

Scheduling in SAS® 9.2



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Chapter 1

SAS Scheduling Overview

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About SAS Scheduling

The SAS scheduling tools enable you to automate the scheduling and execution of SAS jobs across your enterprise computing environment. Scheduling requires four main components:

SAS application

SAS applications create the jobs to be scheduled. These applications include SAS Data Integration Studio, SAS Web Report Studio, and SAS Marketing Automation. In addition, you can schedule SAS programs that are not produced by a SAS application.

Schedule Manager

This plug-in for SAS Management Console sets or enables you to edit the schedule and conditions for execution of the job, and specifies the scheduling server. Some applications (such as SAS Web Report Studio and SAS Marketing Automation) bypass the Schedule Manager to create jobs, but you can still use Schedule Manager to edit these jobs.

Scheduling server

This server determines when a job's schedule (as specified in the Schedule Manager) has been met and runs the scheduled job. The scheduling server also determines when other events specified by the Schedule Manager have occurred. The scheduling process can use any of these scheduling server types:

- Process Manager server (part of the Platform Suite for SAS)
- a server that uses the scheduling functions provided by the operating system
- an in-process scheduler, which runs as a process inside a SAS application

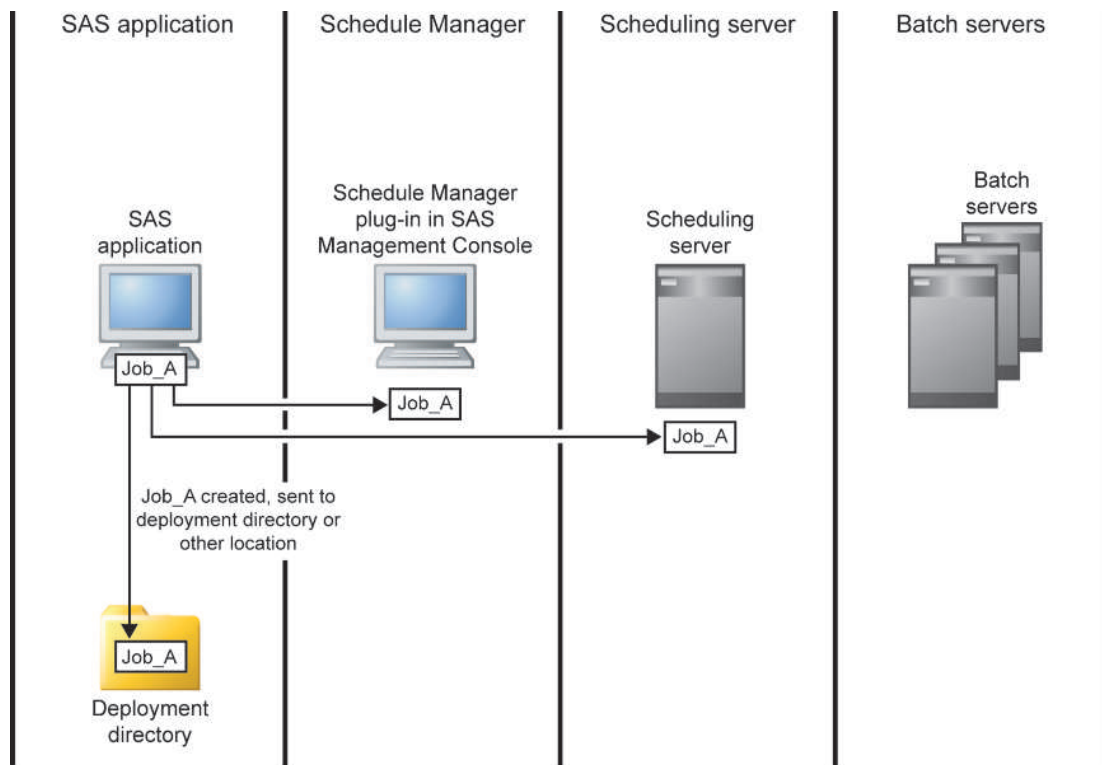
Batch server

This server provides the application-specific command that is needed to run the scheduled job. The command is run by the scheduling server when the specified scheduling conditions are met. Several types of batch servers are supported (Java batch server, SAS DATA step batch server, and generic batch server), each of which runs jobs from a specific SAS application or solution.

Overview of the Scheduling Process

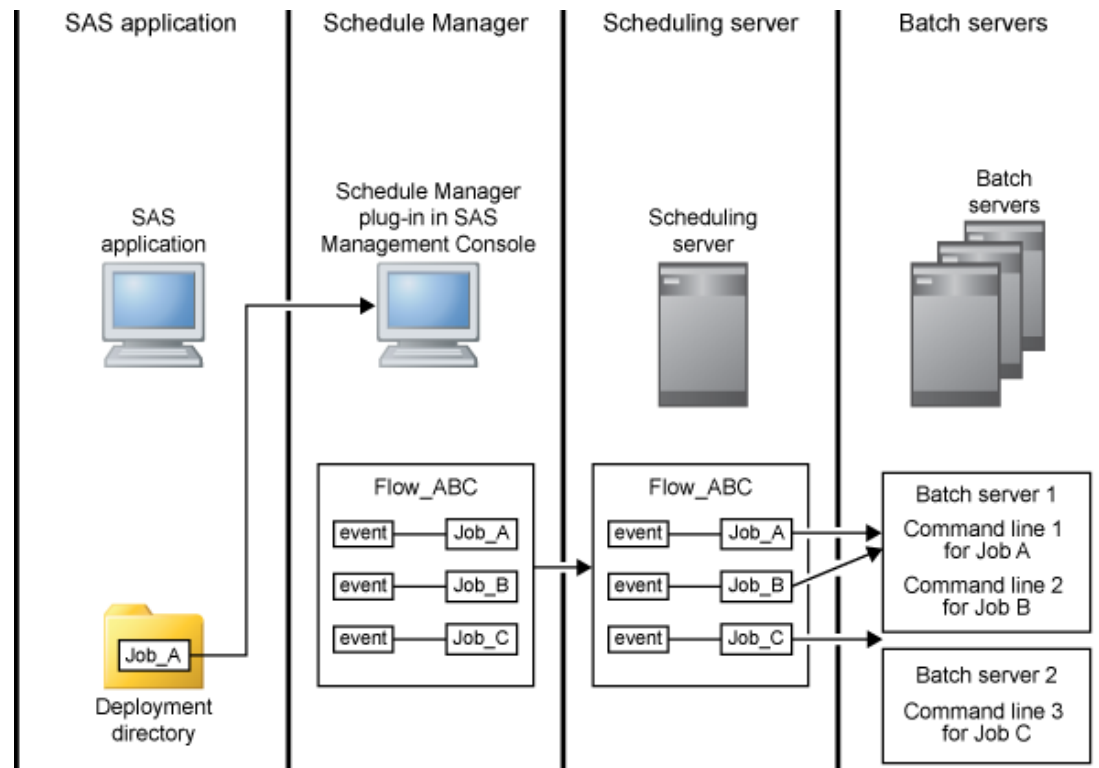
The following example provides an overview of the scheduling process and how the components work together to generate, schedule, and run a job.

1. A SAS application (such as SAS Data Integration Studio) creates a job that needs to be scheduled. If the job was created by SAS Data Integration Studio, the job is placed in a deployment directory. If the job was created by SAS Marketing Automation, the job is sent either to the Schedule Manager or directly to the scheduling server (depending on the user's permissions). SAS programs and jobs from other applications are also sent directly to the Schedule Manager.

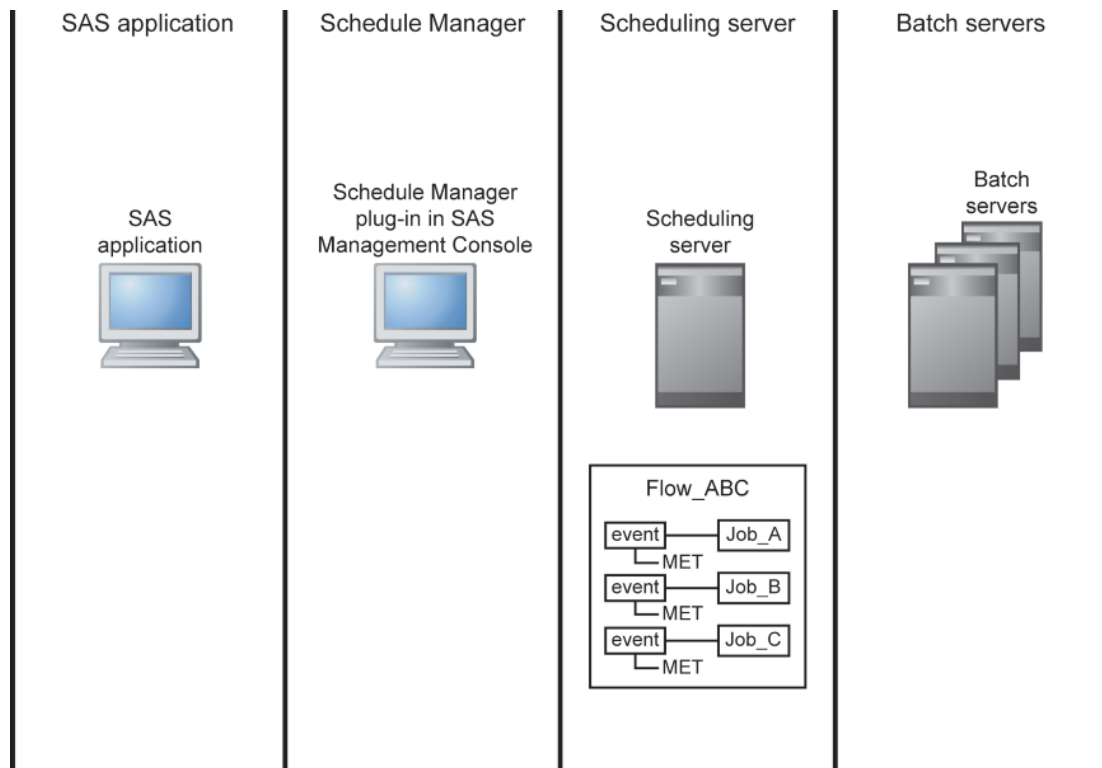


2. A user set up to administer scheduling can use the Schedule Manager plug-in in SAS Management Console to prepare the job for scheduling, or users can schedule jobs directly from other SAS applications. The job is added to a flow, which can include other jobs and events that must be met (such as the passage of a specific amount of time or the creation of a specified file). The Schedule Manager also specifies which scheduling server should be used to evaluate the conditions in the flow and which batch

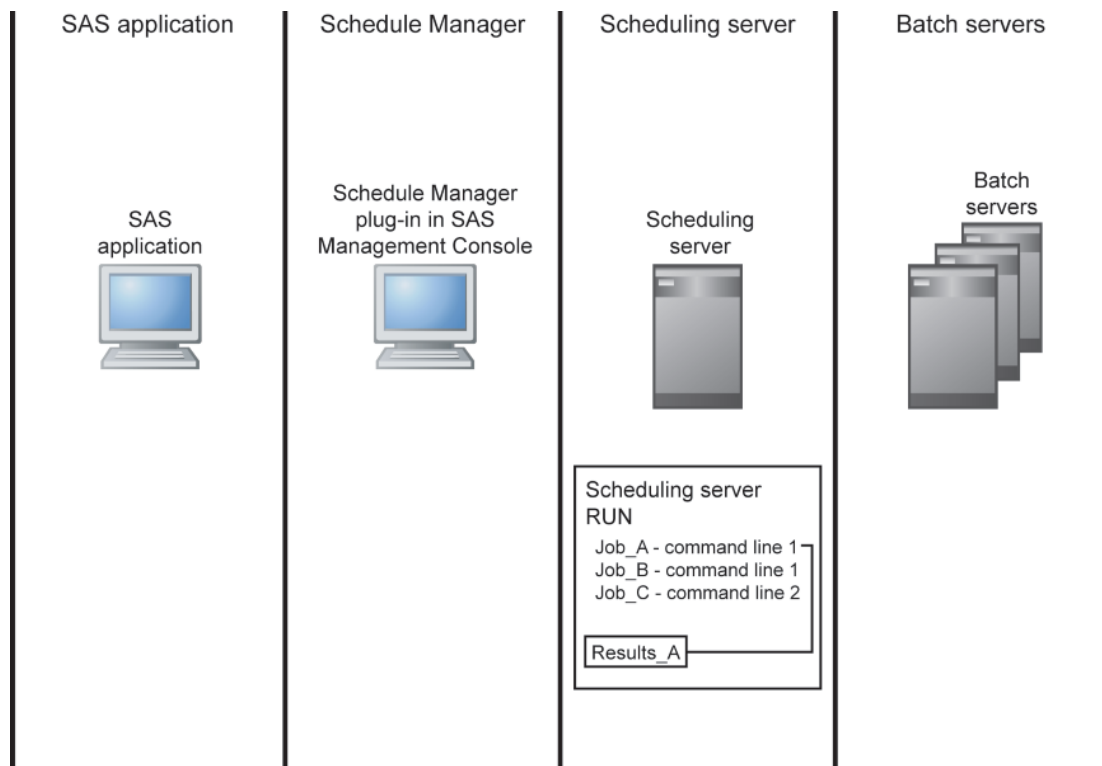
server should provide the command to run each job. The type of events you can define depends on the type of scheduling server you choose. When the Schedule Manager has defined all the conditions for the flow, the flow is sent to the scheduling server, which retrieves the command that is needed to run each job from the designated batch server.



3. The scheduling server evaluates the conditions that are specified in the flow to determine when to run a job. When the events specified in the flow for a job are met, the scheduling server uses the command obtained from the appropriate batch server to run the job. If you have set up a recurring scheduled flow, the flow remains on the scheduling server and the events continue to be evaluated.



4. The scheduling server uses the specified command to run the job in the batch server, and then the results are sent back to the scheduling server.



About Scheduling Servers

Types of Scheduling Servers

SAS supports scheduling through three different types of scheduling servers:

- Platform Process Manager server
- Operating system scheduling server
- In-Process scheduling server

The type you choose depends on the level of scheduling functions your organization requires, the budget and resources available to support a scheduling server, and the applications that will be creating jobs to be scheduled. When you create a flow in SAS Management Console's Schedule Manager, you specify which scheduling server the flow is to be associated with. Schedule Manager then passes the flow information to the appropriate scheduling server.

You can create a definition for a scheduling server by using the Server Manager plug-in in SAS Management Console or an application that directly schedules jobs.

The following topics contain an overview of each of the types of scheduling servers.

Platform Process Manager Server

The Platform Process Manager server, which is part of Platform Suite for SAS, provides full-featured enterprise scheduling capabilities, including features such as workload prioritization and policy-based scheduling. The server enables you to schedule jobs using a variety of recurrence criteria and dependencies on other jobs, time events, or file events. You can use the Flow Manager application (also part of Platform Suite for SAS) to manage scheduled jobs, including deleting and stopping previously scheduled jobs.

Because Platform Suite for SAS is a separate application, it requires an additional license fee. It also requires you to perform additional tasks to install, configure, and maintain all components of the application. However, the components included with the application also provide functions such as load balancing and submission of jobs to a grid.

The metadata for a Process Manager Server includes the following information:

- the network address or host name of a machine
- the port number for the server

Operating System Scheduling Server

Operating system scheduling provides the ability to schedule jobs through the services provided through a server's operating system. Using operating system scheduling provides a basic level of scheduling at no additional cost, because the service is provided by software you already own. However, this type of scheduling does not support advanced scheduling capabilities, such as the use of many types of dependencies. The specific scheduling functions that are supported vary according to the operating system used, which can make it more difficult to set up consistent scheduling criteria on several servers. Managing scheduled jobs requires you to issue operating system commands, rather than using a graphical user interface.

The metadata for an operating system scheduling server includes the following:

- the network address of a machine
- the port number for the server
- the directory on the server where scheduled flows should be stored (control directory)
- the command to start a SAS session on the server

In-Process Scheduling Server

In-process scheduling provides the ability to schedule jobs from certain Web-based SAS applications without using a separate scheduling server. With in-process scheduling, the scheduling functions run as a process within the application. Although in-process scheduling is supported only for certain applications (such as SAS Web Report Studio), it offers basic scheduling capabilities without incurring any additional cost or requiring many installation or configuration tasks. Because an in-process scheduling server runs as part of the application, this type of scheduling also eliminates the need for the application to authenticate scheduled jobs to a separate server. However, the application must be running at the time the scheduled job attempts to run.

About Schedule Manager in SAS Management Console

The Schedule Manager plug-in for SAS Management Console is a user interface that enables you to create flows, which consist of one or more SAS jobs. A SAS job is any single command used to perform a batch task. Each job within a flow can be triggered to run based on criteria such as a date and time, the state of a file on the file system, or the status of another job within the flow. The available scheduling criteria depend on the type of scheduling server used.

The flows can include jobs that were created in SAS Data Integration Studio, SAS Marketing Automation, and SAS Web Report Studio. You can also use Schedule Manager to deploy and schedule SAS jobs that are independent of a specific SAS application.

Schedule Manager is designed as a scheduler-neutral interface. When you create a flow, you specify which scheduling server that the flow is to be associated with. Schedule Manager converts the flow information to the appropriate format and submits it to the scheduling server (the Platform Computing server, an operating system scheduling server, or an in-process scheduling server).

About Batch Servers

Batch servers provide the command needed to run the programs that have been submitted for scheduling. Several batch server types are supported, each of which provides the command to run a scheduled SAS job from a specific application in a specific environment. This command is included in the metadata definition for each server. The batch server's commands are independent of the type of scheduling server used.

Batch server metadata objects are components of the SAS Application Server (for example, SASApp), and can be created by using the Server Manager plug-in in SAS Management Console. Each batch server object includes the following attributes:

- the network address of the associated machine

Note: This address is for documentation purposes only. The batch job executes on the machine that is specified in the scheduling server's metadata.

- a command that runs in batch mode on the machine that is specified in the scheduling server's metadata

The following types of batch servers are supported:

SAS Java Batch server

is used for scheduling Java applications that are supplied by SAS and that are invoked and launched by the standard `java.exe` shell. This server definition is used for reports that are created by applications such as SAS Web Report Studio and campaigns created by SAS Marketing Automation. The subtype of the server specifies which Java application is invoked (for example, the **report** subtype runs **outputgen**, and the **marketing automation** subtype runs **malauncher**). Each SAS Java Batch server instance provides the command for a single application, so if you need to schedule jobs from multiple applications, you must configure a SAS Java Batch server for each application (for example, one server for SAS Web Report Studio and one for SAS Marketing Automation).

SAS DATA Step Batch server

is used for scheduling SAS programs that contain DATA step and procedure statements. These programs include jobs that are created in and deployed from SAS Data Integration Studio.

The metadata definition for a SAS DATA Step Batch Server must include a SAS start command that will run in batch mode.

SAS Generic Batch server

is used for scheduling jobs from Java-based SAS applications that are not specifically supported by the SAS Java Batch server types. If a SAS application adds support for scheduling jobs before a new type of SAS Java Batch server has been created, you can use the SAS generic batch server to provide a command to run jobs from the application.

About Scheduling Metadata

Overview of Scheduling Metadata

The SAS Metadata Server provides central storage and management of metadata about scheduling resources. Before you can use SAS scheduling, metadata must exist for the following resources:

- a scheduling server
- a batch server
- one or more deployment directories (required only for SAS DATA Step batch servers)
- one or more jobs that have been deployed for scheduling

Scheduling servers and batch servers have been discussed in previous topics. Metadata definitions for deployment directories, jobs, and flows are described in the following topics.

About Deployment Directory Definitions

A deployment directory is a location on the file system of your SAS application server that contains a batch server. When a SAS Data Integration Studio user deploys a job for

scheduling, a DATA step job is generated and placed in this directory. When the job is executed, the job information is read from this directory. The directory is also used when deploying SAS DATA step programs for scheduling from the Schedule Manager.

In order for SAS Data Integration Studio users to deploy jobs, a metadata definition for the deployment directory must exist in the metadata repository. The metadata definition includes the following information:

- the name of the SAS Application Server with which the directory is associated
- a name for the directory
- the path to the directory (either fully qualified or a relative path from the application server)

About Job and Flow Metadata

Job metadata becomes available to the Schedule Manager when you use a SAS application such as SAS Data Integration Studio, SAS Web Report Studio, or the Schedule Manager plug-in in SAS Management Console) to schedule a job. The job metadata includes the following information:

- the command that is to be used to execute the job
- the name of the SAS batch server that is associated with the job
- the deployment directory that is associated with the job (required only for SAS DATA Step Batch servers)
- the filename of the executable program (required only for SAS DATA Step batch servers)

Flow metadata is created when you use Schedule Manager to create a flow and when you use SAS Web Report Studio to schedule a report. The flow metadata includes the following information:

- the name of the scheduling server that is to execute the jobs in the flow
- the triggers and dependencies that are associated with the jobs in the flow

Depending on the scheduling server that the user specifies, Schedule Manager converts the flow metadata to the appropriate format and submits it to the scheduling server. Flows that are created by SAS Web Report Studio are automatically directed to the Process Manager Server or the in-process scheduling server.

Chapter 2

Setting Up Scheduling Using Platform Suite for SAS

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About Platform Suite for SAS

Platform Suite for SAS is an integrated enterprise job scheduler from Platform Computing Corporation. Platform Suite for SAS is specifically designed to manage job flows that are generated by SAS software, and includes the following components:

Process Manager Server

controls the submission of jobs to Platform Load Sharing Facility (LSF) and manages all dependencies among jobs.

Platform Flow Manager

provides a visual representation of flows that have been created for a Process Manager Server. These include flows that were created and scheduled in the SAS Management Console Schedule Manager, as well as reports that have been scheduled through SAS Web Report Studio.

Platform Flow Manager provides information about each flow's status and associated dependencies. You can view or update the status of jobs within a flow, and you can run or rerun a single job regardless of whether the job failed or completed successfully.

Platform Calendar Editor

is a scheduling client for a Process Manager Server. This client enables you to create new calendar entries. You can use it to create custom versions of calendars that are used to create time dependencies for jobs that are scheduled to run on the server.

Platform Load Sharing Facility (LSF)

handles the load balancing and execution of batch commands (which represent jobs). Platform LSF manages and accelerates batch workload processing for computer- and data-intensive applications. Process Manager Servers use Platform LSF for the execution of the jobs within a flow. You must install Platform LSF on all SAS batch servers as well as all other servers that will execute scheduled SAS jobs.

Platform Grid Management Services

manages jobs that are scheduled in a grid environment. This software collects information on the jobs that are running on the grid and the nodes to which work has been distributed. It makes the information available to the Grid Manager plug-in for SAS Management Console. You can use Grid Manager to view and manage the grid workload information.

Summary of Platform Suite for SAS Installation and Configuration Tasks

To use the scheduling capabilities of Platform Suite for SAS, complete the following installation and configuration tasks:

1. Determine where to install Platform Suite for SAS.
2. Create the necessary users, groups, and logins.
3. Install Platform Suite for SAS.
4. Define the Process Manager Server (if it has not already been set up by the Configuration Wizard).
5. Define a deployment directory (if you are deploying jobs from SAS Data Integration Studio or the Schedule Manager plug-in for SAS Management Console)

Determining Where to Install Platform Suite for SAS

The first consideration when configuring scheduling using Platform Suite for SAS is where to install the software. The location that you choose affects the availability of scheduling functions as well as the ability to schedule jobs.

For scheduling on a single machine, install Platform Suite for SAS on a single machine in your network.

If you install a Platform LSF on more than one machine in your network, you must use SAS Grid Manager to configure scheduling. Refer to *Grid Computing in SAS* for more information on configuring scheduling in a grid environment.

If you are using a multi-tier configuration with SAS Data Integration Studio (consisting of a client tier, a middle tier running a Web application server, and a server tier) and you want to schedule jobs from SAS Data Integration Studio as well as reports from SAS Web Report Studio, you must install the Platform Process Manager server and SAS Business Intelligence Report Services on the server tier.

If you are scheduling reports using SAS Web Report Studio, you must install the Platform Process Manager on the same system as SAS Business Intelligence Report Services. By default, SAS Business Intelligence Report Services is installed on the server tier. If you want to install it on a different machine, you must use a custom installation plan. If you use both SAS Web Report Studio and SAS Data Integration Studio, Platform Process Manager and SAS Business Report Services must always be installed on the SAS Application Server tier, which contains a SAS Workspace Server and an object spawner.

Defining Users

In order to schedule jobs using Platform Suite for SAS, users must be defined (in the operating system of the server) and configured. The following table lists these users.

Table 2.1 *User Definition Summary*

User ID	Description	Locations	Permissions
any user ID that is an LSF administrator	Primary administrator for the Platform scheduling server; owns the Process Manager server	Created in operating system; must be part of Administrators Group	Must have full control of LSF and Process manager directories; on Windows, must also have Act as part of operating system and Log on as a batch job user rights
any user ID that is an LSF user	User who has permission to schedule jobs using the Schedule Manager plug-in	Created in operating system; not required to be defined in metadata, but can be defined in metadata to avoid prompting for credentials; part of SAS Server Users Group	
lsfuser	Default user ID used by SAS Web Report Studio to schedule reports	Created in operating system; added in metadata as the login for the LSF Services group to support centralized password management	

Installation Considerations

Install Platform Suite for SAS on the scheduling server, using the installation documentation available in the `readme.pdf` file located in the Third Party area of your SAS Software Depot or from <http://support.sas.com/rnd/scalability/platform>. The following software will be installed:

- Platform Process Manager Server
- Platform Process Manager clients (Flow Manager and Calendar Editor)
- Platform LSF

Process Manager Server and Platform LSF must both be installed on the same machine. Platform LSF can also be installed on additional machines to support grid configurations. The Process Manager clients can be installed on any machine or machines.

When the Platform Process Manager Setup Wizard prompts for the owner of the Process Manager Server, specify the LSF administrative user. For Windows installations, be sure to specify the user's domain or, for local accounts, a dot (.) with the user ID.

When the installation process is complete, check to make sure that the following services are running on the server, with the LSF administrative user as owner:

- LSF *cluster name* LIM
- LSF *cluster name* RES
- LSF *cluster name* SBD
- Process Manager

Note: For report scheduling to work, Platform LSF must be installed on the same machine as SAS Business Intelligence Report Services.

Migration Considerations

If you install a version of Platform Suite for SAS on a different server than the previous version was installed on, you must manually copy the Process Manager calendar metadata to the new location. To copy the calendar metadata, install Platform Suite for SAS in the new location and then follow these steps:

1. Log onto the old Process Manager server.
2. Change to the `JS_TOP/work/calendar` directory. `JS_TOP` corresponds to the Platform Process Manager installation directory.
3. Copy all files except those ending in “`sys`” from this directory to the `JS_TOP/work/calendar` directory on the new server.

Resolving Issues Related to Scheduling with Platform Suite for SAS

Check Error Messages in Platform Flow Manager

Platform Flow Manager enables you to view status and other information about the jobs that have been scheduled on Platform scheduling servers. To view error messages in Platform Flow Manager, follow these steps:

1. Open Platform Flow Manager on the scheduling server. On Windows systems, click **Start ⇒ All Programs ⇒ Platform Process Manager ⇒ Flow Manager**.
2. Log on as the scheduling user. You might need to include a domain name or machine name with the user ID.
3. On the left pane of Flow Manager, expand the folder for the scheduling user. If you selected **Run Now** when you scheduled the report, the job will be in a folder called **adhoc**. In the folder, look for the most recently scheduled flow. If the job failed, its name might include **(Exit)**.
4. Double-click on the flow name (for example, **1 (Done)**). An icon for each job in the flow will appear in the right pane. A red icon indicates that errors occurred, and a blue icon indicates that the job was successful.
5. Right-click the icon in the right pane, and select **View History**.

Note: You can also examine the contents of logs in the LSF directory.

Resolving Windows-specific Issues Related to Scheduling with Platform Suite for SAS

To properly install Platform Suite for SAS on Windows systems, you must supply a valid user ID and password to run and administer the services. The user ID that is used to run the installation program must have **Act as part of the operating system** privileges. The user ID that you specify to run the services must have **Log on as a batch job** privileges. Issues can occur if this user does not have the required privileges, if the user's password has expired, or if the wrong domain name is provided.

One simple way to test the domain, user, and password is to do the following:

1. Bring up a DOS command prompt or select **Start ⇒ Run**.
2. Enter the **runas** command using the following syntax to bring up a new DOS prompt running under the other user ID:


```
>runas /user:DOMAIN\userid cmd
```
3. Enter the password. If the user ID authenticates successfully, a new DOS command prompt appears.

From the new DOS command prompt, you can run the various scheduled commands that are failing. If the commands succeed when they are entered at the prompt, this indicates that there are some issues with the scheduling setup. If the commands fail, then additional information might appear in the DOS command window to help you determine the problem.

In a multi-user environment, in which more than one user is submitting and running flows, the appropriate permission settings must be in place on certain folders. The Platform scheduling server folders should already have the correct permissions set for the scheduler service and administrator accounts and should need no further changes. Make sure that the following files installed by LSF have the following permissions (LSF_TOP corresponds to the LSF installation directory, such as `C:\lsf_7.0`):

Table 2.2 Permissions for Files Installed by LSF

Folder	User Group	Permissions
LSF_TOP\work	LSF service accounts	Full control (All)(All)
LSF_TOP\work	LSF administrators	Full control (All)(All)
LSF_TOP\work	Everyone	Special access (R)(R)
LSF_TOP\logs	LSF service accounts	Full control (All)(All)
LSF_TOP\logs	LSF administrators	Full control (All)(All)
LSF_TOP\logs	Everyone	Special access (R)(R)
LSF_TOP\conf\lsfuser.passwd	Job scheduler service accounts	Special access (R)(R)

Make sure that the files installed by Platform scheduling servers have the following permissions (JS_TOP corresponds to the Platform Process Manager installation directory):

Table 2.3 Permissions for Files Installed by the Platform Scheduling Server

Folder	User Group	Permissions
JS_TOP\work	LSF service accounts	Full control (All)(All)
JS_TOP\work	JS administrators	Full control (All)(All)
JS_TOP\work	Everyone	Special access (R)(R)
JS_TOP\log	JS service accounts	Full control (All)(All)
JS_TOP\log	JS administrators	Full control (All)(All)
JS_TOP\log	Everyone	Special access (R)(R)

Resolving AIX Issues Related to Scheduling with Platform Suite for SAS

The AIX environment is unique in that you can configure your kernel to be in either 32-bit mode or 64-bit mode. Your 64-bit applications will run with either configuration.

Platform Suite for SAS requires that the kernel be in 64-bit mode for its 64-bit applications. Therefore, your kernel must be configured in 64-bit mode to use Platform scheduling servers and Platform LSF. To determine whether your kernel is in 64-bit mode, use the **lsconf** command. Here is an example of the command output that appears if your kernel is in 32-bit mode:

```
$ lsconf -k
Kernel Type: 32-bit
```

To switch between the 32-bit and 64-bit kernels, an administrator must follow these steps:

1. Modify the **/usr/lib/boot/unix** directory and the **/unix** directory to be a symbolic link to the library for the desired kernel.
2. Run the **bosboot** command to write a new system boot image.
3. Reboot the system.

Resolving SAS Exit Behavior When Using Platform Suite for SAS and SAS Data Integration Studio

During the installation process, the SAS Deployment Wizard creates a script called **sasbatch** in the following path:

SAS-config-dir\Levl\SASApp\BatchServer

As a default, jobs that are deployed from SAS Data Integration Studio are run using this script.

If you are not using this script, then the Platform scheduling server will report your SAS jobs as completing with a status of **Exit** instead of **Done**. This situation occurs because Platform scheduling servers treat any nonzero exit code as **Exit** instead of **Done**.

To resolve this issue, you can use the **sasbatch** script that was created by the SAS Deployment Wizard. If you are using a different script, you can modify the script to prevent the error in the following ways.

To use a job starter on Windows installations, modify your script as follows:

```
$APPSERVER_DIR$=D:\SAS\config\Levl\SASMain
cd /D
D:\SAS\config\Levl\SASMain
if not {%username%}=={} ( call sas.bat %*%
set rc=%ERRORLEVEL%
if %rc%==1 goto makenormalexit )
else ( call sas.bat -sasuser work %*%
set rc=%ERRORLEVEL%
if %rc
%==1 goto makenormalexit )
exit %rc
% :makenormalexit
exit 0
```

To use a job starter on UNIX installations, modify your script as follows:

```
eval $cmd
rc=$?
if [ $rc -eq 1 ]; then
    exit 0
else
```

```

        exit $rc
    fi

```

Using Platform Suite for SAS with z/OS

Overview

Platform Process Manager works with IBM z/OS systems through file transfer protocol (FTP) technology. Platform Process Manager uses FTP to submit a proxy job to the z/OS system. You can then use FTP to monitor the progress of the job. To set up scheduling with a z/OS system, you must verify that the JCL that is submitted with each job is correct for your system.

You cannot suspend or resume jobs that run on z/OS systems.

Configuring Scheduling on z/OS with Platform Suite for SAS

To configure your environment for using Platform Suite for SAS with a z/OS system, follow these steps:

1. If your z/OS configuration uses a configuration other than the default, you must modify the template file.
2. Copy the **zos_Template.xml** file from the JS_TOP/7/examples directory to the JS_TOP/work/templates directory. JS_TOP corresponds to the Platform Process Manager installation directory.
3. Make any modifications to **zos_Template.xml** to match your system configuration.
4. Edit the **zos.conf** file, which is located in the JS_TOP/conf directory. This file contains configuration settings for your FTP environment.
5. Define a SAS DATA Step Batch Server, specifying z/OS as the subtype.

Canceling Scheduled Jobs in z/OS Systems under Windows

If Platform Suite for SAS is installed on a Windows system, you must use a queue, rather than Flow Manager, to cancel a scheduled job on a z/OS system. An administrator creates a queue that contains the job to be canceled and submits the queue to the z/OS system using FTP. The queue must contain a TERMINATE job control and the path to the script that cancels the job. An example queue is as follows:

```

Begin Queue
QUEUE_NAME=zos_jobs
DESCRIPTION=Cancel zos jobs
JOB_CONTROL=TERMINATE[C:\pm\7\etc\zos -k]
End Queue

```

Further Resources

For additional information about managing job submissions, see the white paper *SAS Scheduling: Getting the Most Out of Your Time and Resources* at .

Chapter 3

Setting Up Scheduling Using Operating System Scheduling

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About Operating System Scheduling

An operating system scheduling server provides a method for scheduling SAS jobs without licensing and installing Platform Suite for SAS. Flows that are sent to the server are run using the scheduling commands that are built into the server's operating system. The process of deploying and scheduling jobs and flows is the same whether you are using an

operating system scheduling server or a Platform Process Manager server. However, there are some limitations in the capabilities of operating system scheduling servers as compared to a Process Manager server. You must use operating system commands instead of the Flow Manager for operations such as stopping or deleting a scheduled flow.

Note: SAS Web Report Studio does not support operating system scheduling.

Capabilities and Limitations of Operating System Scheduling Servers

- You can use Schedule Manager in SAS Management Console to create a list of jobs. However, the jobs will not necessarily execute in the order in which they are listed.
- For specific information about the scheduling capabilities and limitations for each operating system, see the following topics:
 - [“Limitations of Windows Operating System Scheduling Servers”](#) on page 23
 - [“Limitations of UNIX Operating System Scheduling Servers”](#) on page 25
 - [“Limitations of z/OS Operating System Scheduling Servers”](#) on page 25

Summary of Setup Tasks

To enable operating system scheduling, you must have a scheduling server. If you use the SAS Deployment Wizard to install and configure an operating system scheduling environment, all required items are automatically configured. You must include **Operating System Services Scheduling Server 9.2** and **SAS DATA Step Batch Server 9.2** in your plan file and select these two items in the SAS Deployment Wizard.

The setup tasks are as follows:

1. Assign local administration rights to users (Windows only).
2. Assign directory and file permissions.
3. Define an operating system scheduling server.
4. Assign a spawner to the operating system scheduling server.

Step 1: Assign Local Administration Rights to Users (Windows Only)

On Windows systems, the user ID under which the job will be run must have **Local Administration** rights on the scheduling server. To grant these rights, add the user to the Administrators Group.

This task is performed automatically by the SAS Deployment Wizard.

Step 2: Assign Directory and File Permissions

You must assign operating system read and write permissions to the following directories:

Windows:

- `sas-config-dir/Lev1/SchedulingServer`
- `sas-config-dir/Lev1/SchedulingServer/logs`
- `sas-config-dir/Lev1/SchedulingServer/sasuser`

UNIX and z/OS:

- `sas-config-dir\Lev1\SchedulingServer`
- `sas-config-dir\Lev1\SchedulingServer\logs`
- `sas-config-dir\Lev1\SchedulingServer\sasuser`

Note: You can use either forward or backward slashes on Windows systems.

You must also assign execute permission to `sas-config-dir/Lev1/SchedulingServer/SchedulingServer.bat` (Windows) or `sas-config-dir\Lev1\SchedulingServer\SchedulingServer.sh` (UNIX and z/OS).

This task is performed automatically by the SAS Deployment Wizard.

Step 3: Define an Operating System Scheduling Server

Define an operating system scheduling server in the metadata repository, as follows:

1. In SAS Management Console, right-click **Server Manager** and select **New Server**.
2. On the first page of the New Server Wizard, under **Scheduling Servers**, select **Operating System Services**. Click **Next**.
3. On the next wizard page, enter a name (for example, **OS Scheduling Server**).
4. On the next wizard page, enter information in the following fields:

SubType

Select the appropriate operating system.

Control Directory

Enter the path for the directory that will store the script for executing a flow. For a default installation, the directory is `sas-config-dir/Lev1/SchedulingServer`.

Command

Enter the appropriate SAS command, making any changes that are necessary for your installation. Sample commands are as follows:

- Windows:

```
"sas-config-dir\Lev1\SchedulingServer\Schedulingserver.bat"
```

- UNIX:

```
"sasc-config-server/Lev1/SchedulingServer/schedulingserver.sh"
```

- z/OS:

```
sas-config-dir/Lev1/SchedlingServer/SchedulingServer.sh
```

Object Server Parameters

Enter **applelevel=2**.

5. On the next wizard page, select **DefaultAuth** as the Authentication Domain. In the **Host Name** field, enter the name of the machine that hosts the scheduling server. Accept the default port number of **8451**, or enter a different port number if this one is being used. Click **Next**.
6. On the next wizard page, review the settings, and click **Finish**.

This task is performed automatically by the SAS Deployment Wizard.

Step 4: Assign the Operating System Scheduling Server to a Spawner

Associate the operating system scheduling server with a spawner definition, as follows:

1. In SAS Management Console, right-click the spawner that is associated with the same application server on which you defined the scheduling server (for example, **SASApp Spawner**), and select **Properties**.
2. In the Spawner Properties dialog box, select the **Servers** tab.
3. From the **Available Servers** list, select the operating system scheduling server and move it to the **Selected Servers** list.
4. Click **OK**.

This task is performed automatically by the SAS Deployment Wizard.

You can now use Schedule Manager in SAS Management Console to schedule flows. See the following topics:

- [“Using Operating System Scheduling on Windows Systems” on page 22](#)
- [“Using Operating System Scheduling on UNIX Systems” on page 24](#)
- [“Using Operating System Scheduling on z/OS Systems” on page 25](#)

Using Operating System Scheduling on Windows Systems

How Operating System Scheduling Works on Windows Systems

When you schedule a flow using a Windows operating system scheduling server, Schedule Manager creates a script file called *flowname.vbs*.

The script file and the job status information are written to the path *outdir\user-name\flowname*, where *outdir* is the value of the Control Directory attribute in the operating system scheduling server definition.

The path must be a valid Windows path. Valid Windows paths include relative paths, Universal Naming Convention (UNC) paths (for example `\\server\volume\directory`), and mapped paths. If the path is invalid, or if it points to a file instead of a directory, then an error message is written to the SAS log.

Manually Submitting a Flow for Execution on a Windows Operating System Scheduling Server

If you need to manually submit a flow that has been scheduled on a Windows operating system, you can do any of the following:

- Execute the generated script `flowname.vbs`. The file is located in the following path:

`outdir\user-name\flowname`

Either double-click the filename in Windows Explorer, or execute it from a command prompt.

- Use the Windows Task Scheduler to manually schedule the script. To access the Task Scheduler, select **Scheduled Tasks** on the Control Panel. You can also use the **schtasks** command line interface to surface many functions of the Task Scheduler.
- Use the **at** command to manually schedule the script. The capabilities of this command are more limited than those of the Task Scheduler. See your operating system documentation for details.

Manually Canceling a Scheduled Flow on a Windows Operating System Scheduling Server

If you need to manually cancel a flow that has been scheduled on Windows, you can do either of the following:

- Use the Windows Task Scheduler to cancel the job.
- Use the **/del** option of the **at** command. You can use this method only if the job was submitted with the **at** command.

After a scheduled flow has been canceled, you can remove the script that was created for the flow.

Limitations of Windows Operating System Scheduling Servers

Jobs in a flow are run sequentially so that the status of each job can be logged in the status file.

The following limitations apply to Windows operating system scheduling:

- The user ID under which the job will be run must have **Local Administration** rights. To grant these rights, you must add the user to the Administrators Group.
- Windows scheduling executes jobs using the Windows Task Scheduler. As a default, the scheduled tasks execute using the LOCAL SYSTEM user account. Therefore, scheduled jobs have full and open access to the machine.
- The following types of trigger events are not supported on Windows:
 - **Skip interval** is greater than 1 and the interval type is Monthly or Yearly.
 - **Last Day** is selected and the interval type is Monthly or Yearly.

If you specify one of these triggers, then a script is created. However, the script is not submitted for execution, and an error message similar to the following is written to the log:

```
ERROR: One or more flows were not successfully scheduled.
ERROR: triggeroption is currently not supported for
intervaltype events on Windows systems
```

- Always test the command that is contained in a job before you schedule the job.

Using Operating System Scheduling on UNIX Systems

How Operating System Scheduling Works on UNIX Systems

When you schedule a flow using a UNIX operating system scheduling server, Schedule Manager creates the following files:

- a flow command script called *flowname.sh*
- a log for the submitted script, called *flowname.log*

The files are written to the path *outdir/username/flowdefname*, where *outdir* is the value of the Control Directory attribute in the operating system scheduling server definition.

Since the scheduler does not delete either of these files, you must delete them manually when they are no longer needed. Any user that schedules a flow will need read and write permissions to both the *outdir* directory and the log.

Manually Submitting a Flow for Execution on a UNIX Operating System Scheduling Server

If you need to manually submit a flow that has been scheduled on a UNIX operating system scheduling server, follow these steps:

1. Change to the directory where the file *flowname.sh* is located.
2. Type **sh flowname.sh now** at the UNIX shell prompt.

The user that scheduled the flow is also permitted to submit the flow manually.

Manually Canceling a Scheduled Flow on a UNIX Operating System Scheduling Server

If you need to manually cancel a flow that has been scheduled on a UNIX operating system scheduling server, follow these steps:

1. Open the file *flowname.log*, and find the job identifier for the job that you want to cancel. The log will contain a separate job identifier for each date and time that the flow is scheduled. Here is an example:

```
05/04/20 14:57:30 Flow DailyTestFlow starting
commands will be executed
using /bin/ksh
job 1114107300.a at Wed Jun 23 17:02:00 2008
```

2. At the UNIX shell prompt, type **at -l**.

Scheduled jobs will be displayed in the following format:

```
1114107300.a Wed Jun 23 17:02:00 2008
```

3. Enter the following command at the UNIX shell prompt, where *job-id* is the identifier of the job that you want to cancel: **at -r job-id**.

For example, if the job identifier is 1114107300.a, enter **at -r 1114107300.a**.

Limitations of UNIX Operating System Scheduling Servers

On UNIX operating system scheduling servers, SAS 9.2 supports the scheduling of flows that have a single time event as a trigger.

UNIX scheduling uses the **at** command to execute jobs. However this command might not be enabled for use by the scheduling server's user ID. To determine whether the command is enabled, run a test of the **at** command. The following is an example test:

```
echo touch /tmp/attest | at now
sleep 5
ls /tmp/attest
```

Using Operating System Scheduling on z/OS Systems

Limitations of z/OS Operating System Scheduling Servers

On z/OS operating system scheduling servers, SAS 9.2 supports the scheduling of flows that have a single time event as a trigger. The jobs in a flow are submitted to the Job Entry Subsystem (JES) for execution in an asynchronous manner.

How Operating System Scheduling Works on z/OS Systems

When you schedule a flow, Schedule Manager creates the following files:

- a REXX program called **RunFlow_yyyymmddhhmmsssss.rex**, which submits each batch job to run on the requested schedule.
- a file called **jobname.status**, which contains information about the status of the job.
- the following files, each of which invokes the REXX program to log the job status:
 - **logstart_jobname**, which is executed as the first step of each job
 - **logend_jobname**, which is executed as the last step of the job if all previous steps have a return code of 0
 - **logfail_jobname**, which is executed as the last step of the job if any of the previous steps has a return code other than 0
- **flowname.cmd**, which contains the statements that execute the program for the flow. This file is passed to the **at** command to be executed when the time event trigger occurs.
- **flowname.log**, which contains the log information for the flow.
- **flowname.status**, which contains the current status of the flow.

The files are written to a subdirectory called *username/flowdefname* in the Control Directory that was specified in the operating system scheduling server definition, where *username* is the identity that scheduled the flow.

Manually Submitting a Flow for Execution on a z/OS Operating System Scheduling Server

Note: On z/OS, unexpected results can occur if you manually submit a flow without having selected **Manually Schedule** when you scheduled the flow.

If you need to manually submit a flow that has been scheduled on a z/OS operating system scheduling server, follow these steps:

1. Change to the directory where the flow's files are located (*/outdir/username/flowdefname*), where *outdir* is the value of the Control Directory attribute in the operating system scheduling server definition.
2. At the USS prompt, type a command with the following syntax:

```
RunFlow_yyyymmddhhmmsssss.rex <runonce|start>
```

Specify **runonce** if you want to run the flow just once, or specify **start** if you want to resume a recurrence that was specified for the flow.

Canceling a Scheduled Flow on a z/OS Operating System Scheduling Server

If you need to cancel a flow that has been scheduled on a z/OS operating system scheduling server, follow these steps:

1. At the USS prompt, type **at -l**.

Note: Type a lowercase L, not the numeral 1.

A list of jobs appears, as in the following example:

```
1116622800.a  Fri May 20 17:00:00 2005
1116734400.a  Sun May 22 00:00:00 2005
1116820800.a  Mon May 23 00:00:00 2005
1116620801.a  Mon May 23 00:00:00 2005
1117029000.a  Wed May 25 09:50:00 2005
```

2. For each job that you want to cancel, type the following command at the USS prompt:
at -r at-jobid, where *jobid* is the first part of each line of the list of jobs (for example, **at -r 1116622800.a**).

Chapter 4

Setting Up Scheduling Using SAS In-Process Scheduling

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About In-Process Scheduling Servers

If you are scheduling jobs from applications such as SAS Web Report Studio, you can use in-process scheduling. An in-process scheduling server runs as a process inside SAS Web Report Studio, which eliminates the need to send the jobs to an external scheduling server. The in-process server is installed as part of the SAS Web Report Studio installation, which eliminates the need to install, maintain, and license separate scheduling servers. In addition, using an in-process scheduling server simplifies authentication, because scheduled jobs do not have to be authenticated to an external scheduling server. When using in-process scheduling, you schedule jobs from within your application, rather than using the Schedule Manager plug-in.

In-process scheduling servers are supported only in SAS Web Report Studio.

Limitations of In-Process Scheduling

If you are using a release of SAS Web Report Studio prior to version 4.3, in-process scheduling within SAS Web Report Studio works with a single execution instance of SAS Web Report Studio. It cannot be used in a Web cluster. If your environment includes multiple instances of SAS Web Report Studio, you should have only one instance of SAS Web Report Studio running in a cluster in order to use in-process scheduling.

If you are using version 4.3 or later of SAS Web Report Studio, in-process scheduling in a clustered environment is supported by default.

A maximum of five scheduled jobs can be simultaneously running when using in-process scheduling within SAS Web Report Studio. Any additional jobs are automatically placed in a queue and run when one of the running jobs completes. To change the number of

scheduled jobs that can run simultaneously, specify the number in the SAS Web Report Studio property `wrs.scheduling.inProcess.maxSimultaneousJobs`.

Setup Tasks

To set up an in-process scheduling server, install and deploy SAS Web Report Studio. The installation and configuration procedure automatically installs and configures the in-process server. While using the SAS Deployment Wizard, you must specify whether you will use an in-process server or a Platform Computing server to schedule reports.

After you have installed SAS Web Report Studio and the in-process server, you must create a metadata definition for the in-process server.

1. In SAS Management Console, right-click the Server Manager and select **Actions** ⇒ **New Server**.
2. On the first page of the New Server Wizard, under Scheduling Servers, select **SAS In-Process Services**. Click **Next**.
3. In the following pages of the wizard, provide a name and description for the server and then verify the server version.
4. On the final page, review the settings and click **Finish**.

You must define only a single in-process scheduling server. Using multiple servers will cause errors when you attempt to schedule a report.

Configuration Options in a Clustered Environment

If you are using version 4.3 or later of SAS Web Report Studio, support for a clustered environment is provided by default. However, you might want to change configuration options if you have port conflicts or you are using a non-clustered environment. Follow these steps to change the configuration options:

1. In SAS Management Console, expand the **Plug-ins** ⇒ **Configuration Manager** folder. Right-click the Web Report Studio 4.3 folder and select **Properties**. The Web Report Studio 4.3 Properties window opens.
2. Click the **Settings** tab.
3. If you are using a clustered environment and have port conflicts, select different ports in the three **Cluster Scheduling Port** fields.
4. If you are using a non-clustered environment, you can improve performance by changing the value of the **Web Container is Clustered** field to **No**. However, a value of **Yes** is valid for both clustered and non-clustered environments.

Note: If you are using a clustered environment, the value of this field must be set to **Yes**.

5. When you have finished making configuration changes, close the Web Report Studio 4.3 Properties window.

Using In-Process Scheduling

After you have defined the in-process scheduling server in SAS Management Console, SAS Web Report Studio users can start to schedule reports. If users are authorized to schedule reports inside SAS Web Report Studio, they can set up the report schedule and submit the report for scheduling. See *SAS Web Report Studio: User's Guide* for more information on scheduling reports.

Chapter 5

Creating Batch Servers

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Understanding Batch Servers

A batch server is a component of a SAS application server that provides the command necessary for a scheduled job to be executed. When the job is submitted to the scheduling server, a specified batch server is queried to retrieve the command needed to run the job. The scheduling server then issues the command at the appropriate time to run the scheduled job.

Because the commands needed to run a job differ according to the application that was used to create the job, several types and subtypes of batch servers are provided. You must assign each scheduled job to the appropriate batch server as part of the scheduling process.

The following batch server types and subtypes are supported:

SAS Java batch server

supports jobs from a SAS application or solution. When you define a SAS Java batch server, you must specify the subtype to specify the specific application or solution that the server supports.

SAS DATA Step Batch server

supports SAS DATA step jobs that are submitted for scheduling.

SAS generic batch server

supports jobs from SAS applications or solutions that are not listed as supported subtypes by the SAS Java batch server. The SAS generic batch server lets you work with jobs from applications or solutions that add support for scheduling but are not yet supported by the SAS Java batch server.

Defining a SAS Java Batch Server

A SAS Java batch server is a component of a SAS application server definition that provides the command to run a job from a supported list of SAS applications and solutions. Only one logical SAS Java Batch server component is allowed in each SAS application server. If you need to define a batch server for more than one application, you must define each one either in a separate SAS application server or by adding a server to an existing logical Java batch server definition. Depending on your installation, a SAS Java batch server might already be defined by the software deployment wizard when SAS is installed. If you need to set it up manually, follow these steps:

1. In SAS Management Console, expand the **Server Manager** node.
2. Right-click the application server name with which the SAS Java Batch server is associated (for example, **SASApp**), and select **Add Application Server Component**.
3. On the first page of the New SAS Application Server Component Wizard, select **SAS Java Batch Server** and click **Next**.
4. On the next wizard page, enter a name (for example, **SAS Java Batch Server**), and click **Next**.
5. On the next wizard page, do the following:
 - From the **Associated Machine** drop-down list, select the name of the machine that contains the SAS Application Server.
Note: The machine name attribute is for documentation purposes only. SAS scheduling does not use this machine name to set up or execute the job.
 - From the **SubType** list, specify the type of jobs that will be processed by the server. This value corresponds to the SAS solution whose scheduled jobs will be run by the server. The available types are as follows:
 - Marketing Automation
supports jobs from SAS Marketing Automation
 - Reporting
supports jobs created by SAS Web Report Studio using the outputgen command
 - Marketing Optimization
supports jobs from SAS Marketing Optimization
 - OpRisk Monitor
supports jobs from SAS Operational Risk
 - In the **Command line** box, enter the path to the command that runs the scheduled job.
 - Click **Next**.
6. On the next wizard page, review the information you have entered. If it is correct, click **Finish**.

When you finish the wizard, the server appears as a component under the selected SAS application server.

Defining a SAS DATA Step Batch Server

Define the DATA Step Batch Server

A SAS DATA Step Batch server is a component of a SAS application server that provides the command to run a SAS DATA step job or a job from SAS Data Integration Studio. Depending on your installation, a SAS DATA Step Batch server might already be defined by the software deployment wizard when SAS is installed. If you need to set it up manually, follow these steps:

1. In SAS Management Console, expand the **Server Manager** node.
2. Right-click the application server name with which the SAS DATA Step Batch server is associated (for example, **SASApp**), and select **Add Application Server Component**.
3. On the first page of the New SAS Application Server Component Wizard, select **SAS DATA Step Batch Server** and click **Next**.
4. On the next wizard page, enter a name (for example, **SAS DATA Step Batch Server**), and click **Next**.
5. On the next wizard page, do the following:
 - From the **Associated Machine** drop-down list, select the name of the machine that contains the SAS Application Server.

Note: The machine name attribute is for documentation purposes only. SAS scheduling does not use this machine name to set up or execute the job.

 - From the **SubType** list, select the operating system of the associated machine.
 - In the **Command** box, enter the path to the command that starts a SAS session on the scheduling server. Your initial configuration provides a command in the following path: *SAS-config-dir/Lev1/SASApp/BatchServer/sasbatch*.
 - In the **Logs Directory** box, enter the path for the directory where the SAS log is to be stored. Your initial configuration provides a logs directory in the following path: *SAS-config-dir/Lev1/SASApp/BatchServer/logs*.
 - If you want to change the rolling log options, click **Advanced Options**. For a list of the log options, see the information on the LOGPARM= system option in *SAS® 9.2 Language Reference: Dictionary*.
 - Click **Next**.
6. On the next wizard page, review the information you have entered. If it is correct, click **Finish**.

When you finish the wizard, the server appears as a component under the selected SAS application server.

Define a Deployment Directory

In addition to defining the SAS DATA Step Batch server, you must also define a deployment directory, which contains the jobs deployed for scheduling. The deployment directory definition and the corresponding physical directory should have been set up

during your initial installation and configuration. If you need to set them up manually, follow these steps:

1. Create the physical deployment directory in the file system of the scheduling server machine. Assign Write permission to this directory to the users who will be deploying jobs for scheduling.
2. In SAS Management Console, right-click the **Schedule Manager** node and select **Deployment Directories**.
3. In the Deployment Directories dialog box, select the application server (for example, **SASApp**) that is associated with the scheduling server machine. Then click **New**.
4. In the New Directory dialog box:
 - a. Enter a name for the deployment directory (for example, **Batch Jobs**).
 - b. Enter the path for the deployment directory, or click **Browse** to navigate to the path. You can enter either a fully qualified path, or a path that is relative to the application server configuration directory (*SAS-config-dir\Lev1\SASApp*).
 - c. Click **OK**.
5. Click **OK** to exit the Deployment Directories dialog box.

Defining a Generic Batch Server

A generic batch server is a component of a SAS application server that provides the command to run jobs from SAS applications or solutions that are not specifically supported by the SAS Java Batch server subtypes. If a release of a SAS application or solution adds support for scheduling, you can schedule jobs using a generic batch server until the SAS Java Batch server subtypes are updated.

Follow these steps to define a SAS generic batch server:

1. In SAS Management Console, expand the **Server Manager** node.
2. Right-click the application server name with which the generic batch server is associated (for example, **SASApp**), and select **Add Application Server Component**.
3. On the first page of the New SAS Application Server Component Wizard, select **SAS Generic Batch Server** and click **Next**.
4. On the next wizard page, enter a name (for example, **SAS Generic Batch Server**), and click **Next**.
5. On the next wizard page, do the following:
 - From the **Associated Machine** drop-down list, select the name of the machine that contains the SAS Application Server.

Note: The machine name attribute is for documentation purposes only. SAS scheduling does not use this machine name to set up or execute the job.

 - In the **Command** box, enter the appropriate command for the scheduling server.
 - Click **Next**.
6. On the next wizard page, review the information you have entered. If it is correct, click **Finish**.

7. When you finish the wizard, the server appears as a component under the selected SAS application server.

Chapter 6

Scheduling Jobs Using Schedule Manager

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What Is the Schedule Manager?

The Schedule Manager is a SAS Management Console plug-in that works with scheduling servers to schedule jobs that you create in other applications.

The scheduled flows are run on a defined scheduling server.

After you have defined the scheduling servers and batch servers and created and deployed jobs for scheduling, you can use the Schedule Manager to define or edit the schedule and submit the job for scheduling. Using the Schedule Manager, you can perform these tasks:

- create or edit deployed flows, which contain one or more deployed jobs for scheduling.
- create or edit dependencies for jobs in the flow, which are criteria that must be met in order for the job to run. Dependencies can be based on time, other jobs, or files.
- schedule or reschedule a flow to run based on specified conditions (run now, run manually, or run whenever a dependency is met).

To schedule a job using the Schedule Manager, follow these steps:

1. Create a flow, and then add one or more jobs to the flow. A flow is a group of jobs and dependencies.
2. Specify the scheduling server for the flow. The type of scheduling server you select affects the dependencies that are available for the flow.
3. Specify dependencies for the jobs in the flow. Dependencies are events that must occur before the job runs. You can create these types of dependencies:

Time event dependencies

specify that the job runs only when a time-related event occurs (such as a specific date and time being reached or a specified time interval passing)

File event dependencies

specify that the job runs only when a file-related event occurs (such as a file being created or a file reaching a certain age or size)

Job event dependencies

specify that the job runs only when an event related to another job in the flow occurs (such as a job starting or a job completing successfully)

4. Submit the flow to the scheduling server.

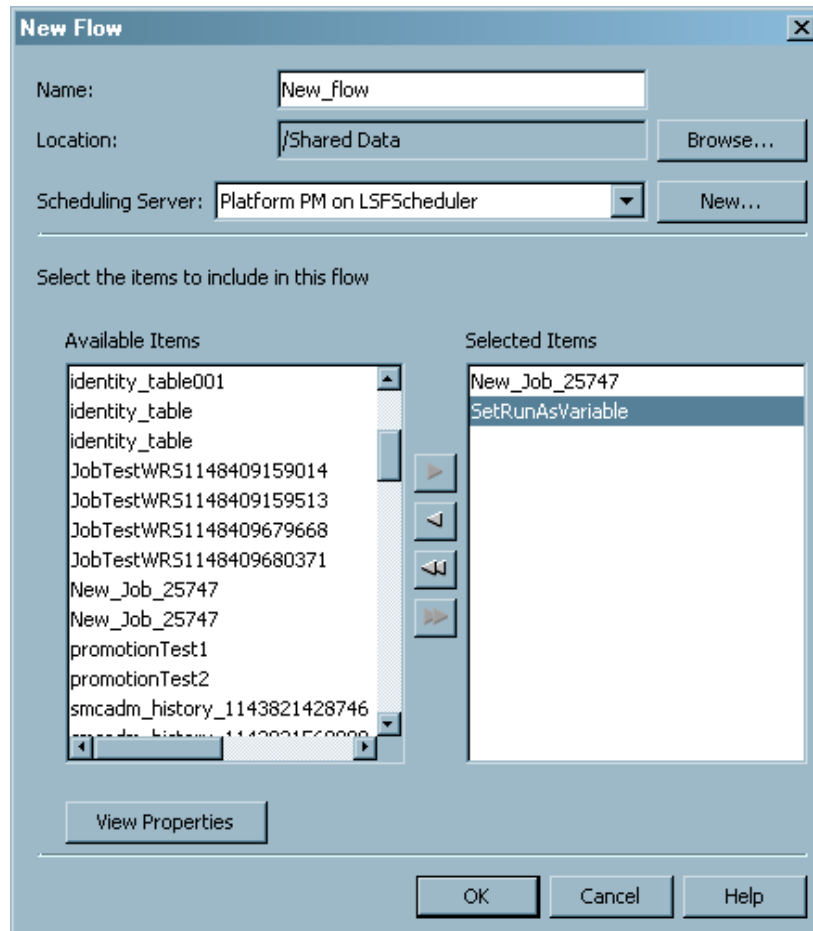
In order to use the Schedule Manager plug-in, your role must have the Schedule Manager capability assigned under Management Console 9.2 capabilities.

Creating a Flow

In order to schedule a job, you must first create a job object, and then add it to a flow or create a new flow. A deployed flow is a group of jobs and their dependencies that have been deployed for scheduling.

To create a new flow,

1. From the navigation tree, select the Schedule Manager plug-in, and then select **New Flow** from the **Actions** menu, the pop-up menu, or the toolbar. The New Flow window appears.



2. In the New Flow window, provide a name and location for the flow. Then select the scheduling server and the jobs that the flow should contain. The drop-down list for the **Scheduling Server** field lists all of the defined scheduling servers. Select the server that you want to use to run the current flow.

The **Available Items** field lists all of the jobs that have been defined and deployed for scheduling. Select a job and use the arrows to move the job to the **Selected Items** list to include it in the flow.

Note: Flows stored in project repositories are not visible in the Folders view in SAS Management Console. Flows scheduled using an in-process scheduling server cannot be scheduled using Schedule Manager. They must be scheduled from within the SAS application (such as SAS Web Report Studio).

3. Click **OK** to close the window and create the flow.

Specifying Dependencies

Overview of Dependencies

After you have created a flow, you can specify dependencies for the flow. Without dependencies, all of the jobs in the flow run immediately and simultaneously. Dependencies let you specify the conditions that must be met before a job in a flow runs.

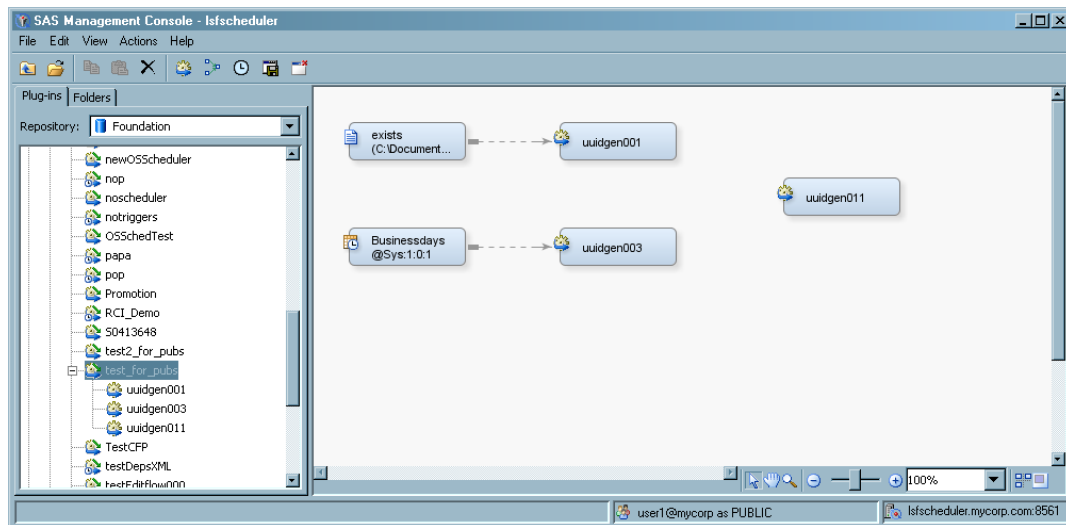
To create dependencies, you can use either the visual flow editor or the standard interface.

Using the Visual Flow Editor

After you have selected the jobs to be included in a flow, you can use the visual editor to graphically display the flow. The visual editor displays the dependencies and relationships between the jobs, enabling you to better understand the structure of complex flows. You can also add jobs and gate nodes to the flow.

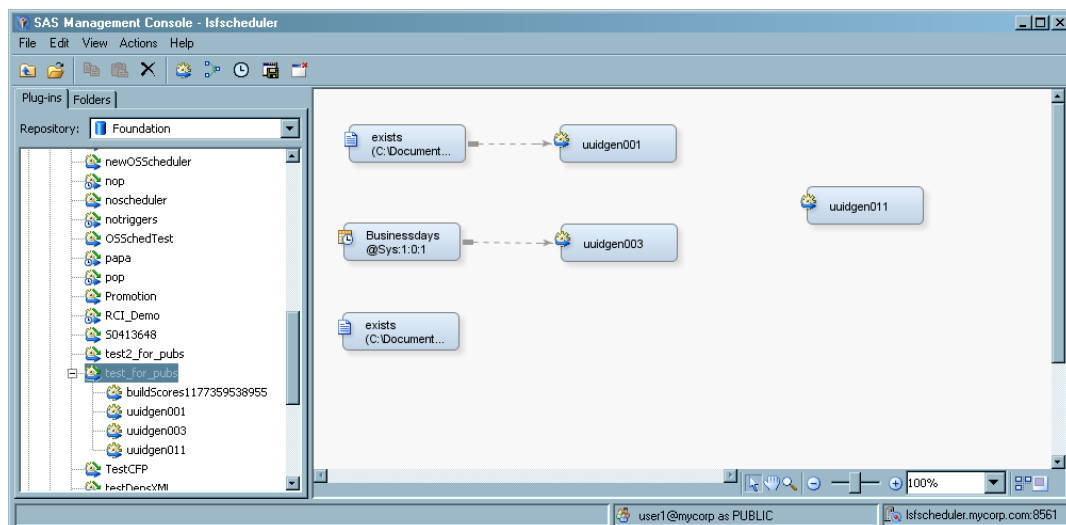
To use the visual editor, follow these steps:

1. In the navigation area, select a defined flow and select **Actions** ⇒ **Edit Flow**. The flow is displayed graphically in the display area.



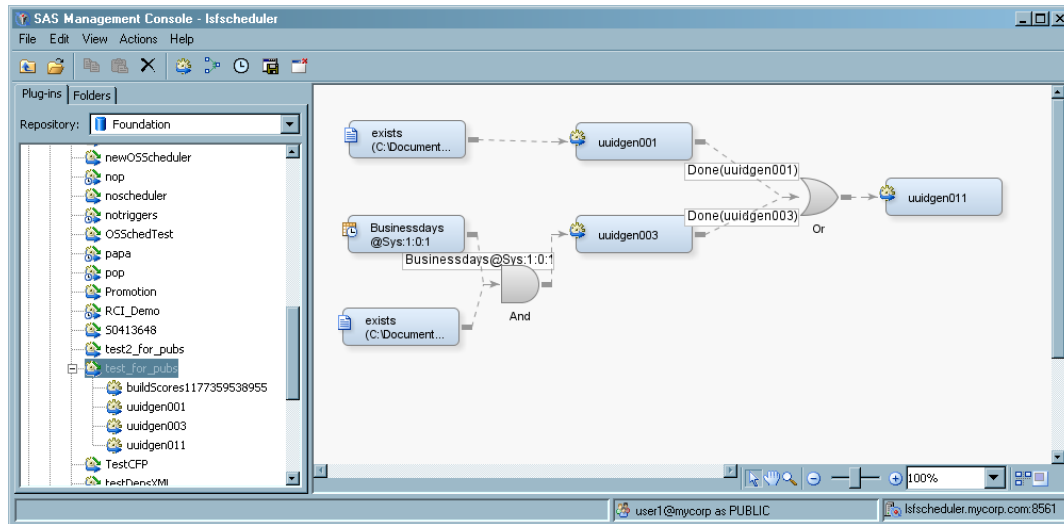
The dashed lines identify the relationship between a job and a dependency. You can select and move any element in the window. To connect elements in the window, move the cursor to an open end of the element and drag the line to another element. Inputs are on the left side of an element and outputs are on the right side.

2. Add a file event, a time event, a deployed job, or a subflow to the flow by selecting the appropriate choice from the **Actions** menu, the toolbar, or the context menu. When file events and time events are added, they are not associated as a dependency with any job. You must incorporate the event into the flow in order for the event to function.

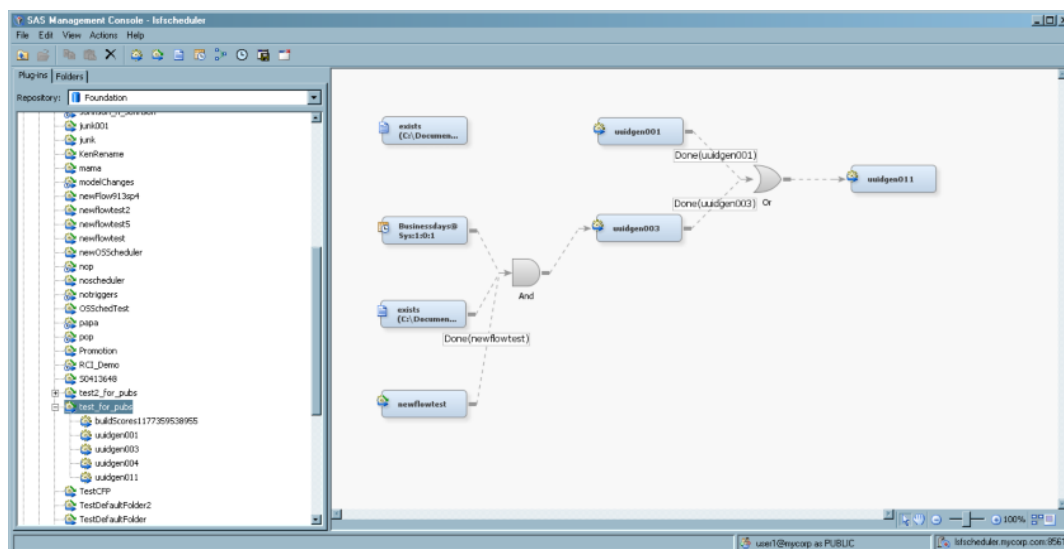


3. Add a gate node to the flow by selecting **Actions** ⇒ **Add Gate**. The Add a Gate Node dialog box appears. A gate node specifies a condition where a job runs when either one or more specified conditions occur or all specified conditions occur. Select the type of gate you want to use and click **OK**. The node appears in the editor, but is not identified with any jobs.
4. To specify the input for a gate, move the cursor to the open end of a job or event and drag the dashed line to the input for the gate. When you connect a job to a gate, the New Job Event dialog box appears, where you can specify the condition for the event.

To specify the output for the gate, move the cursor to the output end of the gate and drag the line to the input for the job.



5. Add a subflow by selecting **Actions** ⇒ **Add Subflow**. The Add Subflow dialog box appears. Select a flow that you want to include as a subflow in your flow and click **OK**. The subflow appears in the editor as a job event. You can specify the subflow as a job event dependency for a job in the flow or add it as an input for a gate node.



6. Select **Actions** ⇒ **Save Flow** to save the flow and leave the visual editor open. Select **Actions** ⇒ **Close Flow** to save the flow and close the visual editor. Select **Actions** ⇒ **Schedule Flow** to save and schedule the flow on the selected scheduling server.

Using the Standard Interface

To use the standard interface to create a dependency for a job in a flow,

1. From the navigation tree, select the Schedule Manager plug-in and select the flow inside which you want to create job dependencies. Click the plus sign next to the flow to display the jobs that are contained in the flow. Select a job for which you want to specify dependencies and select **Manage Dependencies** from the pop-up menu, the **Actions** menu, or the toolbar. The Dependencies window appears.

Manage Dependencies

Grouping dependencies

☒ Run the deployed job when any of the conditions occur

☐ Run the deployed job only when all of the conditions occur

Time events

Businessdays@Sys:1:0:1

New...

Job events

Done(newflowtest)

New...

File events

exist ({reports\\daily_report.xls})

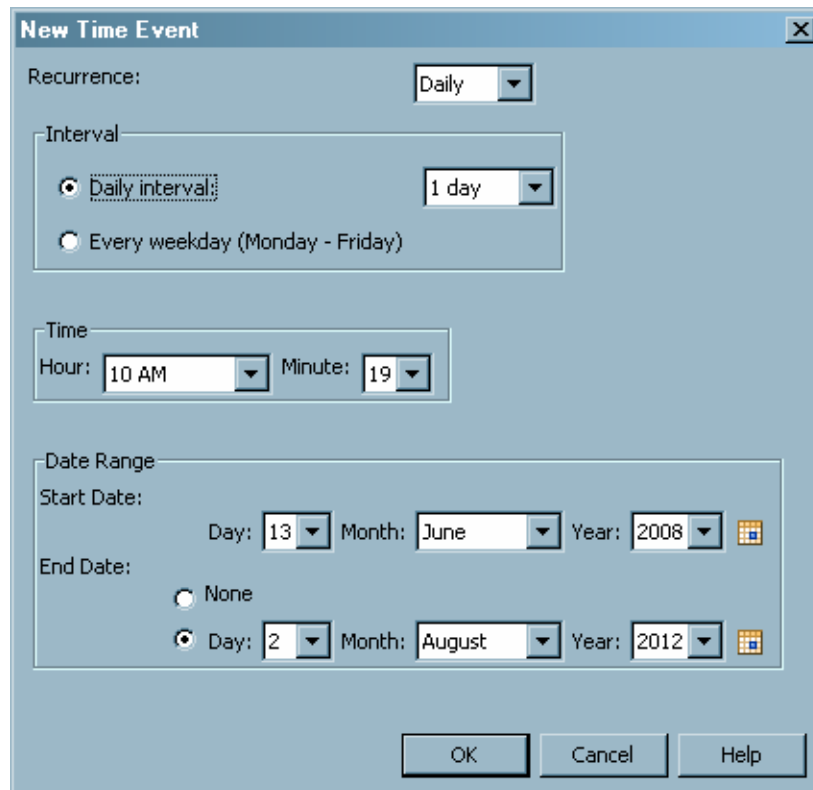
New...

Edit Delete

OK Cancel Help

2. The Dependencies window lets you specify time dependencies (the job runs at a specified time or day), job dependencies (the job runs based on another job in the same flow), and file dependencies (the job runs based on conditions associated with a specified file). You can also specify whether the job runs only when certain dependencies are met, or if all dependencies must be met.

- Click **New** next to the **Time dependencies** list to define a new time dependency. A time dependency specifies that the job runs on a specified day at a specified time.

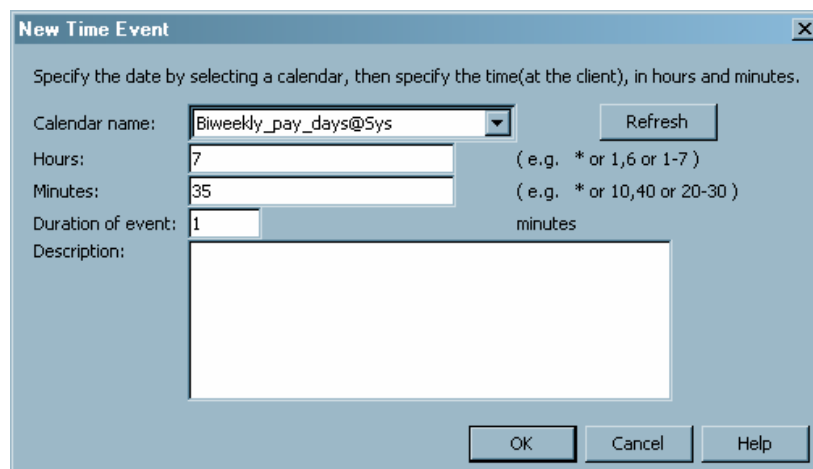


The 'New Time Event' dialog box in the server-dependent format includes the following fields:

- Recurrence:** A dropdown menu set to 'Daily'.
- Interval:** A group box containing:
 - ☒ **Daily interval:** A dropdown menu set to '1 day'.
 - ☐ **Every weekday (Monday - Friday)**
- Time:** A group box containing:
 - Hour:** A dropdown menu set to '10 AM'.
 - Minute:** A dropdown menu set to '19'.
- Date Range:** A group box containing:
 - Start Date:** Fields for Day (13), Month (June), and Year (2008), with a calendar icon.
 - End Date:**
 - ☐ **None**
 - ☒ Fields for Day (2), Month (August), and Year (2012), with a calendar icon.
- Buttons:** OK, Cancel, and Help.

In the New Time Event dialog box, select the type of recurrence (if any) and then specify the interval between runs, and the dates and times when the jobs run. Click OK when you have finished defining the event.

If you are using a Platform Computing scheduling server and have not selected the **Define time events in a server-independent format** option (on the Options window for Schedule Manager), the New Time Event dialog box uses a different format.



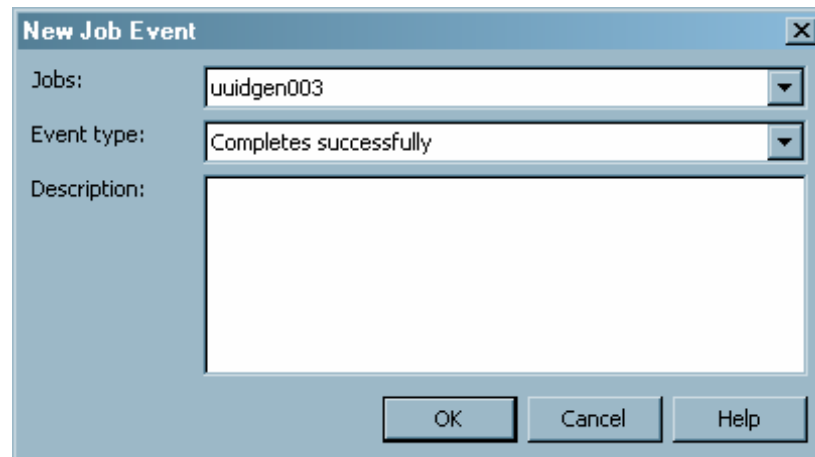
The 'New Time Event' dialog box in the server-independent format includes the following fields:

- Instruction:** 'Specify the date by selecting a calendar, then specify the time(at the client), in hours and minutes.'
- Calendar name:** A dropdown menu set to 'Biweekly_pay_days@Sys', with a 'Refresh' button to its right.
- Hours:** A text field containing '7', with a note '(e.g. * or 1,6 or 1-7)'.
- Minutes:** A text field containing '35', with a note '(e.g. * or 10,40 or 20-30)'.
- Duration of event:** A text field containing '1', with the unit 'minutes' to its right.
- Description:** A large empty text area.
- Buttons:** OK, Cancel, and Help.

In this version of the New Time Event dialog box, you must first select the calendar from the **Calendar name** drop-down list. The calendar identifies the days for the dependency. Refer to the online Help for the Schedule Manager plug-in for more information.

After you specify the calendar, use the **Hours** and **Minutes** fields to specify the time at which the job runs. Specify how long the job is active in the **Duration of event** field. This field specifies the number of minutes after the specified time has been reached that the dependency remains active (for example, when the job should start at a certain time but has to wait for the completion of a file event). Click **OK** when you have finished defining the event.

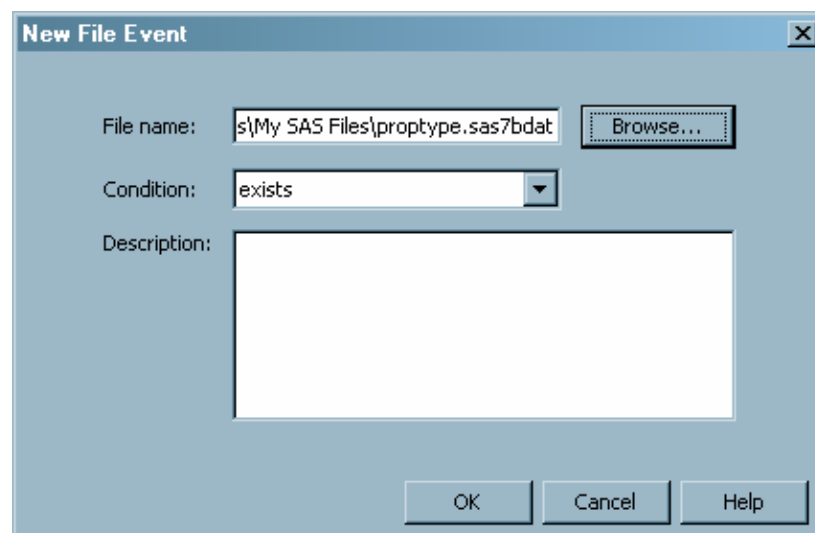
4. Click **New** next to the **Job dependencies** list to define a job dependency. A job dependency specifies that the current job runs if a specified event occurs with another job. For example, you can specify that the current job runs when Job A completes successfully, or you can specify that it runs when Job A ends with a specified exit code.



The **New Job Event** dialog box has a title bar with a close button. It contains three fields: **Jobs:** with a dropdown menu showing 'uuidgen003'; **Event type:** with a dropdown menu showing 'Completes successfully'; and **Description:** with a large empty text area. At the bottom are three buttons: **OK**, **Cancel**, and **Help**.

In the New Job Event window, select the job that the current job is dependent on from the **Jobs** drop-down list, and then select the event that is part of the dependency from the **Event Type** drop-down list (such as successful completion, ending with a specified exit code, or failing to start). Some event types require you to specify additional information (such as an exit code or a run time) that is part of the dependency. Not all event types are supported on all scheduling server types. Click **OK** when you have finished defining the dependency.

5. Click **New** next to the **File dependencies** list to define a file dependency. A file dependency specifies that the current job runs if a condition is met on a specified file. For example, you can specify that the current job runs whenever File B is created, or that it runs when File B becomes larger than a specified size.



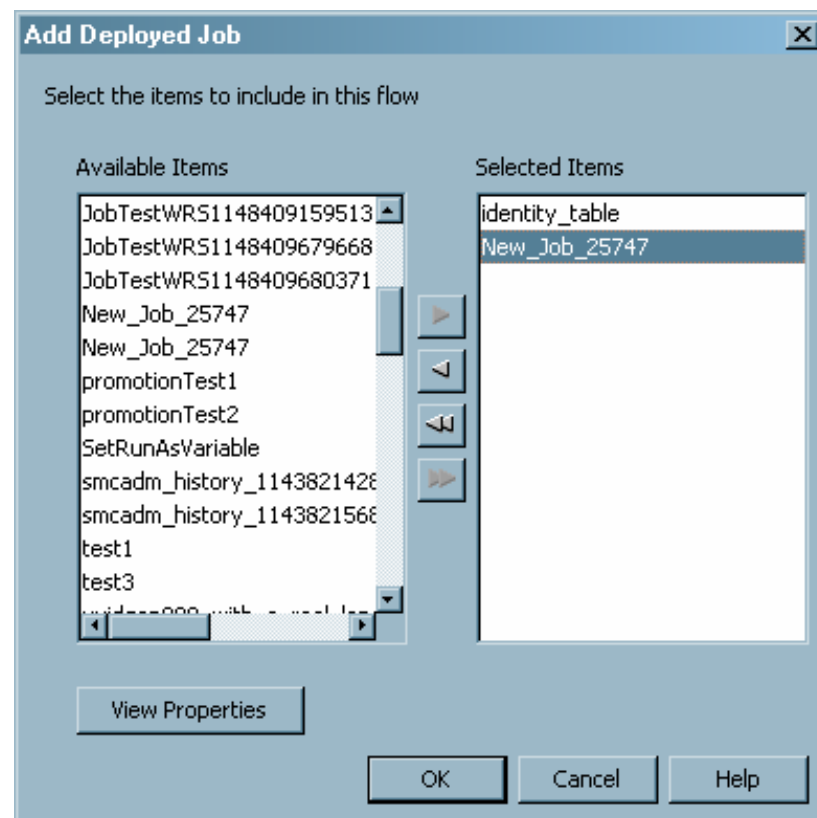
The **New File Event** dialog box has a title bar with a close button. It contains three fields: **File name:** with a text box containing 's:\My SAS Files\proptype.sas7bdat' and a **Browse...** button; **Condition:** with a dropdown menu showing 'exists'; and **Description:** with a large empty text area. At the bottom are three buttons: **OK**, **Cancel**, and **Help**.

In the New File Event window, specify the file (in Windows, you must specify the full path) upon which the job is dependent in the **File name** field and the file state that must exist in the **Condition** field (such as that the file exists, that the file is a specified size, or that the file is beyond a certain age). Not all file event types are supported on all scheduling server types. Click **OK** when you have finished defining the dependency.

- When you have finished defining dependencies for the selected job, click **OK** in the Dependencies window.

Adding Jobs to a Deployed Flow

You can add jobs to an existing deployed flow after it has been created. Select a flow, and then select **Add a Job** from the pop-up menu, the toolbar, or the **Actions** menu. Use the Add Deployed Job dialog box to select from the jobs that have been deployed for scheduling.



Setting Deployed Flow Properties

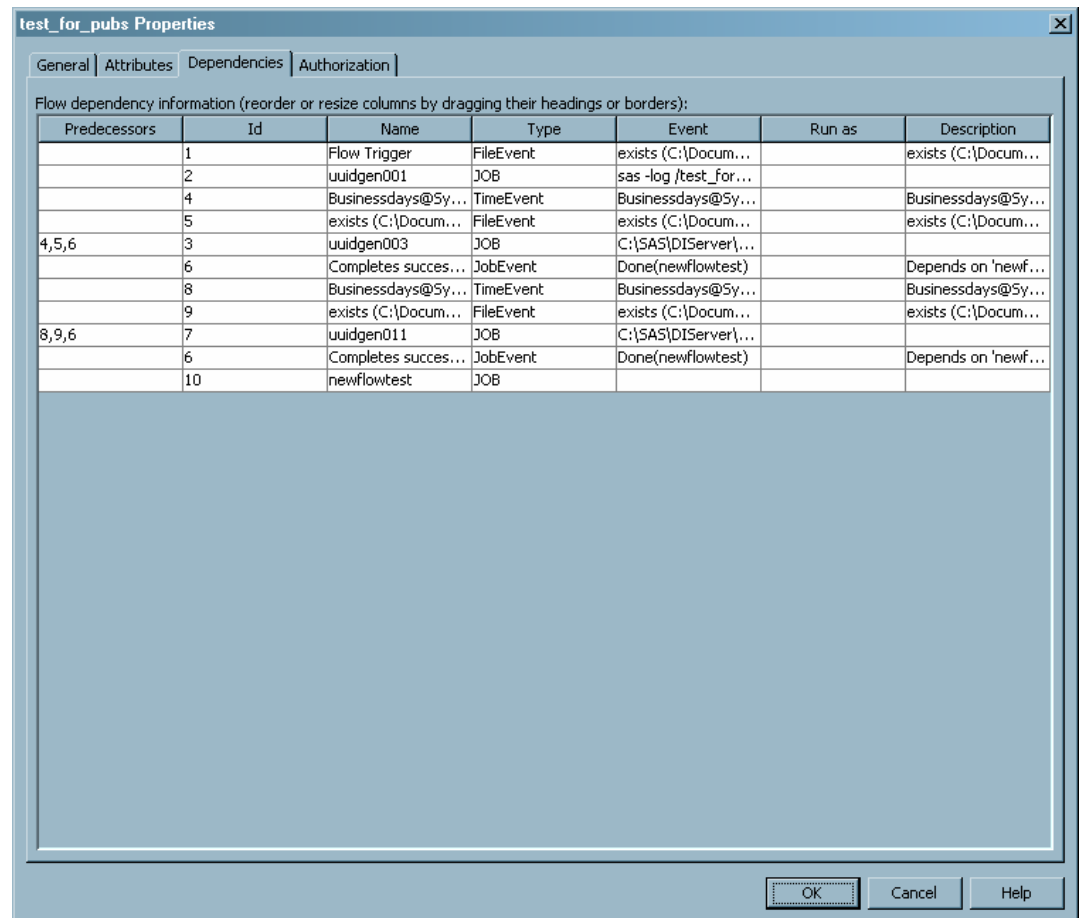
After you have created a flow, you can use the Schedule Manager to view properties for the flow or jobs that are part of the flow. Select a deployed flow or job in the navigation tree and then select **Properties** from the pop-up menu or the **File** menu. You can also use the Properties window to define authorization settings for the flow or job.

The Properties window for a flow also lets you specify options for the flow. The Attributes tab enables you to specify the condition for the flow to be considered as completed, the default queue on the scheduling server for the flow, and any e-mail notifications you should receive based on the condition of the flow. The attributes available depend on the type of scheduling server associated with the deployed flow.

The screenshot shows the 'test_for_pubs Properties' dialog box with the 'Attributes' tab selected. The 'Scheduling Server' is set to 'Platform PM 3.1 on LSFScheduler'. The 'Flow completion criteria' section has three radio buttons: 'All items complete successfully or any item fails' (selected), 'All selected items end', and 'Any of the selected items end'. The 'Default Queue' is set to 'use default'. The 'Email Notification' section is checked, with 'When' set to 'Flow Ends' (checked) and 'Flow ends with errors' (selected). The 'Email Address' field is empty. The 'Available Items' list contains 'newflowtest', 'uuidgen001', 'uuidgen003', and 'uuidgen011'. The 'Selected Items' list is empty. The 'OK', 'Cancel', and 'Help' buttons are at the bottom right.

Available Items	Selected Items
newflowtest	
uuidgen001	
uuidgen003	
uuidgen011	

The Dependencies tab contains a table of all the dependencies in the flow and their relationships to the jobs in the flow.



Deleting Jobs and Flows

To delete a job, follow these steps:

1. In the navigation area, select the **Schedule Manager** node and select **Manage Deployed Jobs** from the **Actions** menu or the context menu. The Manage Deployed Jobs dialog box displays.
2. The Manage Deployed Jobs dialog box contains a list of all deployed jobs, organized depending on whether the job is in a flow.
3. Select a job and click **Delete**. The job is deleted and is no longer available for scheduling.

To remove a job from a flow, follow these steps:

1. In the navigation area, expand the flow that contains the job you want to delete.
2. Select the job and then select **Delete** from the context menu or the **Edit** menu. The Delete Deployed Job dialog box displays.
3. Choose whether you want to delete the job only from the current flow, or also from all flows that contain the job. The dialog box contains a list of all of the flows that contain the job.

- If you specify that you want to remove the job from all flows, you can also specify whether the job should remain available for scheduling. If it remains available, you can include the job in other flows. Otherwise, the job is removed entirely and cannot be scheduled.

To delete a flow that has not been scheduled or that has been scheduled using a Platform Process Manager scheduling server, select the flow in the navigation area and select **Delete** from the context menu or the **Edit** menu.

To delete a flow that has been scheduled using an operating system scheduling server, you must first manually cancel the flow. See “[Setting Up Scheduling Using Operating System Scheduling](#)” on page 19 for information on canceling flows. After the flow has been canceled, you can delete the flow in the Schedule Manager.

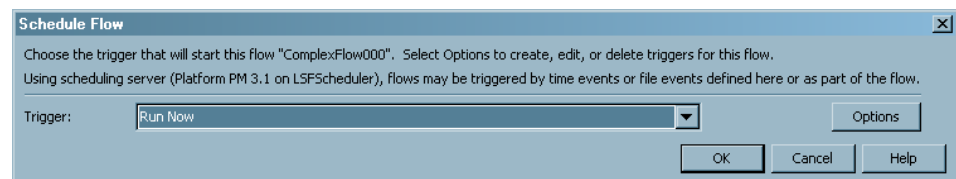
Scheduling Flows

After you have created a deployed flow and defined dependencies for the jobs in the flow, you can schedule the flow to run. Scheduled deployed flows are sent to the scheduling server, where the dependencies are evaluated. You can specify that a selected deployed flow is scheduled to run according to a specified trigger.

To schedule a deployed flow,

- From the navigation tree in SAS Management Console, select the Schedule Manager and select the deployed flow you want to schedule. Select **Schedule Flow** from the pop-up menu, the toolbar, or the **Actions** menu. The Schedule Flow window appears.

Display 6.1 Schedule Flow Window



- Select the condition under which the flow should run from the **Trigger** drop-down list. Valid values are as follows:

Run Now

specifies that the flow is sent to the scheduling server, which evaluates any dependencies and immediately submits the jobs in the flow to be executed by the scheduling server one time only. This option is useful for testing purposes.

Manually in Flow Manager

specifies that the flow is sent to the scheduling server, which evaluates any dependencies but does not run the jobs in the deployed flow. The flow is held until the jobs are run manually, either with the Flow Manager application (for Platform Process Manager scheduling servers) or operating system commands (for operating system scheduling servers).

<selected dependency>

specifies that a defined dependency for the flow is a trigger for the deployed flow. The dependency is defined only for the flow. A flow that uses a dependency as a trigger runs each time the conditions for the dependency are met. To define a new time or file dependency as a trigger for the flow, click **Options**. This option is useful for scheduling flows for production.

3. If you scheduled the flow on a Platform Process Manager scheduling server, you can use the Flow Manager application to view the history of a deployed flow or job, rerun a flow or job, or stop a flow from running. If you scheduled the job on an operating system scheduling server, you can use operating system commands to manage the deployed flow. See the Help for the Schedule Manager for more information.

Chapter 7

Scheduling Jobs from SAS Data Integration Studio

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Overview of Scheduling for SAS Data Integration Studio

To schedule jobs that are created by SAS Data Integration Studio, you can use either Platform Suite for SAS or your operating system scheduler. If you use the operating system scheduler, fewer scheduling features are available.

Scheduling of SAS Data Integration Studio jobs works as follows:

1. Users create jobs by using SAS Data Integration Studio. The job definitions are stored in job objects in the metadata repository.
2. Users deploy jobs for scheduling by using SAS Data Integration Studio. The deployment process does the following:
 - a. creates a SAS program based on the job metadata
 - b. places the SAS program in the specified deployment directory on the SAS batch server
 - c. creates a metadata object for the deployed job
3. An administrator uses Schedule Manager in SAS Management Console to create and schedule a flow that includes the deployed job. Schedule Manager passes the schedule information and the associated commands to the designated scheduling server (either the Process Manager Server or an operating system scheduling server). To construct the commands, Schedule Manager uses the Command Line and Log Directory attributes of the SAS DATA Step Batch server definition.
4. If you are using Platform Suite for SAS, then Platform Process Manager submits the scheduled job to Platform LSF at the designated time (or after the designated dependent event), and the SAS DATA Step Batch server executes the job. Information about the job status is stored on the scheduling server. Administrators can use Platform Flow Manager to view the status of the job.

If you are using an operating system scheduling server, then the operating system submits the job at the designated time. Administrators can use operating system tools to view the status of all scheduled flows. Users who are not administrators can view and edit only the flows that they own.

Enabling the Scheduling of SAS Data Integration Studio Jobs

Requirements for Scheduling SAS Data Integration Studio Jobs

In addition to the scheduling server, a scheduling environment for SAS Data Integration Studio jobs requires the following:

a deployment directory

A deployment directory is a location on the file system of the SAS application server that contains the scheduling server component. The scheduling server must have access to the deployment directory. A corresponding definition for the deployment directory must exist in the metadata repository. When a SAS Data Integration Studio user deploys a job for scheduling, a job is generated and placed in this directory. When the job is executed, the job information is read from this directory.

The initial configuration process should have created a physical deployment directory in the path *SAS-config-dir\Lev1\SASApp\SASEnvironment\SASCode\Jobs*, and a corresponding deployment directory definition in the metadata repository.

If you need to set up a deployment directory manually, see [“Define a Deployment Directory” on page 33](#).

a SAS DATA Step Batch Server

A SAS DATA Step Batch server is a metadata object that specifies the command to execute SAS code that is generated by SAS Data Integration Studio jobs. The metadata specifies the location of the command on the scheduling server and where the resulting log files are to be stored on the SAS application server that contains the scheduling server component.

If your configuration plan included the SAS DATA Step Batch server, the initial configuration process should have created a definition for a server called SAS DATA Step Batch server, which is a component of your SAS Application Server (for example, SASApp).

If you need to set up a SAS DATA Step Batch server manually, see [“Defining a SAS DATA Step Batch Server” on page 33](#).

Deploying Data Integration Studio Jobs for Scheduling

When you have completed the appropriate setup tasks, SAS Data Integration Studio users can deploy jobs for scheduling. The procedure for deploying jobs is as follows:

1. In SAS Data Integration Studio, right-click a job and select **Scheduling** ⇒ **Deploy**.

2. In the Deploy a Job for Scheduling dialog box, do the following:
 - a. Select the batch server (for example, **SASApp - SAS DATA Step Batch Server**) where the job is to be executed.
 - b. Select the deployment directory where the generated job is to be stored.
 - c. A default filename for the job is displayed. You can modify the filename, but it cannot contain blanks or other characters that are invalid on the operating system.
 - d. Click **OK**.
3. If you are prompted for a user ID and password for the application server, enter the appropriate credentials. The credentials are validated through the application server's workspace server connection.
4. Click **OK** in the Deploy for Scheduling dialog box.

SAS Data Integration Studio generates SAS code from the job metadata, transfers the file to the deployment directory location on the scheduling server, and creates job metadata for the Schedule Manager to use.

For information on using Schedule Manager to schedule a job, see [“Scheduling Jobs Using Schedule Manager” on page 37](#).

Troubleshooting the Scheduling of SAS Data Integration Studio Jobs

User credentials play an important role in the scheduling and execution of SAS Data Integration Studio jobs. When SAS Data Integration Studio deploys a job for scheduling, it generates a SAS file as the `-sysin` value for running SAS in batch mode. Generated SAS programs often contain LIBNAME statements that specify credentials for the data sources in the library. If an issue occurs in scheduling or executing a SAS Data Integration Studio job, check to determine whether one of the following situations has occurred:

- Has a user's password changed? If the password has changed, you will need to either redeploy the job to update the SAS file with the new credentials, or edit the generated SAS file to update the credentials.
- Are the specified credentials valid in the scheduling environment? The user who generated the job might have credentials that are valid in SAS Data Integration Studio but not in the scheduling environment. Typically, the user who runs the scheduled job is also the user who scheduled the job in SAS Management Console, although you can use the Advanced Properties dialog box to specify another user to run the job. If the credentials are not valid, you will need to either redeploy the job with the appropriate credentials, or edit the generated SAS file to update the credentials.

For additional troubleshooting information, see [“Resolving Issues Related to Scheduling with Platform Suite for SAS” on page 13](#).

Chapter 8

Enabling the Scheduling of Reports

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How Report Scheduling Works

You can schedule SAS reports using either Platform Suite for SAS or an in-process scheduling server, and by using either SAS Web Report Studio or SAS Management Console.

The scheduling process from SAS Web Report Studio is as follows:

1. Users create reports using SAS Web Report Studio. The report definitions (.srx files) are stored in the WebDAV repository or on a file system, and metadata about the reports (including permissions information) is stored in the metadata repository.
2. Users create schedules for particular reports using SAS Web Report Studio. Information about the scheduled report jobs is stored in the metadata repository. The job information is also passed to the in-process scheduling server or to the Process Manager Server. The command for the job is created using information from the SAS Java Batch server definition.

3. Jobs and flows are automatically created when the report is scheduled in SAS Web Report Studio. Users can use the Schedule Manager in SAS Management Console to reschedule the flow and change the report schedule.
4. Depending on the scheduling server used, either the Platform Process Manager server submits the job for execution or the in-process scheduling server submits the job to SAS Web Report Studio for execution at the designated time (or after the designated dependent event).
5. The Batch Generation Tool, running on the scheduling server, executes the report and places the output in the location designated by the repository (the WebDAV server or the file system). Metadata about the report output is stored in the metadata repository. If you are scheduling using Platform Suite for SAS, information about the job status is stored on the Process Manager Server. Administrators can use Platform Flow Manager to view the status of the job.

If report distribution has been set up, then the report output is also sent to the appropriate destinations when the user bursts the report. For information about report distribution, see “Scheduling and Distributing Pre-generated Reports” in the *SAS® 9.2 Intelligence Platform: Web Application Administration Guide*.

6. Users can view the static output by using SAS Web Report Studio (or another application, such as the SAS Information Delivery Portal).

To schedule reports, you must install and configure Platform Suite for SAS or configure a SAS in-process scheduling server.

Enabling Report Scheduling with In-Process Scheduling

Overview of Tasks

To enable users to use the report scheduling capabilities of SAS Web Report Studio with in-process scheduling, several setup tasks are required. If you implemented scheduling when you installed SAS Web Report Studio, all setup tasks were performed automatically.

If you implement scheduling after installation is complete, you must complete these setup tasks:

1. Verify or define a SAS Java Batch Server with a subtype of Reporting and a SAS In-Process Services Server.
2. Identify the scheduling server type to SAS Web Report Studio.
3. Define archive paths for publishing reports to channels.
4. Test the configuration.

Step 1: Define Servers

A SAS Java Batch Server definition and a SAS In-Process Services Server definition are automatically created by the SAS Deployment Wizard. Verify that Reporting is selected as the value for the SubType field in the SAS Java Batch Server definition.

If you did not implement scheduling when you installed SAS, you might need to define a SAS Java Batch Server or SAS In-Process Services Server manually. Use the Server

Manager plug-in in SAS Management Console to create the definitions. See [“Defining a SAS Java Batch Server” on page 32](#) for detailed information. You must select a value of Reporting for the SubType field in the SAS Java Batch Server definition.

Note: Do not define more than one SAS In-Process Services server. Using multiple servers will cause errors when you attempt to schedule a report.

Step 2: Identify the Scheduling Server Type

In order to ensure that SAS Web Report Studio uses in-process scheduling, you must specify the type of scheduling server that the application uses. This step is particularly important if you have both a SAS In-Process Services server and a Platform Process Manager server defined. Follow these steps:

1. In the SAS Management Console Plug-Ins tab, expand the **Configuration Manager** plug-in.
2. Right-click on Web Report Studio 4.2 to display the Web Report Studio 4.2 Properties dialog box.
3. Select the **Settings** tab.
4. In the **Application** field, select **Scheduling**.
5. In the **Scheduling Enabled** field, select Yes.
6. In the **Scheduling Server Type** field, select **SAS In-Process Services**.
7. Close the Properties dialog box and restart your Web application server.

Step 3: Define Archive Paths

Scheduled reports can be distributed to channels that are defined using the SAS Publishing Framework. If users will be distributing reports to channels that use archive locations (persistent stores), then the archive location must be accessible to SAS Web Report Studio.

To specify the appropriate archive path, follow these steps:

1. In SAS Management Console, expand the **Publishing Framework** node.
2. Expand the appropriate metadata repository node.
3. Expand the **Channels** node.
4. Right-click the channel to which you will be publishing reports, and select **Properties**.
5. In the Properties dialog box, select the **Persistent Store** tab.
6. In the **Type of persistent store** area, select the **Archive** radio button.
7. In the **Path** box, specify the path to a network location that all users who will be creating content can write to.
8. Click **OK**.

You might also need to update permissions on the physical folder to allow access for the users who will be publishing reports. For information about setting up publication channels, see “Adding SAS Publication Channels” in the *SAS® 9.2 Intelligence Platform: Web Application Administration Guide*.

Step 4: Test the Configuration

After you have completed all of the configuration steps, use the following procedure to test your configuration. To create a report, you must have the Create Report capability in the Web Report Studio: Report Creation role. To schedule a report, you must have the Schedule Own Report capability from the Web Report Studio: Report Creation role.

1. On a client machine, use SAS Web Report Studio to create and schedule a report as follows:
 - a. Create and save a simple report.
 - b. Click **View Report** to display the report.
 - c. Select **File** ⇒ **Schedule**.
 - d. On the Schedule Report page, select **Now**, and click **Next**.
 - e. On the next page, click **Finish**. If the word **Running** appears in the status field, wait for the job to finish.
2. In SAS Management Console, check the properties of the scheduled report as follows:
 - a. Select the **Folder View** tab and expand the folders until you locate the report that you scheduled.
 - b. Right-click the report, and choose **Properties**.
 - c. Select the **Content** tab. A folder called **Batch** should be displayed on this tab. The folder contains the output of the scheduled report.
3. If the **Batch** folder is present on the report's **Content** tab, as described in the previous step, then return to SAS Web Report Studio and complete these steps:
 - a. Log out, and then log back in.
 - b. Open the report. The following message should appear at the top of the report:

To interact with this report, you must first refresh the data.

If this message appears, then a batch copy of the report is displayed and the configuration is correct.

Enabling Report Scheduling with Platform Suite for SAS

Overview of Enabling Report Scheduling

To enable users to use the report scheduling capabilities of SAS Web Report Studio, you must first install and configure Platform Suite for SAS.

Note: If you are using a Platform Process Manager server, the Platform LSF scheduling server machine must be the same machine on which the SAS Business Intelligence Report Services is installed.

When the preceding requirements are in place, complete the following additional setup tasks:

1. Create the necessary users, groups, and logins.
2. Verify that a SAS Java Batch Server with a subtype of Reporting has been created.
3. Identify the scheduling server type to SAS Web Report Studio.
4. Update the SAS Web Report Studio configuration information.
5. Update the LSF password file (Windows only).
6. Verify logging for the Output Generation Tool.
7. Edit the initialization file for the Output Generation Tool.
8. Define archive paths for publishing reports to channels (optional).
9. Test the configuration.

The scheduling software must be installed on the same machine as the commands it executes. For SAS Web Report Studio, this is the location where the Output Generation Tool is installed.

Step 1: Create the Necessary Users, Groups, and Logins

Ensure That the Required Operating System User Accounts Are Present

The following user accounts must be added to the operating system of the scheduling server:

Table 8.1 User IDs Needed for Report Scheduling

User ID	Purpose
lsfuser (suggested name)	Used by Web Report Studio to connect to Platform Suite for SAS and to run the Output Generation Tool, which creates scheduled reports in batch mode. This user is sometimes referred to as the scheduling user.
sastrust@saspw	Used by the Output Generation Tool to obtain user credentials from the metadata server. In a default installation, this user already exists in the metadata repository.
sassrv	Used by SAS Web Report Studio to perform the nightly cleanup of partially deleted jobs. In a default installation, this user already exists in the metadata repository.

Ensure That Metadata Logins Exist for Users Who Will Schedule Reports

For each user who will use SAS Web Report Studio to schedule reports, a login (including a password) must exist in the metadata repository.

To add a login for a user,

1. While you are logged on to SAS Management Console as the SAS Administrator, select **User Manager**. A list of users and groups appears in the right pane.
2. Right-click the user to whose login you want to add a password, and select **Properties**.

3. In the Properties dialog box, select the **Logins** tab. Then right-click the login to which you want to add a password, and click **Modify**.
4. In the Edit Login Properties dialog box, enter the user's password in the **Password** and **Confirm Password** boxes. Then click **OK**.
5. Click **OK** in the Properties dialog box.

Users can manage their own passwords by using the SAS Login Manager.

Step 2: Verify That a SAS Java Batch Server Has Been Defined

A SAS Java Batch Server must be defined as a component of your SAS Application Server. This server is set up automatically by the SAS Deployment Wizard.

To create the server manually, follow the instructions in [“Defining a SAS Java Batch Server” on page 32](#). When defining the server, you must specify the following information:

- In the **Associated Machine** field, you must choose a machine that has Platform LSF and SAS Business Intelligence Report Services installed.
- In the **SubType** field, you must select a value of Reporting.
- In the **Command Line** box, enter a command that contains the following components:

“path-to-outputgen-executable”

The fully qualified path to the **outputgen** executable file, enclosed in quotation marks.

--spring-xml-file*spring-file-location*

The fully qualified path to the **spring.xml** file, which provides configuration services information to enable outputgen to connect to the SAS Metadata Server. This component must be preceded by two dashes (--).

--repository*metadata-repository*

The name of the repository that contains the job definitions. This component must be preceded by two dashes (--)

Here are examples of valid commands:

Windows example

```
C:\SAS\Config92\Levl\ReportBatch\rptbatch.bat --spring-xml-file C:\SAS\Config92\Levl\Web\Applications\SASBIReportServices4.2\spring.xml --repository Foundation
```

Note: Enter the command with no line breaks, and be sure to put quotation marks around the arguments as shown in the example. If you copy and paste the command, be sure to include a space after **outputgen.exe**. You can verify the command by pasting it into a DOS command window. The command should execute with no errors. (You can ignore **Missing option** messages, unless they pertain to the **--config-file** option or the **--repository** option.)

UNIX example

```
usr/local/Config92/Levl/ReportBatch/rptbatch.sh --spring-xml-file usr/local/Config92/Levl/Web/Applications/SASBIReportServices4.2/spring.xml --repository Foundation
```

Note: Enter the command with no line breaks. If you copy and paste the command, be sure to include a space after **outputgen**. You can verify the command by pasting or typing it into a Telnet window. The command should execute with no errors.

(You can ignore **Missing option** messages, unless they pertain to the **--repository** option.)

CAUTION:

If you have a SAS Java Batch Server that was defined for a release before SAS Web Report Studio 3.1, then create a new definition, reschedule the reports on the new server, and delete the old definition.

Step 3: Identify the Scheduling Server Type

In order to ensure that SAS Web Report Studio uses Platform Suite for SAS scheduling, you must specify the type of scheduling server that the application uses. This step is particularly important if you have both a In-Process Scheduling Services server and a Platform Process Manager server defined. Follow these steps:

1. In the SAS Management Console Plug-Ins tab, expand the **Configuration Manager** plug-in.
2. Right-click on Web Report Studio 4.2 to display the Web Report Studio 4.2 Properties dialog box.
3. Select the **Settings** tab.
4. In the **Application** field, select **Scheduling**.
5. In the **Scheduling Enabled** field, select Yes.
6. In the **Scheduling Server Type** field, select **Platform Process Manager**.
7. Close the Properties dialog box and restart your Web application server.

Step 4: Update the SAS Web Report Studio Configuration

The credentials of the user ID lsfuser must be available to SAS Web Report Studio.

If you have installed and configured the second maintenance release after SAS 9.2, the credentials are managed by the SAS Deployment Manager. You do not need to perform this step.

If you are using a version of SAS that is prior to the second maintenance release after SAS 9.2, or if you have installed the second maintenance release after SAS 9.2 without performing the configuration step, you might have already provided these credentials during the installation. To verify that the credentials are present, and to update the credentials (if necessary), you must use one of the following two procedures.

The first procedure creates the LSF Services group and adds users to the group. Follow these steps:

1. Use the User Manager plug-in in SAS Management Console to create a new authentication domain. The domain must be named LSFServicesAuthWRS.
2. Use the User Manager plug-in in SAS Management Console to create a new group. The group must be named LSFServices.
3. In the Properties dialog box for the LSFServices group, select the Accounts tab and add the user ID that schedules reports in SAS Web Report Studio (typically lsfuser). On Windows systems, you must preface the user ID with a domain (*hostname\lsfuser*). You must also select the LSFServicesAuthWRS authorization domain for the user and provide the current password for the user ID.

4. In the Members tab, add the trusted user (SAS Trust User) as a member of the LSFServicesGroup.

Alternatively, you can add the credentials directly to the SAS Web Report Studio properties. Although this procedure is somewhat less complex, it does have the disadvantage of having credentials in a publicly readable area. To modify the properties, follow these steps:

1. Start SAS Management Console and connect to the metadata server using the credentials of the user who installed the software on this host.
2. Expand the **Application Management** node. Under that node, expand the **Configuration Manager** node.
3. Right-click the **Web Report Studio** node, and select **Properties**.
4. In the Properties dialog box, select the **Advanced** tab.
5. In the list of properties in the **Advanced** tab, look at the value of the **wrs.scheduling.LSFSchedulingServerUID** property (or add the property if it does not exist). If the Property Value column does not contain the user ID **lsfuser**, enter that user ID in the Property Value field. On Windows systems, the ID must be qualified with a domain or machine name.
6. For the **wrs.scheduling.LSFSchedulingServerPW** property, enter the password for lsfuser (if the password is not already present) in the Property Value field. Add the property if it does not exist. You can use a password that is encoded by SAS.
7. Click **OK** to close the Properties dialog box.
8. If you have edited the configuration information, you must restart SAS Web Report Studio.

Step 5: Update the LSF Password File (Windows Only)

If your scheduling server is running on a Windows machine, then you must supply the scheduling server with the credentials for the user ID lsfuser.

The user name and password that you provide in this step must match the ones that you provided in the SAS Web Report Studio configuration, as described in [“Step 4: Update the SAS Web Report Studio Configuration” on page 61](#).

Follow these steps:

1. On the scheduling server, open a Command Prompt window.
2. Use the program **lspasswd** to register the credentials for the user ID lsfuser, as follows:
 - a. Issue a command similar to this:


```
C:\LSF_7.0\7.0\bin\lspasswd.exe -u .\lsfuser
```

The program prompts you for this user's password.
 - b. Enter the user's password and then confirm it. This completes the registration process.

Step 6: Verify Logging for the Output Generation Tool

SAS Web Report Studio uses the Output Generation Tool to create sets of reports in batch mode. When a scheduled report is executed on Windows, the tool records information in a logs directory. (On UNIX systems, the log statements are directed to the console when a scheduled report is executed.) Verify that the directories have been created.

For a default Windows installation, the path is as follows:

```
C:\SAS\config
\Levl\Web\Logs\SASBIReportServices4.2.log
```

For a default UNIX installation, the path is as follows:

```
SAS-config-dir/levx/Applications/SASBIReportServices42/logs
```

Step 7: Edit the Initialization File for the Output Generation Tool (Windows Only)

On Windows systems, you must edit the initialization file for the Output Generation Tool to specify the directory location of the logs that are created when a scheduled report is executed. Complete the following steps:

1. Open the **outputgen.ini** file in a text editor. The file is located in the installation directory for SAS Business Intelligence Report Services.
2. Locate the line that starts with this code:
applogloc=
3. After the equal sign, enter the path to the directory in which you want the tool to create the log file. This should be the same directory that you created in [“Step 6: Verify Logging for the Output Generation Tool” on page 63](#).
4. Save your changes.

Step 8: Define Archive Paths for Publishing Reports to Channels

Scheduled reports can be distributed to channels that are defined using the SAS Publishing Framework. If users will be distributing reports to channels that use archive locations (persistent stores), then the archive location must be accessible to both SAS Web Report Studio and the scheduling software. If the scheduling software and SAS Web Report Studio reside on different machines, then the archive location should be specified as a network path rather than a local path. This step is optional.

To specify the appropriate archive path, follow these steps:

1. In SAS Management Console, expand the **Publishing Framework** node.
2. Expand the appropriate metadata repository node.
3. Expand the **Channels** node.
4. Right-click the channel to which you will be publishing reports, and select **Properties**.
5. In the Properties dialog box, select the **Persistent Store** tab.
6. In the **Type of persistent store** area, select the **Archive** radio button.

7. In the **Path** box, specify the path to a network location that all users who will be creating content can write to.
8. Click **OK**.

You might also need to update permissions on the physical folder to allow access for the users who will be publishing reports. For information about setting up publication channels, see “Adding SAS Publication Channels” in the *SAS® 9.2 Intelligence Platform: Web Application Administration Guide*.

Step 9: Test the Configuration

After you have completed steps 1 through 8, use the following procedure to test your configuration:

1. On a client machine, use SAS Web Report Studio to create and schedule a report as follows:
 - a. Create and save a simple report.
 - b. Click **View Report** to display the report.
 - c. Select **File** ⇒ **Schedule**.
 - d. On the Schedule Report page, select **Now**, and click **Next**.
 - e. On the next page, click **Finish**. If the word **Running** appears in the status field, wait for the job to finish.
2. In SAS Management Console, check the properties of the scheduled report as follows:
 - a. Select the **Folder View** tab and then expand the folders until you locate the report that you scheduled.
 - b. Right-click the report, and choose **Properties**.
 - c. Select the **Content** tab. A folder called **Batch** should be displayed on this tab. The folder contains the output of the scheduled report.
3. If the **Batch** folder is present on the report's **Content** tab, as described in the previous step, then return to SAS Web Report Studio and complete these steps:
 - a. Log out, and then log back in.
 - b. Open the report. The following message should appear at the top of the report:

To interact with this report, you must first refresh the data.

If this message appears, then the configuration is correct.

If the configuration is not correct, see “[Troubleshooting the Configuration](#)” on page 64 .

Troubleshooting the Configuration

If you experience problems when you test the configuration, first use Platform Flow Manager to check for error messages on the Platform scheduling server. For instructions, see “[Check Error Messages in Platform Flow Manager](#)” on page 13 .

Then, check to determine whether any logs were created by the Output Generation Tool. For a default Windows installation, the logs are located in the following path:

C:\Program Files\SAS9.2\SASBIReportServices\4.2\logs

For a default UNIX installation, the path is as follows:

SAS-config-dir/levx/Applications/SASBIReportServices42/logs

If no logs are present in this path, check to make sure that you have completed these tasks:

- created a logs directory, and assigned the appropriate user rights to the directory. See [“Step 6: Verify Logging for the Output Generation Tool” on page 63](#).
- verified that the **applogloc** statement in the **outputgen.ini** file is correct. See [“Step 7: Edit the Initialization File for the Output Generation Tool \(Windows Only\)” on page 63](#).
- accurately entered the command in the **Command Line** field when you defined the SAS Java Batch Server in SAS Management Console. See [“Step 2: Verify That a SAS Java Batch Server Has Been Defined” on page 60](#).

Make sure that quotation marks appear around the arguments, as shown in the example. If you copied and pasted the command, make sure that a space appears after **outputgen.exe**.

On Windows systems, you can verify the command by pasting it into a DOS command window. The command should execute with no errors.

If logs are present in the path, then check for the following error messages:

**An error occurred: Unable to login user. Cause: Access denied.
or Caused by: com.sas.iom.SASIODefs.GenericError: Error
authenticating user SAS Trusted User in function LogonUser.**

Make sure that the user ID and password for the SAS Trusted User (sastrust) are specified correctly in the **OutputManagementConfigTemplate.xml** file. You might need to remove the domain, or make sure that the domain is followed by a forward slash (/) rather than a backward slash (\).

**An error occurred: Exception while rendering report in batch.
Cause: cxp.002.ex.msg: The connection factory requires an
identity for the authentication domain "DefaultAuth", but the
user context provided for user "SAS Demo User" does not have any
identities for that domain. Therefore, the user cannot be
authorized to use the connection factory.**

Make sure that the SAS Web Report Studio user who is trying to schedule the report has a login (including a password) in the metadata repository. See [“Ensure That Metadata Logins Exist for Users Who Will Schedule Reports” on page 59](#).

For additional troubleshooting information, see [“Resolving Issues Related to Scheduling with Platform Suite for SAS” on page 13](#).

Chapter 9

Scheduling Jobs from SAS Marketing Automation

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Overview of Scheduling for SAS Marketing Automation

SAS Marketing Automation campaigns are scheduled using the Platform Computing scheduling server. Depending on the permissions held by the SAS Marketing Automation user, campaigns can be scheduled directly by the user or sent to an administrator for scheduling.

The following is an overview of the process of scheduling campaigns from SAS Marketing Automation:

- Users create campaigns using the Customer Intelligence Studio. Campaigns include a start and end date and specify any recurrence.
- The user executes the campaign. If the user has the appropriate permissions, the job is sent directly to the scheduling server. Otherwise, the job is deployed for scheduling by an administrator.
- If the campaign is to be scheduled by an administrator, the administrator uses the Schedule Manager to create and schedule a flow that includes the deployed campaign. Schedule Manager passes the schedule information and the associated commands to the scheduling server.
- The Platform Scheduling server executes the campaign at the designated time.

Enabling the Scheduling of SAS Marketing Automation Jobs

Requirements for Scheduling SAS Marketing Automation Jobs

In addition to the scheduling server, a scheduling environment for SAS Marketing Automation jobs includes the following:

a SAS Java Batch server

A SAS Java Batch server is a metadata object that specifies the command to execute SAS code that is generated by SAS Marketing Automation jobs. The initial configuration process should have created a definition for a server called SAS Java Batch Server, which is a component of your SAS Application Server (for example, SASApp). The server must have a subtype of Marketing Automation.

Define a SAS Java Batch Server

A SAS Java Batch server should have been set up during your initial installation and configuration. If you need to set it up manually, follow these steps:

1. In SAS Management Console, expand the **Server Manager** node.
2. Right-click the application server name with which the SAS Java Batch server is associated (for example, **SASApp**), and select **Add Application Server Component**.
3. On the first page of the New SAS Application Server Component Wizard, select **SAS Java Batch Server** and click **Next**.
4. On the next wizard page, enter a name (for example, **SAS Java Batch Server**), and click **Next**.
5. On the next wizard page, do the following:
 - From the **Associated Machine** drop-down list, select the name of the machine that contains the SAS Application Server.
Note: The machine name attribute is for documentation purposes only. SAS scheduling does not use this machine name to set up or execute the job.
 - From the **SubType** list, select Marketing Automation.
 - In the **Command** box, enter the path to the command that starts a SAS session on the scheduling server.
 - Click **Next**.
6. On the next wizard page, review the information you have entered. If it is correct, click **Finish**.

Deploying and Scheduling SAS Marketing Automation Jobs

When you have completed the appropriate setup tasks, SAS Marketing Automation users can submit jobs for scheduling. The procedure is as follows:

1. In Customer Intelligence Studio, specify the start date, end date, and recurrence of a campaign or communication.
2. In the Checklist pane for the campaign, click Execute to open the Execute window.
3. In the Execute window, select a campaign or communication and select an execution option.
4. If you have the required authorization and you selected Send to the scheduling software, the campaign or communication is scheduled using the information provided in the campaign. If you do not have the required authority, an administrator uses the Schedule Manager to schedule the job.
5. If you selected Send to the scheduling software, a job is created for the campaign or communication. After the job is deployed for scheduling, an administrator can use the Schedule Manager to define dependencies and submit the job for scheduling. See [“Scheduling Jobs Using Schedule Manager” on page 37](#) for more information on using the Schedule Manager.

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