

# Deployment Guide

## SAS/IML<sup>®</sup> Studio 3.3

### Overview of SAS/IML Studio Installation

SAS/IML Studio is a Microsoft Windows client application that connects to SAS<sup>®</sup> Workspace Servers. SAS/IML Studio must be installed on a computer that runs one of the following Microsoft Windows versions:

**Table 1: Microsoft Windows Versions Supported by SAS/IML Studio 3.3**

Operating System	32/64-bit	Editions	Service Pack
Windows 7	64-bit (x64)	Enterprise, Professional, Ultimate	
Windows 7	32-bit	Enterprise, Professional, Ultimate	
Windows Server 2008 R2	64-bit (x64)		
Windows Server 2008	64-bit (x64)		
Windows Server 2008	32-bit		
Windows Vista	64-bit (x64)	Enterprise, Business, Ultimate	
Windows Vista	32-bit	Enterprise, Business, Ultimate	
Windows Server 2003	64-bit (x64)		SP1
Windows Server 2003	32-bit		SP1
Windows XP	64-bit (x64)	Professional	SP2
Windows XP	32-bit	Professional	SP2

The SAS Workspace Servers can run on any platform that is supported by SAS 9.2.

There are two basic deployment scenarios for SAS/IML Studio:

- Install SAS/IML Studio and SAS Foundation on the same Windows computer.
- Install SAS/IML Studio on a Windows computer and SAS Foundation on a different computer.

### Installing SAS/IML Studio and SAS Foundation on the Same Computer

If SAS/IML Studio and SAS Foundation are installed on the same Windows computer, SAS/IML Studio connects automatically to the local installation of SAS Foundation by using the Microsoft Component Object Model (COM). No configuration steps are required. Within SAS/IML Studio, the local installation of SAS is referred to as My SAS Server.

As you step through the prompts that are displayed by the SAS Deployment Wizard, make the following choices:

1. On the wizard page titled **Select Deployment Type**, select **Install SAS Foundation and Related Software**.
2. On the wizard page titled **Select Products to Install**, ensure that SAS/IML Studio is selected.

## Installing SAS/IML Studio and SAS Foundation on Different Computers

### Overview

If SAS/IML Studio and SAS Foundation are to be installed on different computers, you must perform a planned deployment of your SAS software. A planned deployment enables you to install and configure all the pieces of the SAS Intelligence Platform that are necessary for SAS/IML Studio to access a SAS Workspace Server.

**Note:** Continue following these SAS/IML Studio guidelines if SAS/IML Studio is the only product in your SAS software order that requires the installation and configuration of the SAS Intelligence Platform. If your SAS software order contains other SAS products that also require a planned deployment, you should follow the deployment instructions for those other products in preference over this SAS/IML Studio deployment guide. The reason for this advice is that SAS/IML Studio has very basic requirements that will be met by the installation of any other software that requires an installation of the SAS Intelligence Platform.

**Note:** *Before proceeding with a planned deployment, you should familiarize yourself with the SAS 9.2 Intelligence Platform: Installation and Configuration Guide, located at <http://support.sas.com/documentation/cdl/en/biig/60946/HTML/default/viewer.htm>.*

The remainder of this section describes the four tasks you must perform to install and configure your SAS software:

1. Install and configure SAS software on the server computer.
2. Add user identities to the SAS Metadata Server.
3. Install SAS/IML Studio on the client computer.
4. Connect SAS/IML Studio to the SAS Metadata Server.

### Install and Configure SAS Software on the Server Computer

Use the SAS Deployment Wizard to install and configure your SAS software on the server computer. As you step through the prompts that are displayed by the wizard, make the following choices:

1. On the wizard page titled **Select Deployment Type**, select **Perform a Planned Deployment**.
2. On the wizard page titled **Specify Deployment Plan**, select **Select a standard deployment plan**; then select **SAS/IML Studio, two machines** from the list.

3. On the wizard page titled **Select Products to Install**, select **Server**.
4. On the wizard page titled **Select Configuration Prompting Level**, it is recommended that you select **Express**. The Express path through the remaining wizard prompts is faster and simpler. However, you might want to select the **Typical** path if either of the following conditions apply:
  - Your server computer is running Microsoft Windows and you would like to enable Integrated Windows authentication.
  - You want to customize settings such as server names or port numbers.

For information about Integrated Windows authentication and security issues, see the *SAS 9.2 Intelligence Platform: Security Administration Guide*, located at <http://support.sas.com/documentation/cdl/en/bisecag/61133/HTML/default/viewer.htm>.

## **Add User Identities to the SAS Metadata Server**

You need to add user identities to the SAS Metadata Server unless both the client computer and the server computer are running Microsoft Windows and you enable Integrated Windows authentication. For information about user accounts, user groups, and security issues, see the *SAS 9.2 Intelligence Platform: Security Administration Guide*. You should use the SAS Management Console to add user identities to the SAS Metadata Server. It is recommended that you create a separate user identity in the SAS Metadata Server for each user of SAS/IML Studio. For further information, see the *SAS 9.2 Management Console: Guide to Users and Permissions*, located at <http://support.sas.com/documentation/cdl/en/mcsecug/61708/HTML/default/titlpage.htm>.

You should consider using SAS Management Console to create a private data library for each user of SAS/IML Studio. SAS/IML Studio users often want a library in which they can store data that can be accessed by the SAS Workspace Server and that persists from one session to the next. By default, SAS Workspace Servers are configured so that the SASUSER library is read-only, which means that users cannot store their data in this traditional location.

**Important:** To appear in SAS/IML Studio, a library defined in metadata must be configured as a pre-assigned library. If a library is not pre-assigned, it will not appear in SAS/IML Studio, although the library can still be used in a program by using the metadata LIBNAME engine.

For information about data management, see the *SAS 9.2 Intelligence Platform: Data Administration Guide*, located at <http://support.sas.com/documentation/cdl/en/bidsag/61236/HTML/default/titlpage.htm>.

## **Install SAS/IML Studio on the Client Computer**

Use the SAS Deployment Wizard to install SAS/IML Studio on the client computer. As you step through the prompts that are displayed by the wizard, make the following choices:

1. On the wizard page titled **Select Deployment Type**, select **Perform a Planned Deployment**.

2. On the wizard page titled **Specify Deployment Plan**, select **Select a standard deployment plan**; then select **SAS/IML Studio, two machines** from the list.
3. On the wizard page titled **Select Products to Install**, select **Clients**. Ensure that SAS/IML Studio is selected.

## Connect SAS/IML Studio to the SAS Metadata Server

Start SAS/IML Studio. When SAS/IML Studio starts for the first time, it detects that SAS Foundation is not installed on the computer and that SAS/IML Studio is not configured to connect to a SAS Metadata Server. SAS/IML Studio therefore prompts you to begin the SAS Metadata Server Connection Wizard. Follow the prompts to complete the wizard. When the wizard prompts you for credentials, enter the credentials you want this particular user to use when connecting to the SAS Metadata Server.

SAS/IML Studio stores the SAS Metadata Server connection information in two files:

oms\_serverinfo2.xml

oms\_userinfo2.xml

**Note:** SAS/IML Studio creates the file oms\_userinfo2.xml only if you check the box titled **Remember password** when you complete the SAS Metadata Server Connection Wizard.

These files are located in the user's profile, as shown in Table 2.

**Table 2: Location of Per-User Metadata Server Connection Files**

Windows XP	C:\Documents and Settings\userid\Application Data\SAS\MetadataServer
Windows Server 2003	C:\Documents and Settings\userid\Application Data\SAS\MetadataServer
Windows Vista	C:\Users\userid\AppData\Roaming\SAS\MetadataServer
Windows Server 2008	C:\Users\userid\AppData\Roaming\SAS\MetadataServer
Windows 7	C:\Users\userid\AppData\Roaming\SAS\MetadataServer

These connection files are the same files that are used by the SAS Integration Technologies Client for Windows. If you delete these two .xml files, SAS/IML Studio no longer knows how to connect to the SAS Metadata Server.

## Sharing the Metadata Server Connection File for All Users of a Computer

By default, SAS/IML Studio creates the file oms\_serverinfo2.xml in the user's profile. This means that each user must complete the SAS Metadata Server Connection Wizard and that each user has a private version of the file oms\_serverinfo2.xml.

An alternative configuration is to move the file oms\_serverinfo2.xml from the user's profile to a common location so SAS/IML Studio uses one connection file for all users. If you want to use this alternative configuration, perform the following steps:

1. Start SAS/IML Studio.
2. From the **Tools** menu, select **SAS Metadata Server Connection Wizard**.

3. Complete the wizard.  
The wizard creates the file oms\_serverinfo2.xml in the directory specified in Table 2.
4. Exit SAS/IML Studio.
5. Move (not copy) the file oms\_serverinfo2.xml to the directory shown in Table 3:

**Table 3: Location of Shared Metadata Server Connection File**

Windows XP	C:\Documents and Settings\All Users\Application Data\SAS\MetadataServer
Windows Server 2003	C:\Documents and Settings\All Users\Application Data\SAS\MetadataServer
Windows Vista	C:\ProgramData\SAS\MetadataServer
Windows Server 2008	C:\ProgramData\SAS\MetadataServer
Windows 7	C:\ProgramData\SAS\MetadataServer

## Sharing the Metadata Server Connection File for All Users of Multiple Computers

Another alternative configuration is to store the SAS Metadata Server connection information in a centralized network location rather than on the individual computers on which SAS/IML Studio is installed. To use this configuration, perform the following steps:

1. Start SAS/IML Studio.
2. From the **Tools** menu, select **SAS Metadata Server Connection Wizard**.
3. Complete the wizard. The wizard creates the file oms\_serverinfo2.xml in the directory specified in Table 2.
4. Exit SAS/IML Studio.
5. Move (not copy) the file oms\_serverinfo2.xml to the appropriate network directory.
6. Use your favorite text editor to create a plain text file named oms\_serverinfo2.xml in the directory specified in Table 3. The file should contain the following text:

```
<?xml version="1.0" standalone="no"?>
<!DOCTYPE omsconfig [<!ENTITY config SYSTEM
"NETWORK_PATH\oms_serverinfo2.xml">]>
<Redirect>
&config;
</Redirect>
```

where **NETWORK\_PATH** is the path to the network directory (for example:  
\\server\directory).

You need to perform Step 6 on each computer on which SAS/IML Studio is installed. Of course, you can simply copy the file `oms_serverinfo2.xml` from one computer to the next.

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