ***Verify the Web browser***

1. Start **Internet Explorer**.
2. Select **Help**→**About Internet Explorer**.
3. Verify that the **Version** meets the specification in the System Requirements.

### ***Verify the correct Microsoft SQL Server version***

1. Start **Computer Management** in the **Control Panel**.
2. Expand **Services and Applications**.
3. If you do not see **Microsoft SQL Servers**, it is not installed. Install it now, then continue with the installation.
4. Expand **Microsoft SQL Servers**.
5. Right-click the server name and select **Properties**. The **SQL Server Properties** dialog box opens.
6. On the **General** tab, verify that the **Product** and **Product version** meet the specifications in the System Requirements. The service pack number is listed in parentheses after the product version number.
7. If either is not correct, install or upgrade now, then continue with the installation.

### ***Verify the Microsoft SQL Server mixed mode authentication***

1. Complete the previous procedure to display the **SQL Server Properties** dialog box for SAS Activity-Based Management Server.
2. Click the **Security** tab.
3. In the **Security** section, for **Authentication**, select **SQL Server and Windows**.
4. In the **Startup service account** section, select **System account** (if it can start the SQL services) or **This account**.
5. If you selected **This account**:
  - a. Type a login that has system administrator privileges.
  - b. Type the **Password**.

### ***Verify Microsoft Message Queuing (MSMQ)***

SAS Activity-Based Management will function properly if MSMQ is configured as either an Independent Server or as an Active Directory Integrated Server.

1. Start **Computer Management** in the **Control Panel**.
2. Expand **Services and Applications**.
3. If you do not see **Message Queuing**, it is not installed. Install it now, then continue with the installation.

### ***Verify the correct version of Microsoft Analysis Services (MSAS)***

1. Select **Start**→**Programs**→**Microsoft SQL Server**→**Analysis Services**→**Analysis Manager**.
2. If you do not see **Analysis Services**, MSAS is not installed. Install it now, then continue with the installation.
3. In the **Analysis Manager**, right-click **Analysis Servers** and select **About Analysis Services**.
4. Verify that the **Version** meets the specifications in the System Requirements.
5. If the service pack is not installed, install it now, then continue with the installation.

### ***Migrate the MSAS repository***

We recommend that you migrate the Analysis Services repository from the default Microsoft Access database to an SQL Server database. SQL Server is more reliable than Access, and it can be easily added to the backups you perform regularly for other SQL Server databases.

You use the Migrate Repository Wizard to migrate the repository to an SQL Server database on the same or another server. Later, you can use the wizard to migrate the repository to another SQL Server database.

**Warning:** After you migrate the repository to an SQL Server database, you cannot migrate the repository back to a Microsoft Access database.

#### **Create a new database to which to migrate the repository**

1. Start the SQL Server Enterprise Manager.
2. In the left pane, expand **Microsoft SQL Server**, then **SQL Server Group**, then the name of the SQL Server.
3. Right-click **Databases**, and select **New Database**. The **Database Properties** dialog box opens.
4. Type the **Name**.
5. Leave the defaults as they are.

#### **Create a new SQL Server login**

1. In the left pane, under the name of the SQL server, expand **Security**.
2. Right-click **Logins**, and select **New Login**. The **SQL Server Login Properties - New Login** dialog box opens.
3. On the **General** tab, type a **Name**.
4. In the **Authentication** section, select **SQL Server Authentication**.
5. Type a **Password**.
6. In the **Defaults** section, select the **Database** you created in “Create a new database to which to migrate the repository.”
7. On the **Server Roles** tab, in the **Server Role** list, select **System Administrators** and **Bulk Insert Administrators**.
8. On the **Database Access** tab, in the **Permit** column, select the database you created in “Create a new database to which to migrate the repository.” A checkmark appears to the left of the entry.
9. In the **Permit in Database Role** list, select **public** and **db\_owner**.

## Migrate the repository

1. Start the Analysis Manager.
2. In the left pane, expand **Analysis Servers**.
3. Select the server whose repository you want to migrate. This causes Analysis Manager to connect to the server.
4. Right-click the server and select **Migrate Repository**. The Migrate Repository Wizard opens.
5. Follow the steps in the wizard, supplying the following information:

<b>For this information...</b>	<b>Do this...</b>
Destination format	Select <b>Analysis server native format</b> .
SQL Server computer to use for the repository	Type the name of the SQL server. (The drop-down list does not include the server.)
How to connect to the SQL Server computer	Select <b>SQL Server Authentication</b> .
<b>Login ID and Password</b>	Type those you created in "Create a new SQL Server login."
SQL Server database to use for the repository	Select the <b>Database</b> you created in "Create a new database to which to migrate the repository."

## Beginning the Installation Process

To start the installation process, complete the following steps:

1. Close all non-essential applications.
2. On the computer that will be the SAS Activity-Based Management Server, log in as an administrator.

### *Install the SAS System*

Follow the Installation Instructions for SAS 8.2 enclosed in your package to install the SAS System. You will also need to install the SAS Hot Fix SN-006001. To install this Hot Fix, go to <http://support.sas.com/techsup/unotes/SN/006/006001.html> and follow the instructions there.

### *Install SAS Activity-Based Management Server*

In order to build the databases during the installation, you will be asked for a user name and password for a user who has SQL Server administrator privileges. Depending on your organization's database policies, you may need to enter this information.

1. You will be asked to enter SAS Activity-Based Management Server licenses, so have all your licenses and authorization codes available.
2. Insert the CD-ROM into the drive.

The installation media is AutoPlay-enabled. If your computer has the AutoPlay function enabled, the installation process begins automatically when you insert the CDROM into the drive. If your computer has the AutoPlay function disabled, browse the CD-ROM, and double-click the file `start.exe`, which is at the root of the CD-ROM.

3. Click **Install SAS Activity-Based Management**.
4. Follow the instructions on the screen.

5. If you are asked to select the Web site on which to install, do not select the administrator's Web site.
6. When you are asked if you would like to install the SAS Activity-Based Management Server databases, do one of the following:
  - Enter an SQL Server administrator **User Name** and **Password**.
  - Select **Use current login for authentication**.
7. If you are asked if you want to reboot now, click **Yes**.

### ***Set up licenses, roles, and users in SAS Activity-Based Management Administrator***

To start SAS Activity-Based Management Administrator, select **Start**→**Programs**→**SAS**→**SAS Activity-Based Management 6.1**→ **SAS Activity-Based Management Administrator**.

If you cannot log in to SAS Activity-Based Management Administrator, you have not been assigned as an SAS Activity-Based Management administrator. The installation program automatically set the person who installed SAS Activity-Based Management as an administrator. Ask that person to make the changes or to set you as an administrator.

For instructions on how to set up licenses, roles, and users, refer to the online help for SAS Activity-Based Management Administrator.

## **Upgrade from a Previous Version**

The upgrade steps for SAS Activity-Based Management are explained in the sections that follow. Before upgrading, please read all the information in this section.

**Note:** All SAS Activity-Based Management client computers must also be upgraded. Additionally, any remote installations of the SAS Activity-Based Management Administrator must be updated.

### ***Using Crystal Reports with SAS Activity-Based Management 6.1***

SAS Activity-Based Management 6.1 can use your existing installation of Crystal Reports. Contact Tech Support for instructions **before** uninstalling the previous version if you are interested in this option.

### ***Backup SQL Server databases***

SAS recommends you back up the SAS Activity-Based Management SQL Server databases whenever you upgrade. The SQL Server databases you need to back up are OEAdmin and OEModels. You do not need to back up ASPState, which stores the state of user Web pages.

**Warning:** Backups are version-specific. Do not restore the current SAS Activity-Based Management databases from a backup created from a previous version. For more information, contact SAS Technical Support.

Before backing up the databases, verify that no one is using SAS Activity-Based Management on the server that you are upgrading.

**Tip:** Because back-ups are version-specific, include the version number in the back-up name.

### ***Uninstall the previous version of SAS Activity-Based Management Server***

1. On the Server, use **Add/Remove Programs** in the **Control Panel** to remove **SAS Activity-Based Management Administrator**.
2. On the server, use **Add/Remove Programs** in the **Control Panel** to remove **SAS Activity-Based Management Server**.
3. When you are asked if you want to delete the SAS Activity-Based Management databases:
  - If you are upgrading models or scorecards that exist, click **Don't Delete**. This saves the databases so that they can be upgraded later.
  - If your users want to remove the current databases and use the latest version of SAS Activity-Based Management with new databases, click **OK**.
4. If you are asked if you want to reboot now, click **Yes**.

### ***Install the latest version of SAS Activity-Based Management Server***

During the installation, to build or upgrade the databases you will be asked for a user name and password for a user who has SQL Server administrator privileges. Depending on your organization's database policies, you may need to enter it.

After completing the installation, you might be asked to reboot the server.

1. You will be asked to enter SAS Activity-Based Management licenses for the upgrade version, so have all your licenses and authorization codes available.
2. Insert the CD-ROM into the drive.

The installation media is AutoPlay-enabled. If your computer has the AutoPlay function enabled, the installation process begins automatically when you insert the CD-ROM into the drive. If your computer has the AutoPlay function disabled, browse the CD-ROM, and double-click the file **start.exe**, which is at the root of the CD-ROM.

3. Click **Install SAS Activity-Based Management**.
4. Follow the instructions on the screen.
5. When you are asked to select the Web site on which to install, do not select the administrator's Web site.
6. When asked if you would like to install the SAS Activity-Based Management databases, do one of the following:
  - Enter an SQL Server **User Name** and **Password**.
  - Select **Use current login for authentication**.
7. If you are *upgrading* models or scorecards from a previous version of SAS Activity-Based Management, click **Upgrade**.
8. If your users want to remove the current databases and use the latest version of SAS Activity-Based Management with *new* databases, click **Reinstall**. New databases are created and previously created data will no longer be available.
9. If asked if you want to reboot now, click **Yes**.

## After Installation or Upgrade

### *IIS Settings*

Do not change IIS settings for the OEServer and OEWebServices virtual folders. If you change these settings, SAS Activity-Based Management will not operate properly.

### *Notify users of the URL from which to install SAS Activity-Based Management*

**Note:** Ensure that you notify users that previously installed versions of Oros Analyzer (the predecessor to SAS Activity-Based Management) must be upgraded.

1. For users who will be installing over a LAN, the URL is

`http://<SAS Activity-Based Management Server name>/OEServer/`

where <SAS Activity-Based Management Server name> is the name of the server on which SAS Activity-Based Management Server is installed.

Example: `http://polaris/OEServer/`

**Note:** Users might need to enter a user name, password, and domain.

2. For users who will be installing over the Internet, the URL is

`http://<SAS Activity-Based Management Web site>/OEServer/`

where <SAS Activity-Based Management Web site> is a fully qualified domain name.

Example: `http://polaris.mycompany.com/OEServer`

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