QuickStart Guide: SAS® 9.2 Planned Deployments using Electronic Software Delivery

To prepare for your deployment, use the information below to confirm the contents of your software order and review its critical documentation. After you complete those sections of the *QuickStart Guide,* follow the numbered steps to perform your software deployment.

Confirm your order

- Confirm that your SAS Software Order E-mail lists the software that you expect to receive.
    - If it is not what you expected, contact SAS Customer Service at 1-800-727-0025.
    - This software list is also in the *SAS Order Information* document available from your SAS Software Depot (the repository for your SAS software) at `/install_doc/<order number>/soi.htm`
- If you have not downloaded your software, follow the instructions in the SAS Software Order E-mail.
    - The SAS Download Manager stores your software in a SAS Software Depot at the location you choose.

Review critical documentation

- If you have not reviewed them yet, please refer to the System Requirements.
    - To search for system requirements documentation for SAS Foundation and the other products in your software order, use the Quick Links listed here:
      http://support.sas.com/documentation/installcenter/922/index.html
    - Third-party reference information is available from Third Party Software Requirements,
      http://support.sas.com/resources/thirdpartysupport/index.html
    - Later steps in this *QuickStart Guide* address requirements that are described in the following locations:
        - the checklist that is included with the Deployment Plan
        - the `ordersummary.html` file in your SAS Software Depot
- Review the appropriate requirements for the SAS Installer account:
    - For Windows, the installer account must have Administrator rights (user must be a local administrator on the machine and/or a member of the administrators group; for details see http://support.sas.com/kb/5/055.html).
    - For UNIX, the installer account should be the `sas` account. The `root` account should not be used.
    - For OpenVMS on HP Integrity, the installer account should have bypass privileges enabled. Ensure that the process quotas are set according to the "Minimum and Recommended AUTHORIZE Quotas" section of the *System Requirements for SAS 9.2 Foundation for OpenVMS on HP Integrity*, available from Install Center. In addition, `sys$scratch` and `sys$login` should reside on an ODS-5 volume.
- If you are migrating from SAS 9.1.3, you must prepare your software for migration to SAS 9.2.
    - To prepare, follow the instructions in the *SAS Intelligence Platform: 9.1.3 to 9.2 Migration Guide,* located at
      http://support.sas.com/92administration
- If you have an existing SAS 9.2 deployment, you must prepare for the modifications associated with your software order. Before you perform the software deployment, you must follow the instructions at
  http://support.sas.com/software/updates

Perform your software deployment

1 If you are modifying an existing SAS deployment, perform a backup before you install your new SAS software order.
- Back up the existing `SASHOME` (for example, `C:\Program Files\SAS`) and configuration directories. Follow your site's established backup procedures.
- Back up your metadata. Please see the "Backing Up and Restoring Your System" section of the *System Administration Guide*. The guide is located on the Product Documentation Web site for SAS Intelligence Platform: http://support.sas.com/92administration

2 Complete the pre-installation checklist(s) appropriate for your software order(s).
- Standard deployment plans with checklists are available in Install Center at
  http://www.sas.com/installcenter/plans
- Generic checklists are available in the *SAS 9.2 Intelligence Platform Pre-installation Checklists* located at
  http://support.sas.com/92administration
- If a consultant provided a customized deployment plan, use one of the checklists included with that plan.
- Your checklist identifies third-party software that must be installed before you begin to deploy your SAS software. If necessary, retrieve that software and install it according to the vendor's instructions.

3 **Follow the supplemental instructions for deploying SAS software and required third-party software in the SAS Software Summary.**
- If your order contains alternate or supplemental instructions for certain products, these products are listed in the `ordersummary.html` file with a pathname or a link to the supplemental instructions.
- The SAS Software Summary is located in `/install_doc/<order number>/ordersummary.html`

4 **To install your software order, use the SAS Deployment Wizard in your SAS Software Depot.**
- The software order(s) contained in your SAS Software Depot must be installed using the SAS Deployment Wizard, which presents a set of dialogs to help you install and configure your software. The dialogs can vary depending on the contents of the order and your selections in previous dialogs.
- If the order you are installing contains updates or maintenance for software that is currently installed on your system, the SAS Deployment Wizard will present dialogs about applying them to your existing environment.
- Use the method appropriate for the host where the software will be installed:
  - o Windows users should double-click the `setup.exe` at the root of your SAS Software Depot to start the SAS Deployment Wizard. If your Windows operating system is Windows Vista or later, you may have to right-click the `setup.exe` and select **Run as administrator**.
  - o UNIX users should execute `setup.sh` at the root of the SAS Software Depot.
  - o OpenVMS on HP Integrity users should launch the SAS Deployment Wizard using this command: `run setup_vms.exe`.
- Use the dialogs to install and configure your software. For more information about the choices available in each dialog, use the **Help** button.
- The *SAS Deployment Wizard User's Guide* is available from Install Center, http://support.sas.com/documentation/installcenter

5 **Additional steps may be required for your deployment.**
- If you applied updates or maintenance to an existing deployment, follow the additional configuration and post-configuration steps in Part 2 of *Planning for Maintenance Releases and Product Upgrades for SAS 9.2*. This document is accessible from the *Maintenance Release Announcement* located at http://support.sas.com/software/maintenance/index.html
- Follow any product-specific post-installation steps in the Configuration Guide(s) for your operating system(s). These documents are available from Install Center, http://support.sas.com/documentation/installcenter

SAS Notes
- For the latest installation news, please visit this site for Alert Notes: http://support.sas.com/92installalerts
- For general SAS 9.2 information, please visit this site for the *SAS 9.2 FAQ*: http://support.sas.com/kb/33/144.html

Technical Support
If you need assistance with the software, we ask that only SAS support personnel call our Technical Support Division.
- For U.S. and Canadian customers, support is provided from our corporate headquarters in Cary, North Carolina. You may call (919) 677-8008, Monday through Friday.
- Customers outside of the U.S. can obtain local-language technical support through the local office in their countries. Customers in these locations should contact their local office for specific support hours. See http://support.sas.com/techsup/contact/index.html for contact information for local offices.

Before calling, you may want to explore the SAS Support Web site at http://support.sas.com/techsup/. This site offers access to the SAS Knowledge Base, as well as discussion forums, Technical Support contact options, and other support materials that may answer your questions.

2 July 2010