QuickStart Guide

SAS® 9.4 Installation Kit for Planned Deployments using DVDs
Windows and UNIX

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.

Note: In this *QuickStart Guide*, references to Windows include Microsoft Windows for x64.

CONFIRM YOUR ORDER

✓ **Confirm that you have received the software that you expected.**

- In your installation kit, find the SAS Order Information document, which lists the software that you ordered. If the list does not contain what you expected, contact SAS Customer Service at 1-800-727-0025.
- After you create your SAS Software Depot (a centralized repository of SAS installation files that represents one or more orders), the software list will be in the *SAS Order Information* document available from

  `<depot location>/install_doc/<order number>/soi.html`
- The complete list of every product in your software order is available at

  `<depot location>/install_doc/<order number>/ordersummary.html`
- For more information, see Installation Note 39379: *The SAS Software Depot: Frequently Asked Questions* at

  `http://support.sas.com/kb/39/379.html`

✓ **The SAS installation data (SID) file or files on your media are valid for a limited time.**

- If your installation process fails because the SID file has expired, your SAS Site Representative should contact SAS for a new SID file.

REVIEW CRITICAL DOCUMENTATION

✓ If you have not reviewed them yet, refer to the System Requirements.

- To search for system requirements documentation for SAS Foundation and the other products in your order, use the Quick Links listed here:
  `http://support.sas.com/documentation/installcenter/94/index.html`
- Third-party reference information is available from Third Party Software Requirements,
  `http://support.sas.com/resources/thirdpartysupport/`
- Later steps in this *QuickStart Guide* address requirements that are described in the following locations:
  - the checklist that is included with the Deployment Plan
  - in your SAS Software Depot in `<depot location>`/install_doc/`<order number>`/ReadmeFiles

✓ 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/techsup/notes/v8/5/055.html`).
- For UNIX, the installer account must be a `sas` account that has a home directory and requires a password for authentication.
  - The `sas` account must have a umask of 022.
  - If you use the *root* account, your deployment will fail.

✓ For more information about deployment, see the *SAS 9.4 Intelligence Platform: Installation and Configuration Guide, Second Edition*.

- The guide offers an introduction to management of a SAS deployment:
  `http://support.sas.com/documentation/cdl/en/biig/69172/HTML/default/viewer.htm`

✓ If you are migrating a planned deployment from SAS 9.2 or SAS 9.3, you must prepare your software for migration to SAS 9.4.

- To prepare, follow the instructions in the *SAS 9.4 Intelligence Platform Migration Guide*, located at
  `http://support.sas.com/documentation/cdl/en/bimig/63853/HTML/default/titlepage.htm`

✓ **If you have an existing SAS 9.4 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`

✓ **For mount commands for UNIX, refer to the *SAS Deployment Wizard and SAS Deployment Manager 9.4: User's Guide.***

- The *Guide* can be found on Install Center:
`http://support.sas.com/documentation/installcenter/en/ikdeploywizug/66034/PDF/default/user.pdf`

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 directory (for example, `C:\Program Files\SAS`) and configuration directories. Follow your site's established backup procedures.
- Back up your metadata. Refer to the "Backing Up and Restoring Your SAS Content" section of the *System Administration Guide*. The guide is on the Product Documentation website for SAS Intelligence Platform: `http://support.sas.com/94administration`

2 **To create your SAS Software Depot, use the SAS Deployment Wizard on your media.**

- Before you start the wizard, review the alert-level deployment issues described here: `http://support.sas.com/94installalerts`
- Your software and documentation are in the SAS Software Depot.
  - For Windows, double-click the `setup.exe` at the root of the media to start the SAS Deployment Wizard.
    Note: You may have to right-click the `setup.exe` and select **Run as administrator**.
  - For UNIX, launch `setup.sh` from the UNIX command line, from any directory other than the removable media's file system. Do not launch the SAS Deployment Wizard via the File Manager.
- After the SAS Deployment Wizard starts, select **Create or Add to a SAS Software Depot** and follow the instructions in the dialogs.

3 Update your SAS Software Depot with critical hot fixes.

- Start the SAS Deployment Wizard.
  - For Windows, double-click the `setup.exe` file at the root of the SAS Software Depot folder.
  - For UNIX, execute the `setup.sh` file at the root of the SAS Software Depot directory.
- In the Select Deployment Task dialog, select **Manage this SAS Software Depot**.
- Select **Retrieve Hot Fixes** to download the latest hot fixes. The SAS Deployment Wizard then downloads all appropriate SAS hot fixes to the depot.
- Repeat this step for each software order in the depot.

4 Complete each pre-installation checklist appropriate for your software order or orders.

- Standard deployment plans with checklists are available in Install Center, `http://www.sas.com/installcenter/plans`
- 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.

5 Follow the supplemental instructions for deploying SAS software.

- If your order contains alternate or supplemental instructions for certain products, they are in product readme files located in your SAS Software Depot:
  `<depot location>/install_doc/<order number>/ReadmeFiles`

6 To install your software order, use the SAS Deployment Wizard in your SAS Software Depot.

- The software orders 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.

7 **Follow SAS Deployment Wizard instructions
to install any updates or maintenance software.**

- 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.

8 **To start the SAS Deployment Wizard,
use setup.exe.**

- Follow the method appropriate for the host where the software will
  be installed:
  - For Windows, double-click the setup.exe at the root of
    your SAS Software Depot.
    Note: You may have to right-click the setup.exe and
    select **Run as administrator**.
  - For UNIX, execute setup.sh at the root of the SAS Software
    Depot.
- Use the dialogs to install and configure your software. For more
  information about the choices available in each dialog, use the
  Help button.
- For information about the SAS Deployment Wizard console mode
  text-based interface or for other assistance, consult the
  *SAS Deployment Wizard and SAS Deployment Manager 9.4:
  User's Guide* available from this location on Install Center:
  http://support.sas.com/documentation/installcenter/en/
  ikdeploywizug/66034/PDF/default/user.pdf

9 **Additional steps may be required
for your deployment.**

- If you applied updates to an existing deployment,
  follow the additional post-update steps that are available from
  http://support.sas.com/software/updates
- For UNIX, three files located in the !SASROOT/utilities/bin
  directory must be setuid root. For details, see
  http://support.sas.com/kb/15/231.html
- Visit Install Center and review each appropriate host *Configuration
  Guide* for any product-specific post-installation steps:
  http://support.sas.com/documentation/installcenter

SECURITY ISSUES AND SAS HOT FIXES

- Visit our Security Bulletin site regularly to review current security issues:
  `http://support.sas.com/security/alerts.html`

- For the hot fixes available for your deployment, SAS also recommends regular use of the SAS Hot Fix Analysis, Download and Deployment Tool,
  `http://ftp.sas.com/techsup/download/hotfix/HF2/SASHFADD.html`

SAS NOTES

- For the latest installation news, visit this site for Alert Notes:
  `http://support.sas.com/94installalerts`

- For general SAS 9.4 information, visit this site for the *SAS 9.4 FAQ*:
  `http://support.sas.com/kb/49/516.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. For contact information, see
      `http://support.sas.com/techsup/contact/index.html`

- Before you call, 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.