

# **SAS® Fair Banking 8.1 Installation Instructions**



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### **SAS® Fair Banking 8.1 Installation Instructions**

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# Chapter 1 — Introduction

## About This Document

This document explains how to install the components necessary for successfully executing and administering Version 8.1 of SAS Fair Banking. The principal audience for this document is the implementation team, which includes not only technical customer staff, but also SAS and any third-party consultants. Readers should have a basic understanding of the SAS System, relational databases, operating systems, and application servers. In addition, this document assumes that readers have administrative access to the environments in which SAS Fair Banking runs. It is recommended that users print “Worksheet” on Appendix A, page 35 and fill out their site-specific information during the installation process. Documents related to this one include the following:

- SAS Installation Manual
- Tele Atlas North America/Geographic Data Technology, Inc. (TANA/GDT) Installation Manual for Matchmaker Software Development Kit Professional.
- ArcGIS ESRI Software Documentation Library

**Note:** *All of the required software must be installed and configured before SAS Fair Banking 8.1 will be ready to run. This document provides installation instructions. Refer to the SAS Fair Banking Administration Guide for configuration details.*

## Overview of SAS Fair Banking Architecture

Generally, SAS Fair Banking contains two major “server” components that can either be installed on the same machine or split among several servers in order to distribute computing resources. The optimal configuration and distribution of these components is determined during the planning phases of a given implementation and varies across implementations. The actual installation process will vary depending on specific architectures, but in most cases the only variation is the site-specific server names and paths. The two primary components are these:

- SAS server. This contains the solution server components and acts as the database for the standard solution. Most of the requests from client applications are processed through this server. This component also manages customer-specific code used for the ETL processes.
- Java application server. This contains the Web application used for reporting, error correction, data validation, qualification processing, and some system administration.

Refer to the System Requirements document for the specifications of each hardware platform in the proposed infrastructure.

It is recommended that you take a few minutes to fill out “Appendix A — Installation Worksheet” on page 35 with your site-specific information at this time.

## ESRI License Files

When installing the mapping products from ESRI, your organization must acquire a license file to activate the software. This file can be obtained from ESRI’s Web site at <http://service.esri.com/>. You may want to acquire the license file prior to performing the installation to expedite the process. You can work with your SAS consultant to request this file. Your SAS consultant can guide you through the online request form.

## SAS Technical Support

For technical support for Version 8.1 of the SAS Fair Banking Solution, your organization should contact SAS Technical Support. Questions can be submitted via the Web, e-mail, or telephone, as

shown in “Table 1 – SAS Technical Support Options.” Customers outside North America should contact their local SAS office.

Contact Method	Details
Web	<a href="http://support.sas.com/techsup/contact/submit_emits2.html">http://support.sas.com/techsup/contact/submit_emits2.html</a>
E-mail	<a href="mailto:support@sas.com">support@sas.com</a> (see <a href="http://www.sas.com/service/techsup/contact/emits.html">http://www.sas.com/service/techsup/contact/emits.html</a> for information on the format required for submitting a problem through e-mail).
Telephone	919-677-8008 (see <a href="http://www.sas.com/service/techsup/contact/telephone_support.html">http://www.sas.com/service/techsup/contact/telephone_support.html</a> for information required before calling).

**Table 1 – SAS Technical Support Options**

For complete information on our technical support policies, as well as for information on how to access our e-mail, fax, and mail support, please visit <http://support.sas.com/techsup/support.html>.

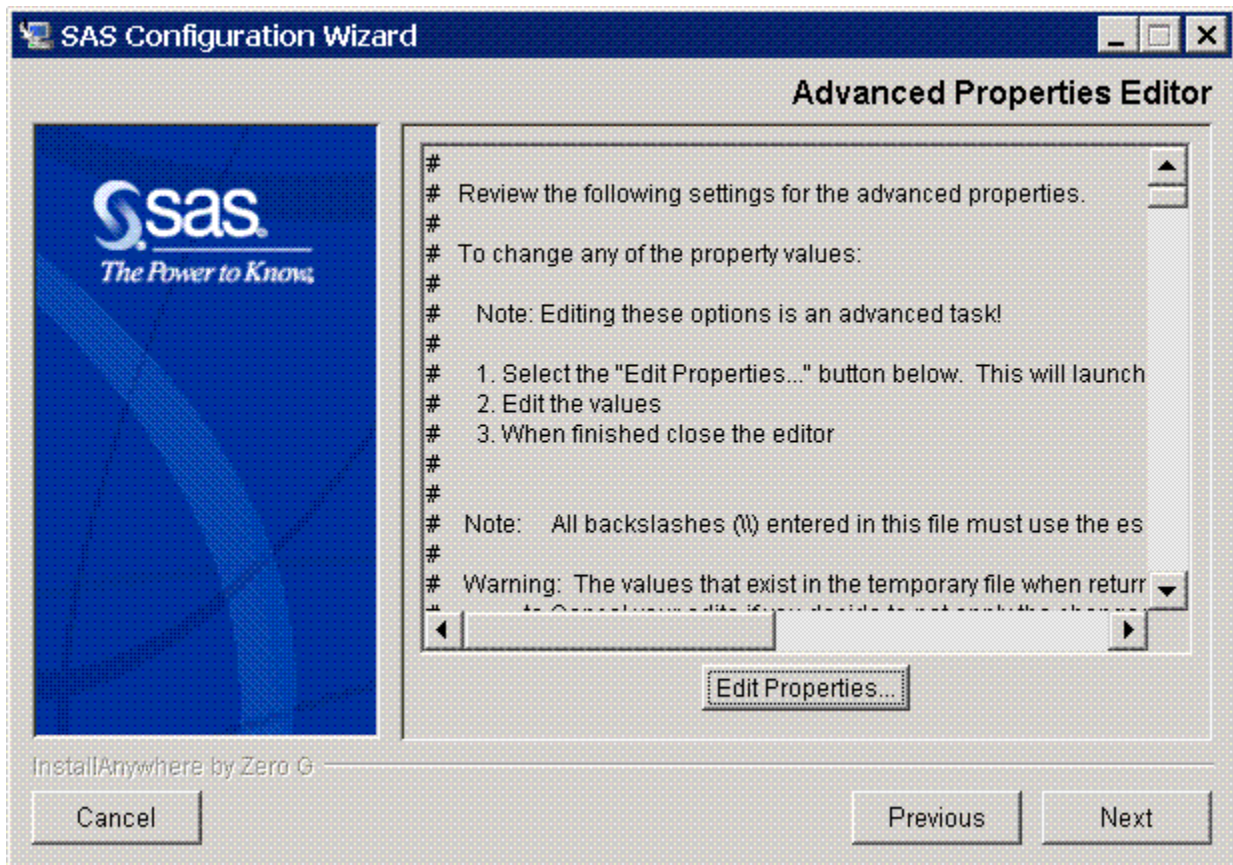
## Chapter 2 — Installation of SAS Software

Refer to the installation guide provided with your SAS CDs for comprehensive instructions on installing the core SAS System and SAS Fair Banking.

Note the installation paths and list of hotfixes in “Appendix A — Installation Worksheet” on page 35.

When you get to the **Advanced Properties Editor** screen, you will need to specify properties used by SAS Fair Banking.

Click the **Edit Properties** button to bring up a text editor with the properties.



### For Windows OS

You will need to change the following (located near the bottom of the file):

- EMAILHOST = (the IP address of your SMTP mail server machine)
- EMAILID = (the user ID of your SAS Fair Banking administrator)
- EMAILPW = (remove emailpw and leave this blank)
- EMAILAUTHPROTOCOL = NONE
- SFB\_GEO\_PATH = c:\mmsdkpro (or wherever you installed GDT)

- `PATH_TO_WZZIP = c:\\Program Files\\Winzip\\wzip` (should be the full path to the executable itself, not the directory that contains this).
- `PROXY_SERVER =` (the full URL of your proxy server, for external web access)

## For UNIX OS

You will need to change the following (located near the bottom of the file):

- `EMAILHOST =` (the IP address of your SMTP mail server machine)
- `EMAILID =` (the user ID of your SAS Fair Banking administrator)
- `EMAILPW =` (remove emailpw and leave this blank)
- `EMAILAUTHPROTOCOL = NONE`
- `SFB_GEO_PATH =` (remove value and leave this blank)
- `PATH_TO_WZZIP =` (remove value and leave this blank)
- `DATAFLUXSERVICE = SFBFairBanking_AddressVerify_Geocoding`
- `DATAFLUXHOST =` (the IP address of your DataFlux server machine)
- `PROXY_SERVER =` (the full URL of your proxy server, for external Web access)

## Special Instructions for WebLogic 8.1 SP6 Installations

When SAS Fair Banking is deployed on WebLogic 8.1 SP6, the following error may occur

```
java.lang.ClassCastException  
at antlr.CharScanner.makeToken(CharScanner.java:175)
```

Please refer to SAS Note 19133, available at <http://support.sas.com/kb/19/133.html>, for information on resolving this error.



## Chapter 3 — Installation of Geocoding Software

Your SAS Fair Banking package will have included one of two options for enabling the solutions' internal geocoding functionality. Determine which software you received and follow the appropriate directions below.

### ***GDT Matchmaker Professional***

Matchmaker is typically installed in the `C:\mmsdkpro` directory at your organization.

The installation steps for Matchmaker are contained in the `readme.txt` file on the **Matchmaker SDK Professional** DVD. After completing the installation steps, the `usgeo.dll` and `usattr.dll` files must be copied to the SAS root directory—typically `C:\Program Files\SAS\SAS 9.1`.

To install the GDT software and data, follow these steps:

1. Install the GDT software.
  - a. Insert the disk entitled **Matchmaker SDK Professional** into your DVD drive.
  - b. Open a command prompt window.
  - c. Set the drive letter to the DVD device (for example, `D:`).
  - d. Assuming you want to install the software on the `C:` drive, run the following command:  
`INSTALL C API`
2. Install the GDT data files.
  - a. Run the following command: `INSTALL C ACGUS1`
  - b. Run the following command: `INSTALL C ACGUS2`
  - c. Run the following command: `INSTALL C Z4US`
3. Copy the DLLs to the SAS root directory:
  - a. Locate the DLLs from the GDT installation (`C:\mmsdkpro\us\api`), or wherever you installed Matchmaker. They are named `USGEO.DLL` and `USATTR.DLL`.
  - b. Copy these two DLLs to the SAS root directory—typically `C:\Program Files\SAS\SAS 9.1`.

### ***DataFlux Integration Server***

#### **A. Installation**

For **UNIX** OS:

The installation steps for DataFlux are included in the `ReadMe.txt` file on the DataFlux disk.

#### **B. Copy DataFlux Architect Service**

Once you have installed your DataFlux software, you will need to copy an architect service from your SAS Root Directory to the location where you have installed DataFlux. This architect service enables the SAS Fair Banking solution to geocode addresses.

To copy the architect service on **UNIX** OS:

1. Navigate to the `<SASHOME>/misc/hmdamva/dataflux` directory.
2. Copy the file entitled "SASFairBanking\_AddressVerify\_Geocoding.dmc" to the location where DataFlux was installed in the  
`<DataFlux_install_location>/dfpower/var/diss_arch_svc` folder.

**Note:**      *You must remove the “.dmc” extension when you do the copy – the file in di s\_arch\_svc must be named simply “SASFairBanking\_AddressVerify\_Geocoding”.*

### **C. Download the SAS DIS Connector**

The SAS DIS Connector provides additional SAS Data Quality procedures and functions that allows the execution of DataFlux Architect jobs and services on the DataFlux Integration Server. You must log in to the DataFlux Customer Care site at <http://www.dataflux.com/Customer-Care/>

to download the SAS DIS Connector. If you do not have a DataFlux customer ID, you will need to request one upon your initial visit to the DataFlux Customer Care site.

Once you have logged in, navigate to <http://www.dataflux.com/Customer-Care/Downloads/SAS/SAS-DIS-Connector-Downloads.asp> and select the download of **Version 2.0** of the SAS DIS Connector that is appropriate for your operating system.

Once you have downloaded the appropriate DIS Connector, you will need to follow the installation instructions that are contained in the tar file to complete the process.

## Chapter 4 — Installation of External Data

### *SAS Fair Banking Census Data*

Your SAS Fair Banking Package will have included a DVD labeled **SAS Fair Banking Census Data**. Locate the DVD and follow the directions below:

#### **Move the DVD Files in Windows**

1. Insert the DVD into your CD-ROM drive.
2. Open **Windows Explorer** under the **Start** menu.
3. Create or select the destination folder on your local computer where you want the information stored. To create a folder, go to **File** → **New** → **Folder**.
4. On the left side of the screen, double-click the drive labeled with the DVD's release name, and then click the appropriate folder for your language. The information stored on the DVD should appear on the right side of the screen.
5. Click to highlight the file or files that you want to move to the new location on your computer.
6. Once the files are highlighted, right-click and select the **Copy** command.
7. On the left side of the screen, locate the folder in which you want to place SAS Fair Banking Census Data. Double-click to open that folder.
8. Click on the right side of the screen to make that the active window.
9. Right-click and select the **Paste** command to move a copy of the items from the DVD to their new folder.
10. Record the path name.

#### **Move the DVD Files in UNIX**

1. Insert the DVD into your CD-ROM drive.
2. Create a destination folder on your local computer where you want the DVD files stored.
3. Copy the files from the CD-ROM drive to the temporary directory on the file system.

Example: `cp /cdrom/* /data/sas/censusdata`

**Note:** *If your UNIX machine does not have a CD-ROM mounted, you may also use FTP to transfer the files from a Windows machine to your UNIX environment.*

4. Record the path name.

### *SAS Fair Banking Peer Data*

Your SAS Fair Banking Package will have included with it a CD with documentation (**SAS Fair Banking Peer Data Documentation**) and a set of three DVDs labeled as follows:

- **SAS Fair Banking Peer Data 2004**
- **SAS Fair Banking Peer Data 2005**
- **SAS Fair Banking Peer Data 2006**

The **SAS Fair Banking Peer Data Documentation** CD includes the documentation and SAS programs required to compile the SAS datasets that use Peer Data.

Locate the **SAS Fair Banking Peer Data 2004**, **SAS Fair Banking Peer Data 2005**, and **SAS Fair Banking Peer Data 2006** DVDs and follow the directions below for **each** DVD.

**Note:** *The peer data installation may take several hours to complete; therefore, be sure to complete this installation during a timeframe when the application may be unavailable for several hours.*

### Move the DVD Files in Windows

1. Insert the DVD into your CD-ROM drive.
2. Open Windows Explorer under the **Start** menu.
3. Create or select the destination folder on your local computer where you want the information stored. To create a folder, go to **File** → **New** → **Folder**.
4. On the left side of the screen, double-click the drive labeled with the DVD's release name, and then click the appropriate folder for your language. The information stored on the DVD should appear on the right side of the screen.
5. Click to highlight the file or files that you want to move to the new location on your computer.
6. Once the files are highlighted, right-click and select the **Copy** command.
7. On the left side of the screen, locate the folder in which you want to place SAS Fair Banking Peer Data. Double-click to open that folder.
8. Click on the right side of the screen to make that the active window.
9. Right-click and select the **Paste** command to move a copy of the items from the DVD to their new folder.
10. Record the path name.

### Move the DVD Files in UNIX

1. Insert the DVD into your CD-ROM drive.
2. Create a destination folder on your local computer where you want the DVD files stored.
3. Copy the files from the CD-ROM drive to the temporary directory on the file system.  
Example: `cp /cdrom/* /data/sas/peerdata`  
**Note:** *If your UNIX machine does not have a CD-ROM mounted, you may also use FTP to transfer the files from a Windows machine to your UNIX environment.*
4. Record the path name.

Refer to the *SAS Fair Banking Administrator's Guide* for post-installation configuration instructions regarding these external data elements.

## Chapter 5 — Installing ESRI Products

### *Introduction*

To produce high quality maps, SAS Fair Banking includes ArcGIS 9 from ESRI.

SAS provides the concurrent-use version of ArcGIS 9 with SAS Fair Banking. The concurrent-use version can be used to install the product on multiple machines, and it provides additional software that governs the number of active licenses. This is known as the *License Manager*, which is a program that runs on a machine (typically a server) that is accessible on your network. The License Manager tracks the number of active users of the product. A license file is used by the License Manager to determine the number of users who can run the software at the same time.

The License Manger requires the use of a hardware key (also known as a Sentinel) to enable the software. You will receive a hardware key with your installation pack.

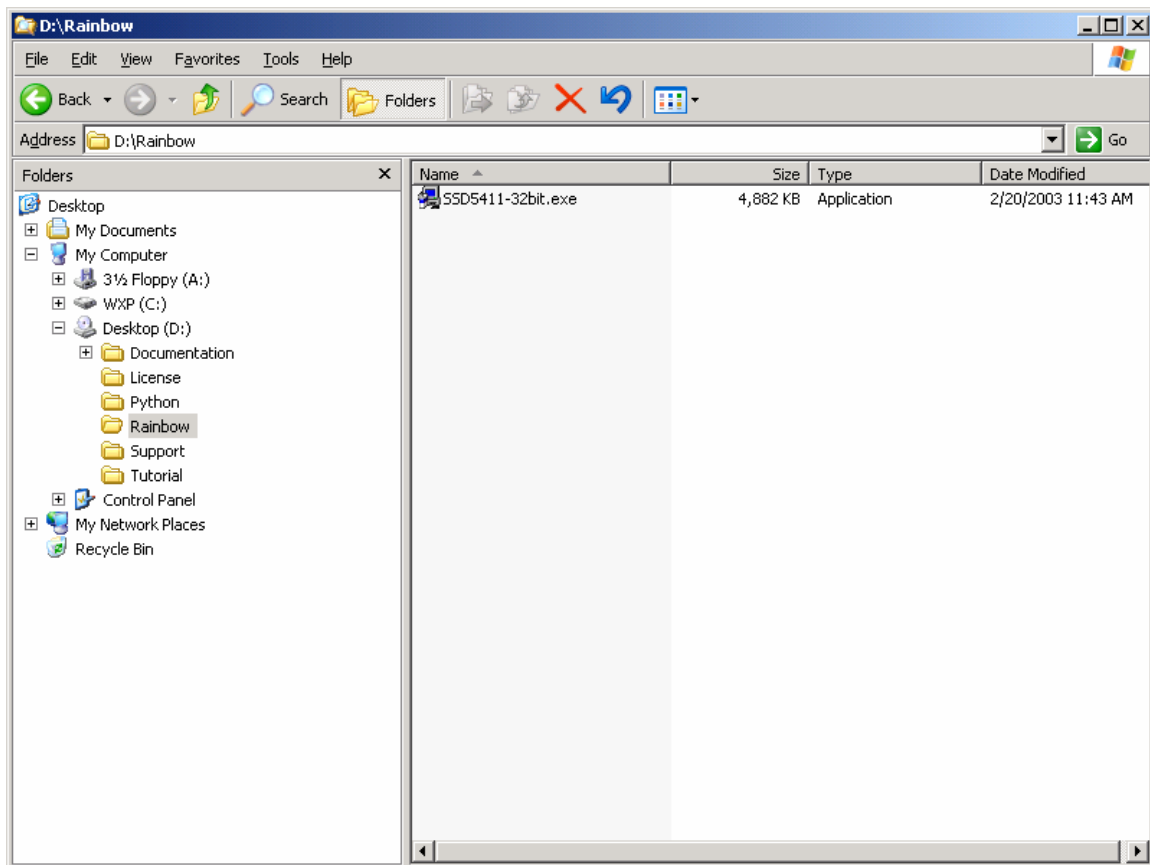
### *Concurrent-Use Installation Instructions*

#### **License File**

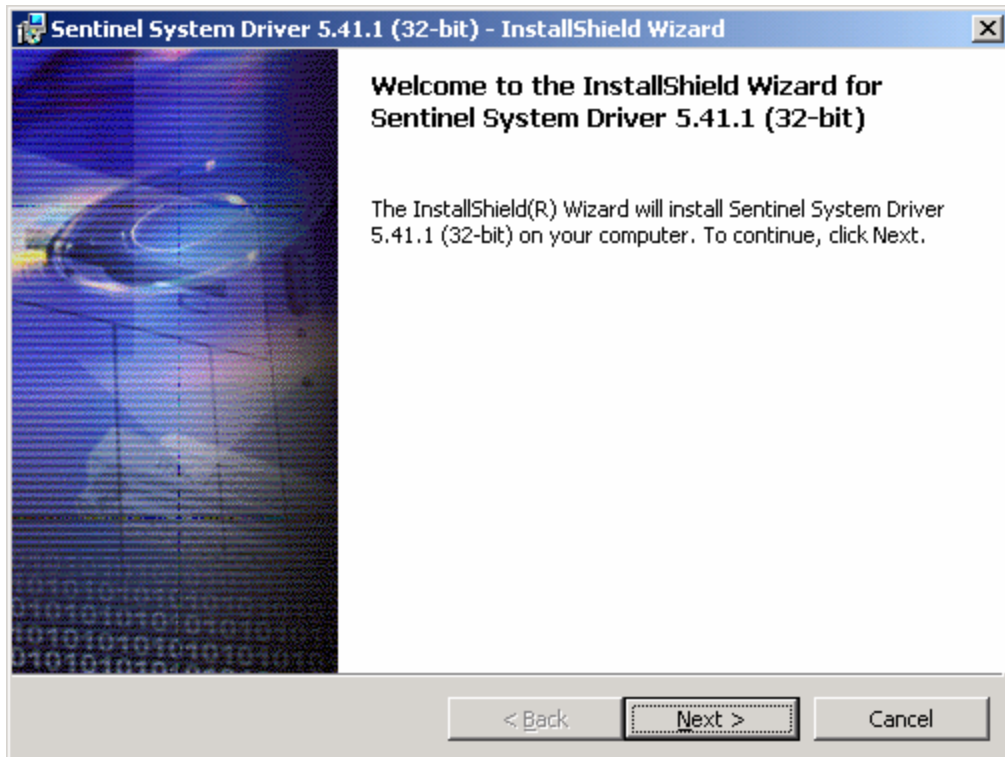
You must obtain a license file to implement this product. You may request a license file from ESRI at <http://service.esri.com>. Alternatively, you can work with your SAS implementation team to obtain this file. You will need to provide the host name of the server that will run the License Manager software. You will also need the serial number of your hardware key.

#### **Hardware Key Driver**

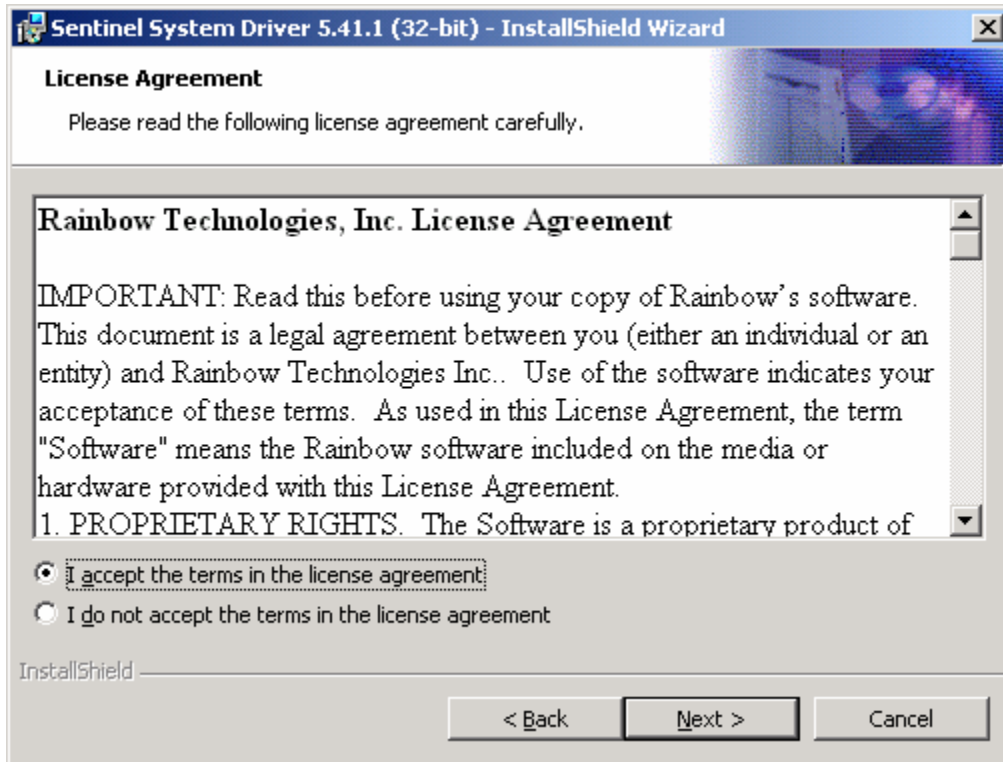
Insert the **ArcView** CD into the CD drive of a machine (typically a server) that is accessible from the user's workstations on your network. In an Explorer window, navigate to the \Rainbow directory on the CD.



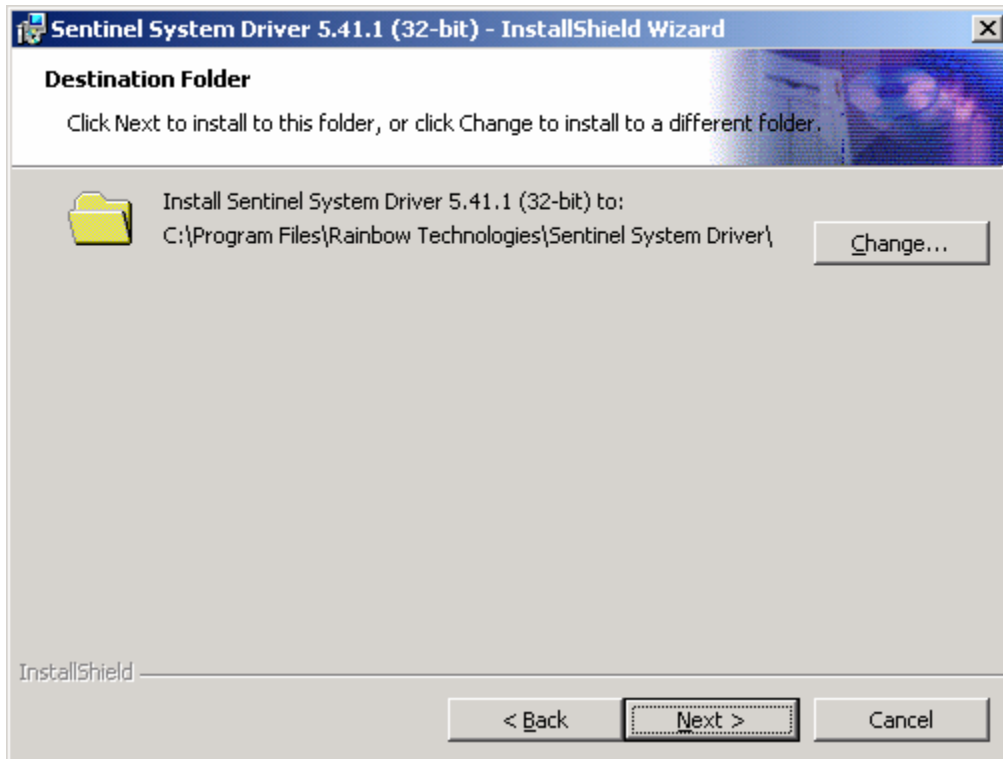
Double-click the executable file `SSD5411-32bit.exe` to install the driver. This launches an installation wizard.



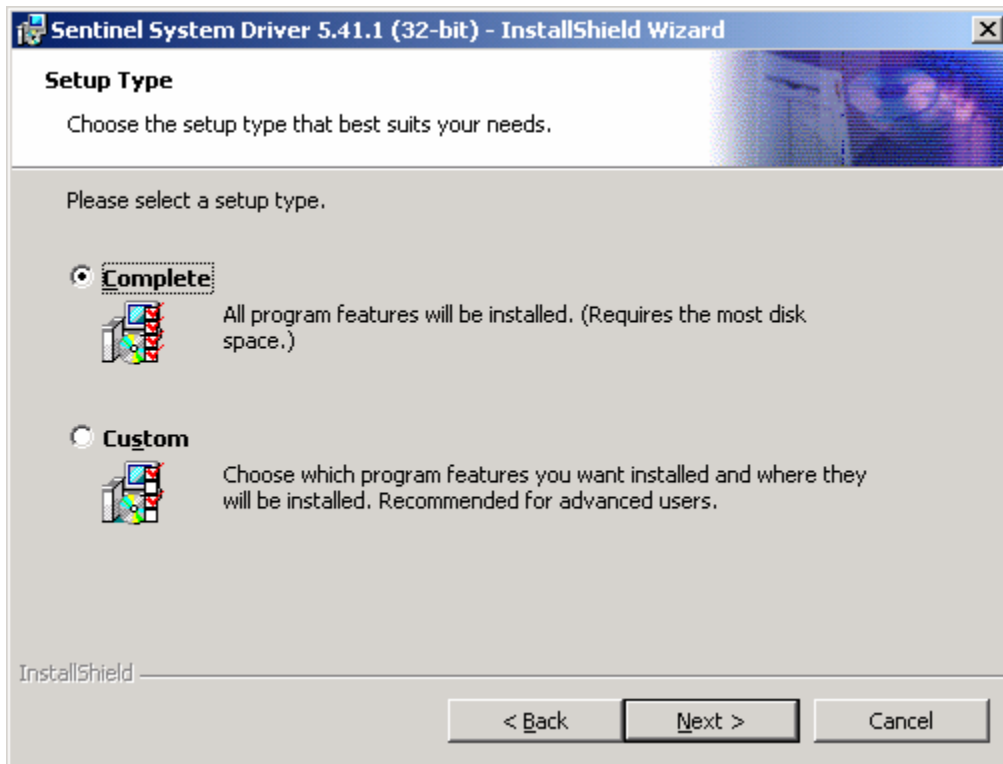
Click **Next**.



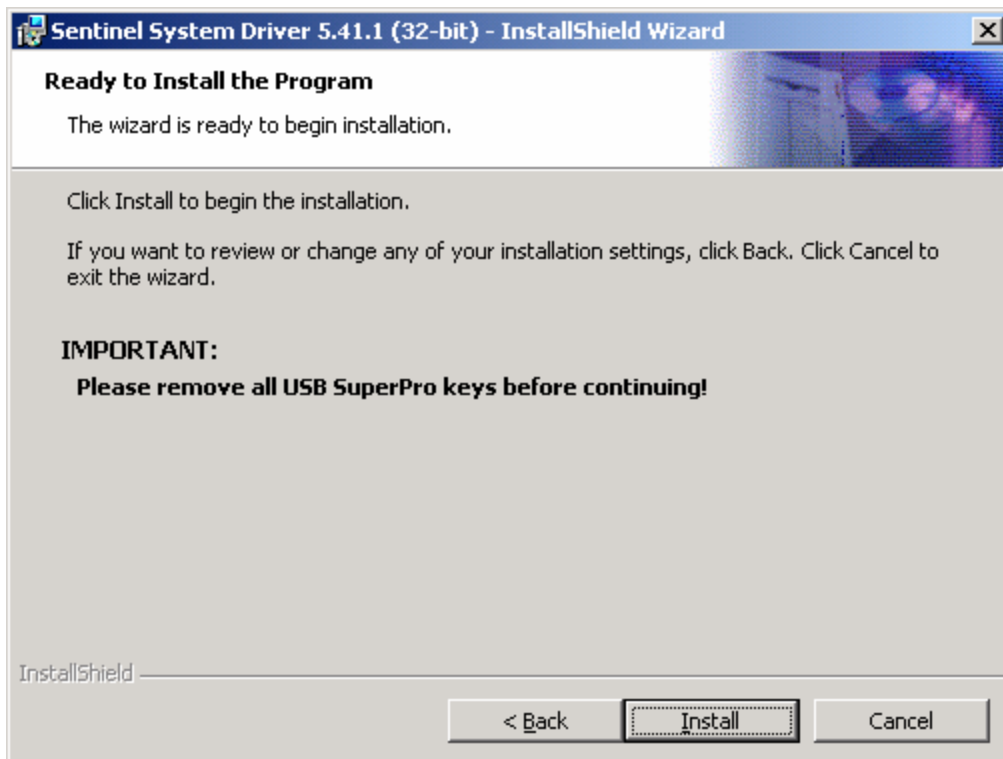
Read and accept the license agreement and then click **Next**.



Accept the default installation location or specify an alternative destination and then click **Next**.

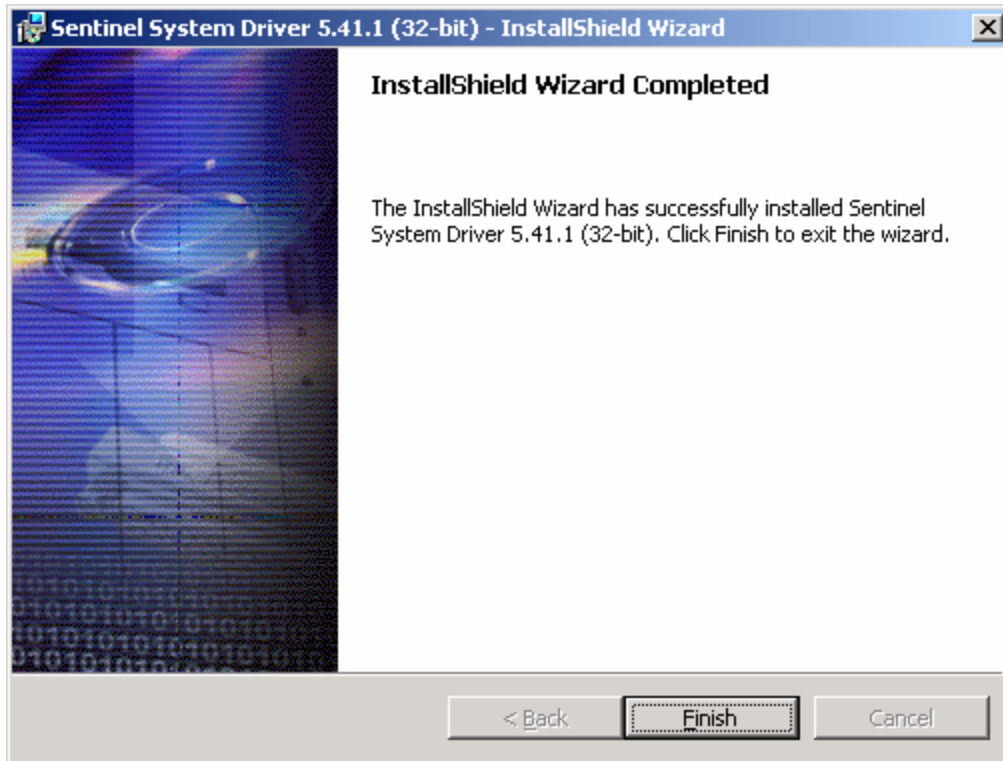


Select the **Complete** Setup Type (the default choice) and then click **Next**.





Complete the process by clicking **Install**.



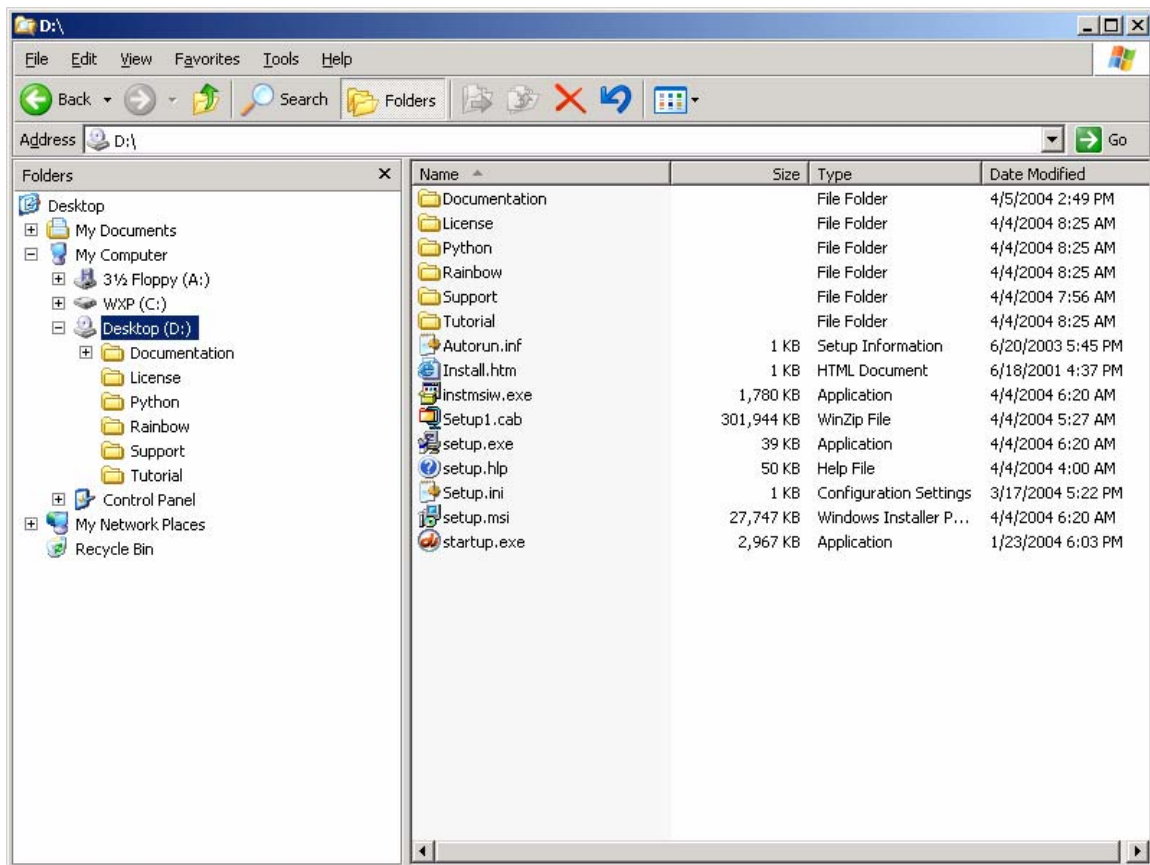
Click **Finish** to end the process.

## Hardware Key

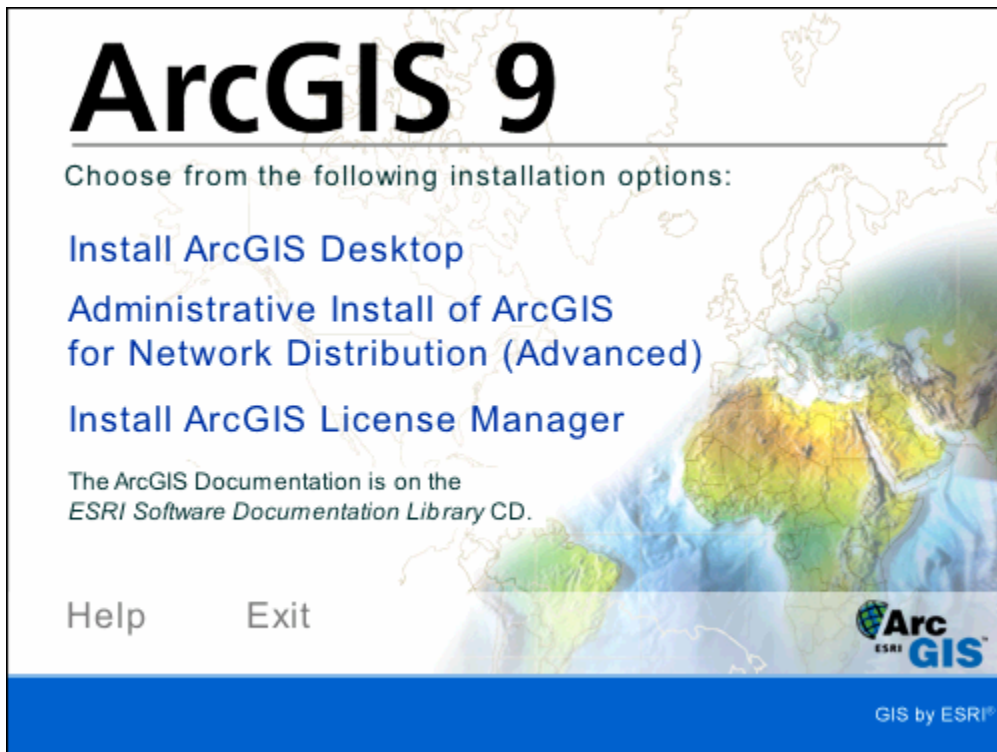
You will receive a hardware key with your installation package. Connect the hardware key to the machine where you intend to deploy the License Manager.

## License Manager

Insert the **ArcView** CD into the CD drive of the machine that will host the License Manager. In an Explorer window, navigate to the root directory on the CD.



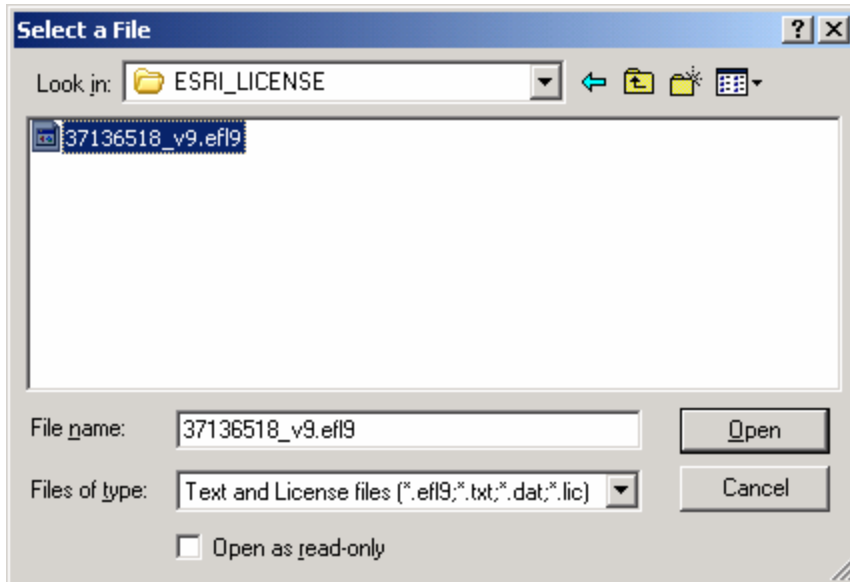
Double-click **startup.exe**.



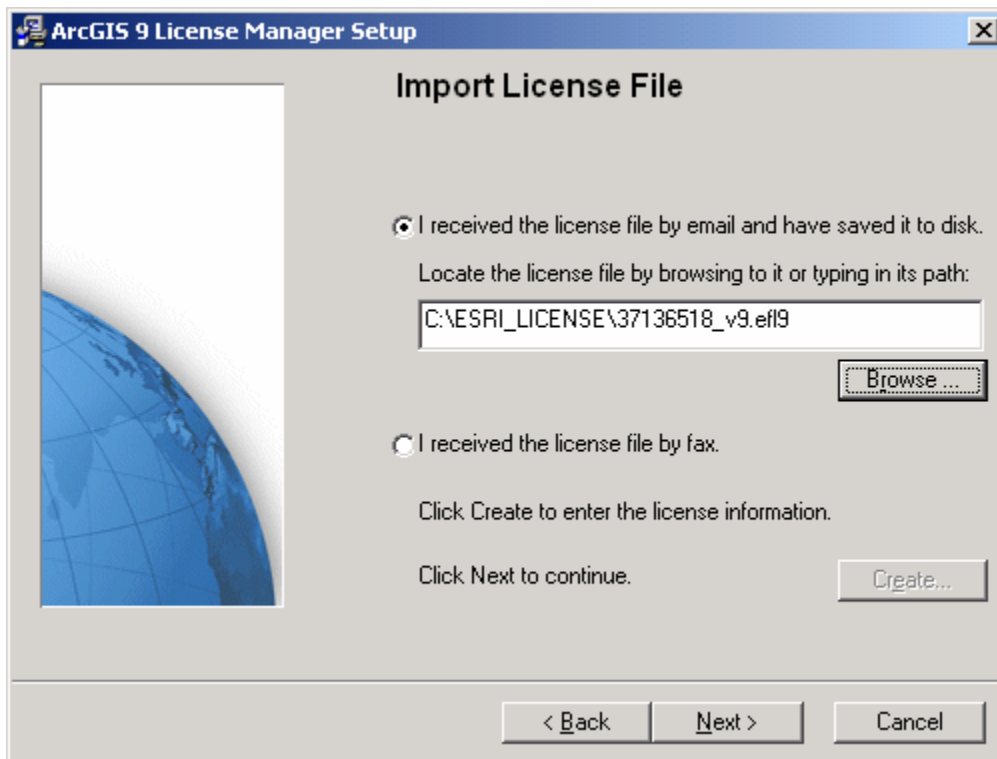
Click **Install ArcGIS License Manager**.



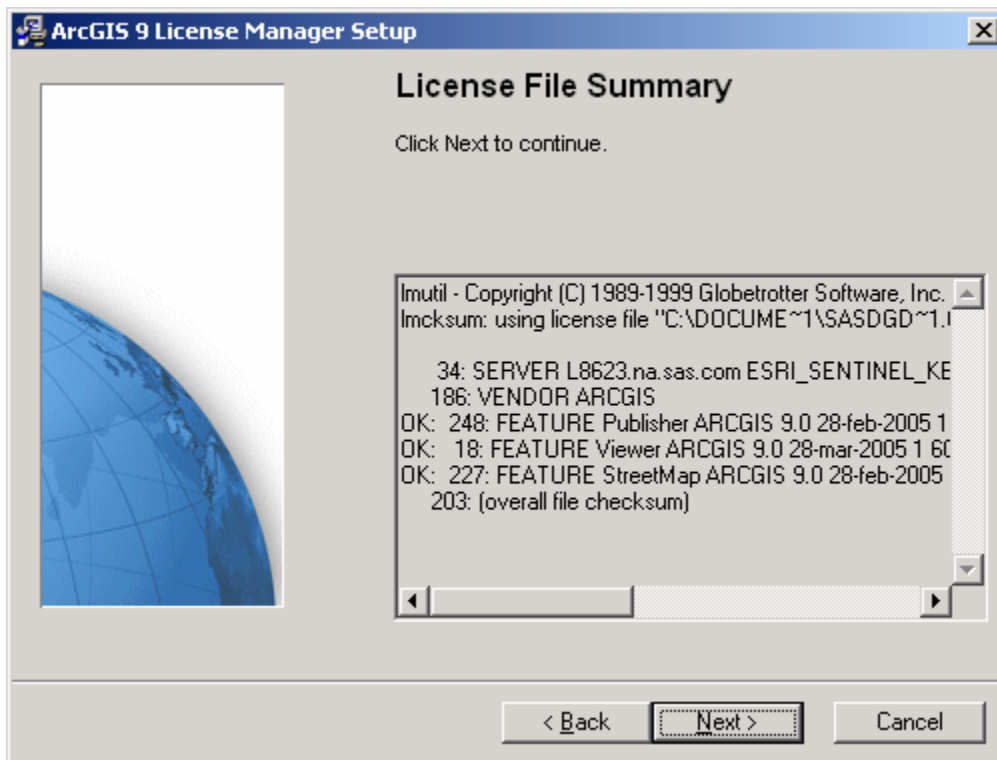
Specify the location of your license file.



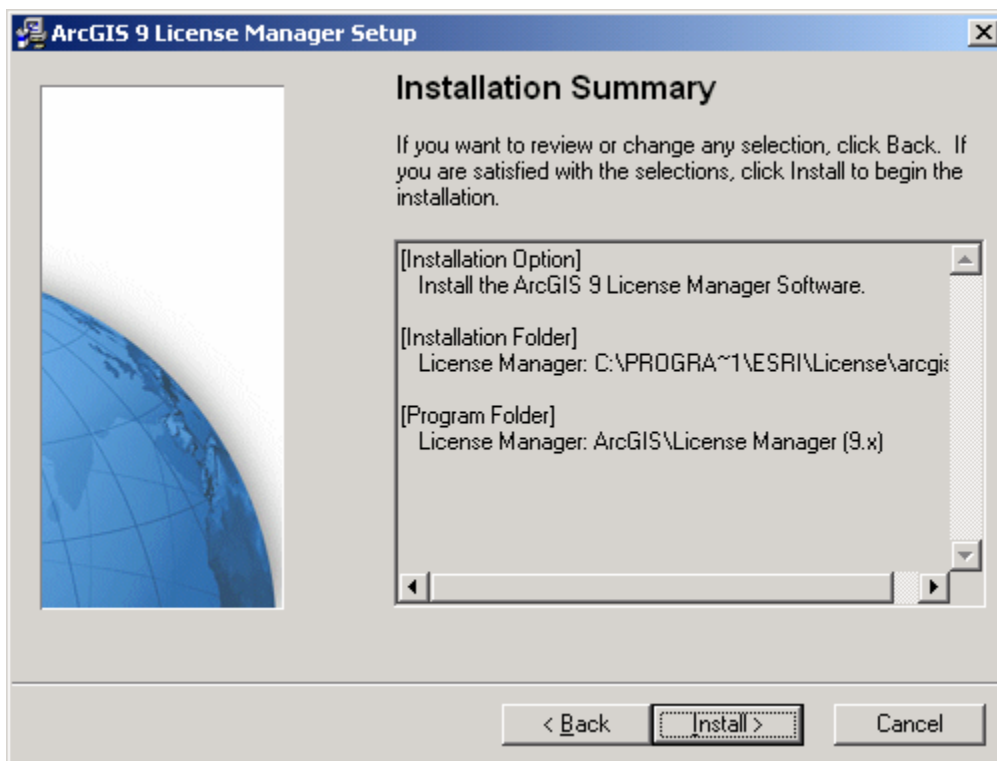
Click **Open**.



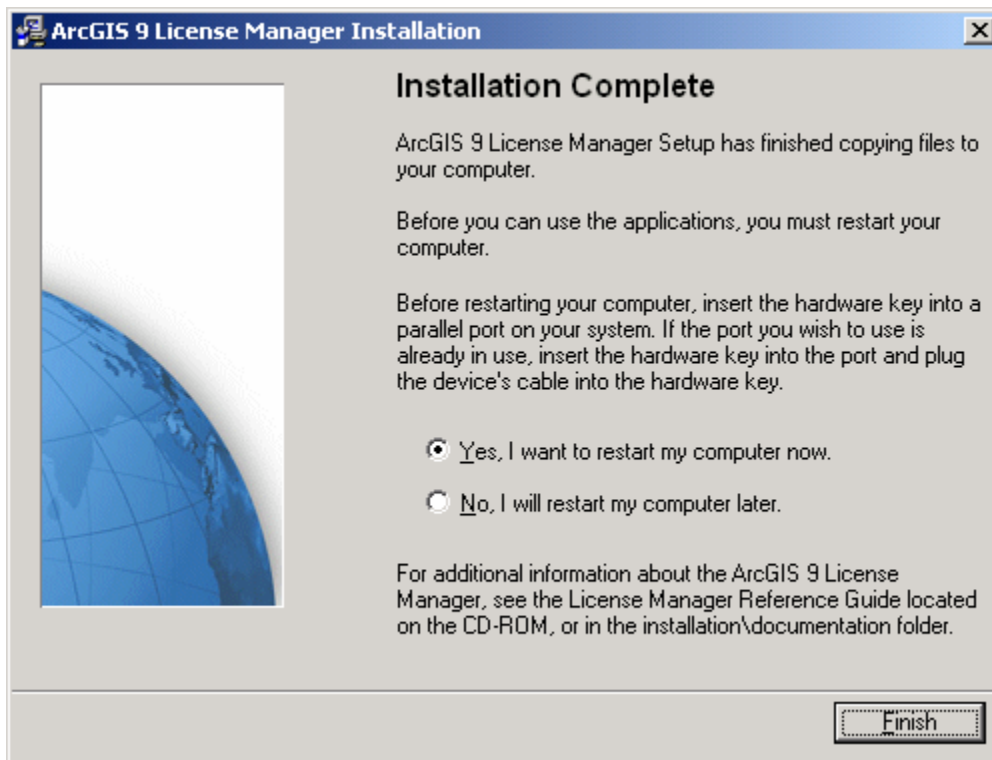
Click **Next**.



Confirm the content of the license file by clicking **Next**.



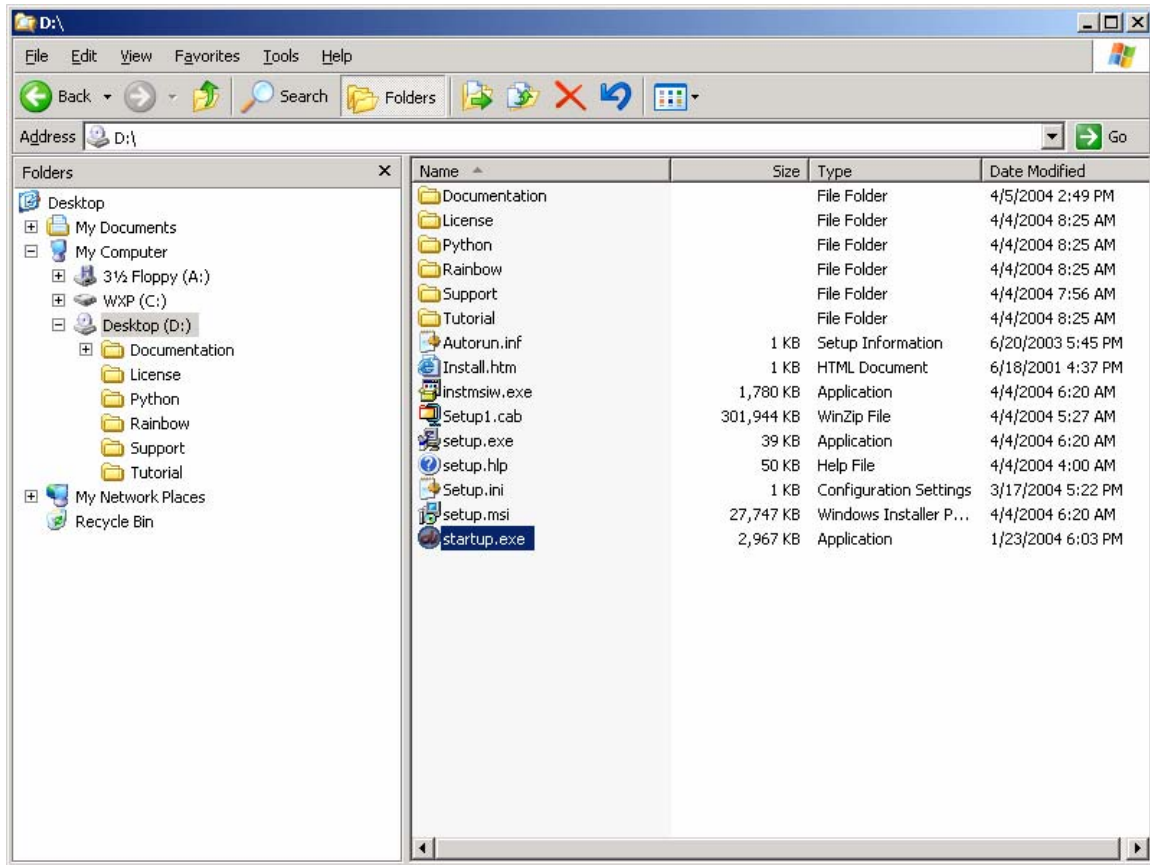
Confirm the installation summary and then click **Install**.



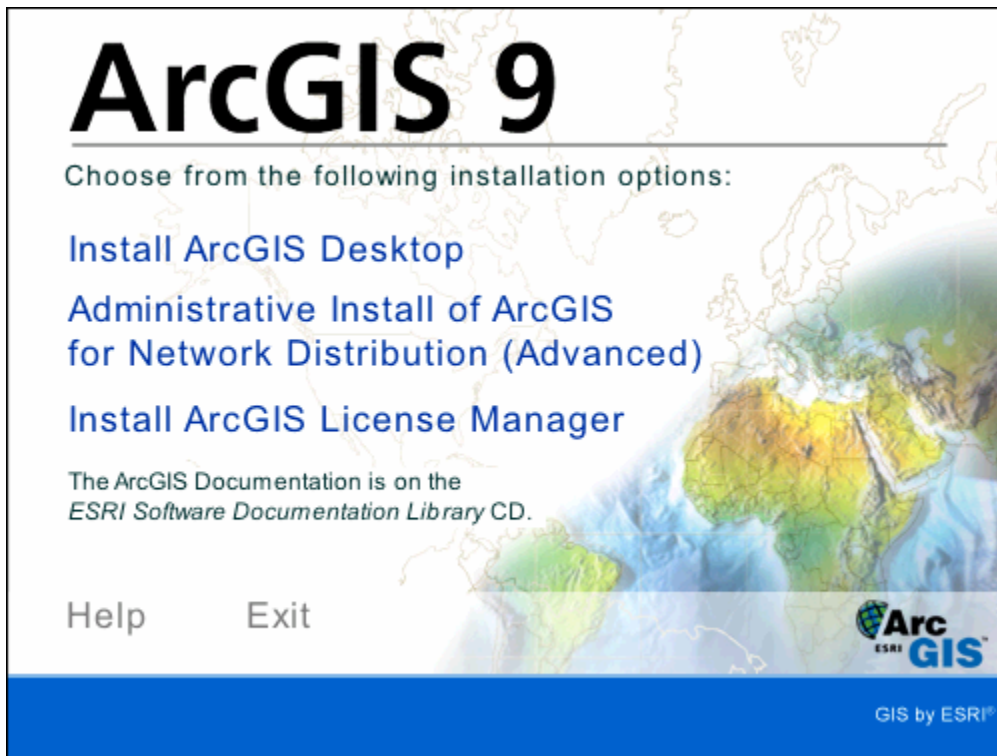
When the installation finishes, you must reboot your computer. The License Manager has been installed as a service and will start when the machine is rebooted.

## ArcGIS 9

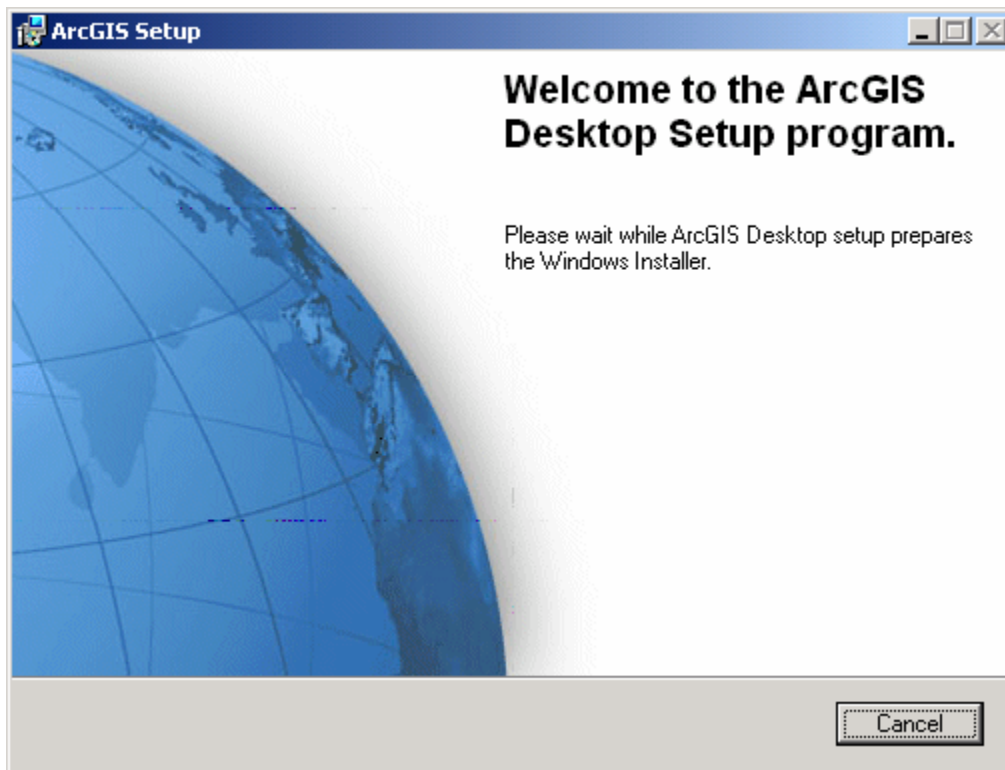
Insert the **ArcView** CD into the CD drive of the workstation of each ESRI user. In an Explorer window, navigate to the root directory on the CD.



Double-click **startup.exe**.



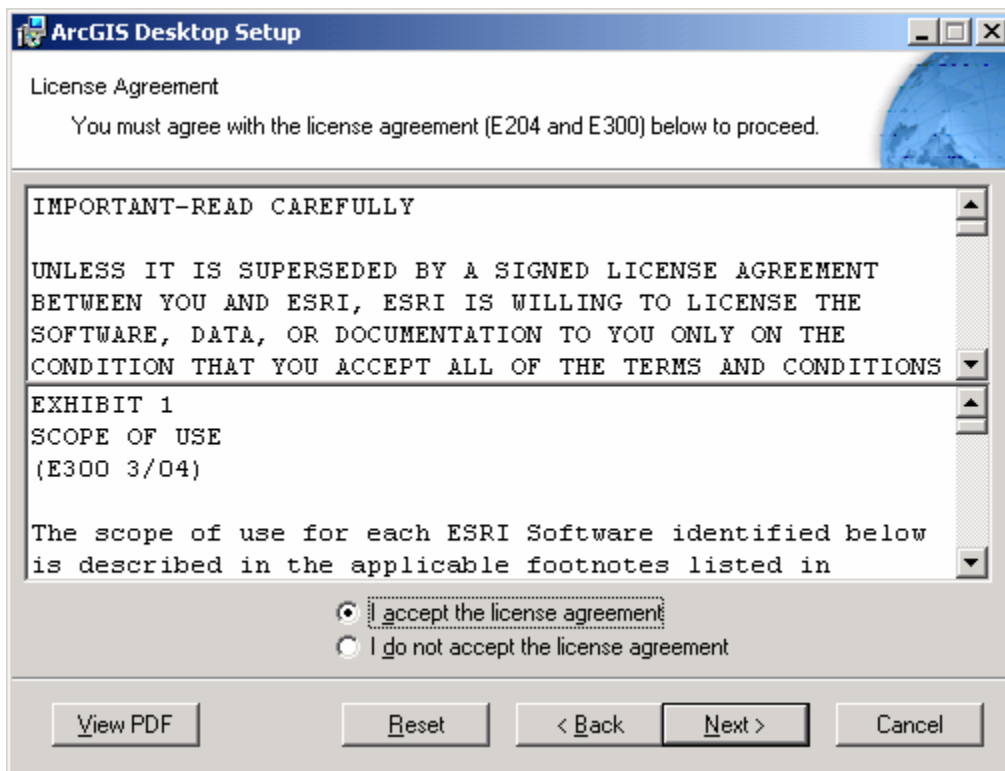
Click **Install ArcGIS Desktop**.



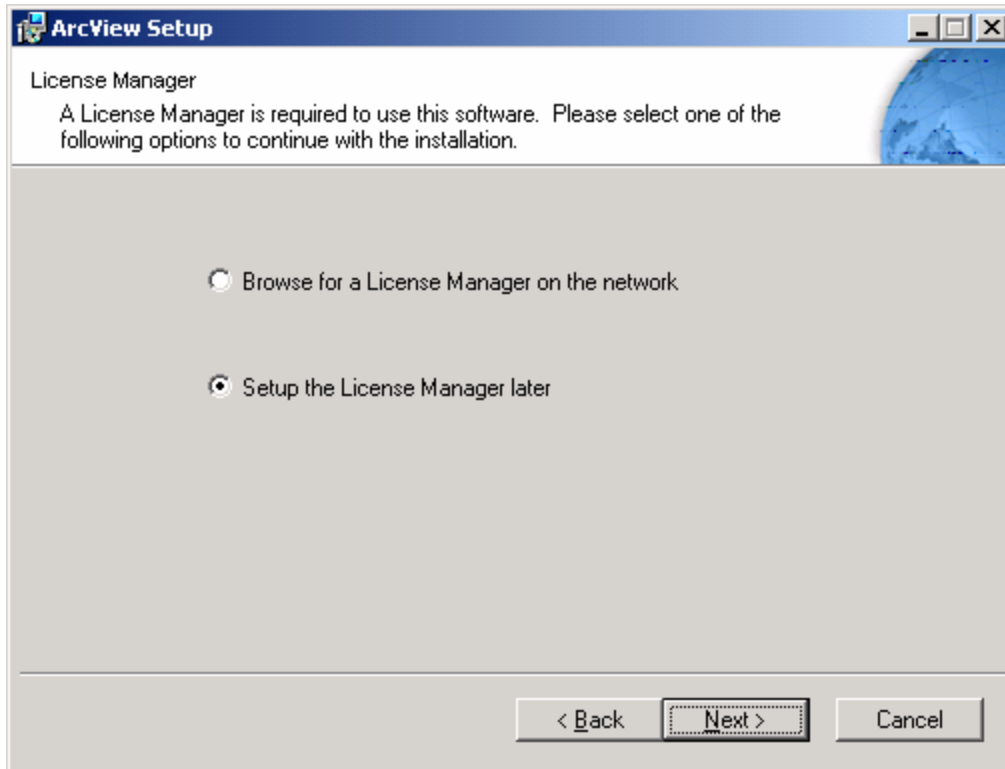




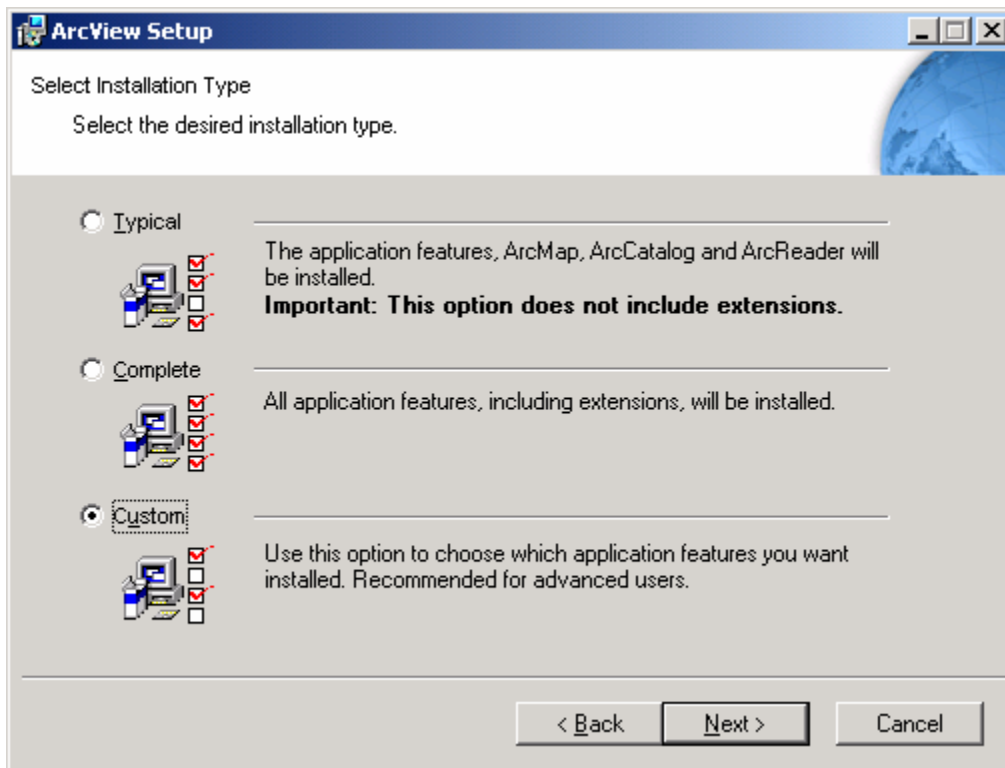
Click **Next**.



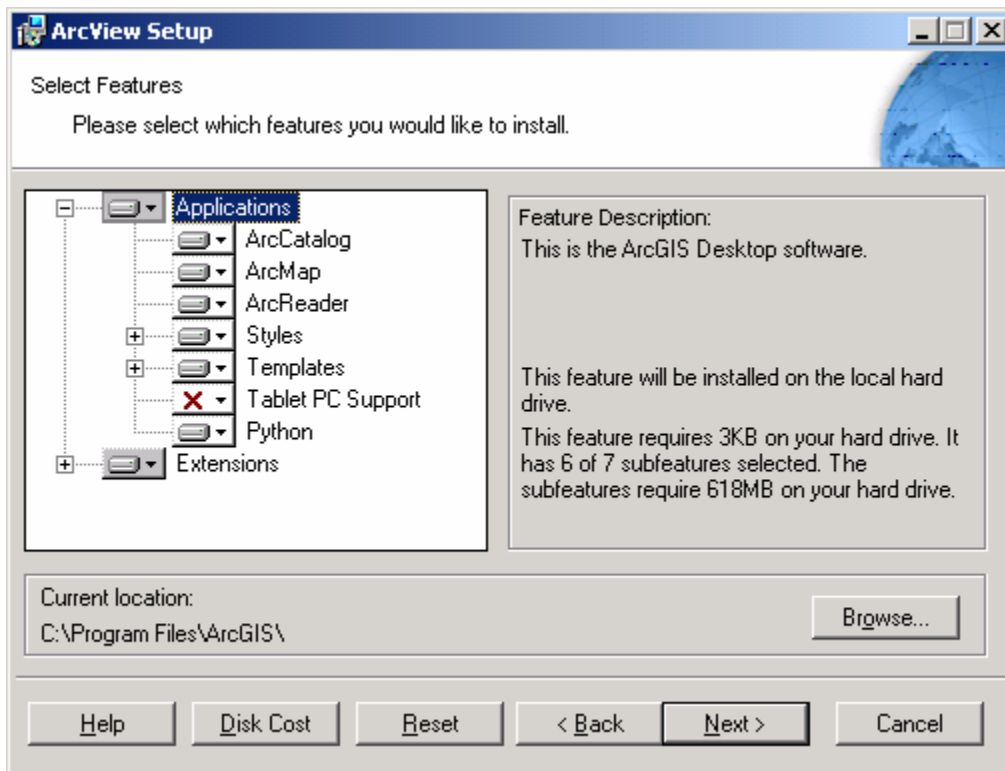
Read and accept the license agreement and then click **Next**.



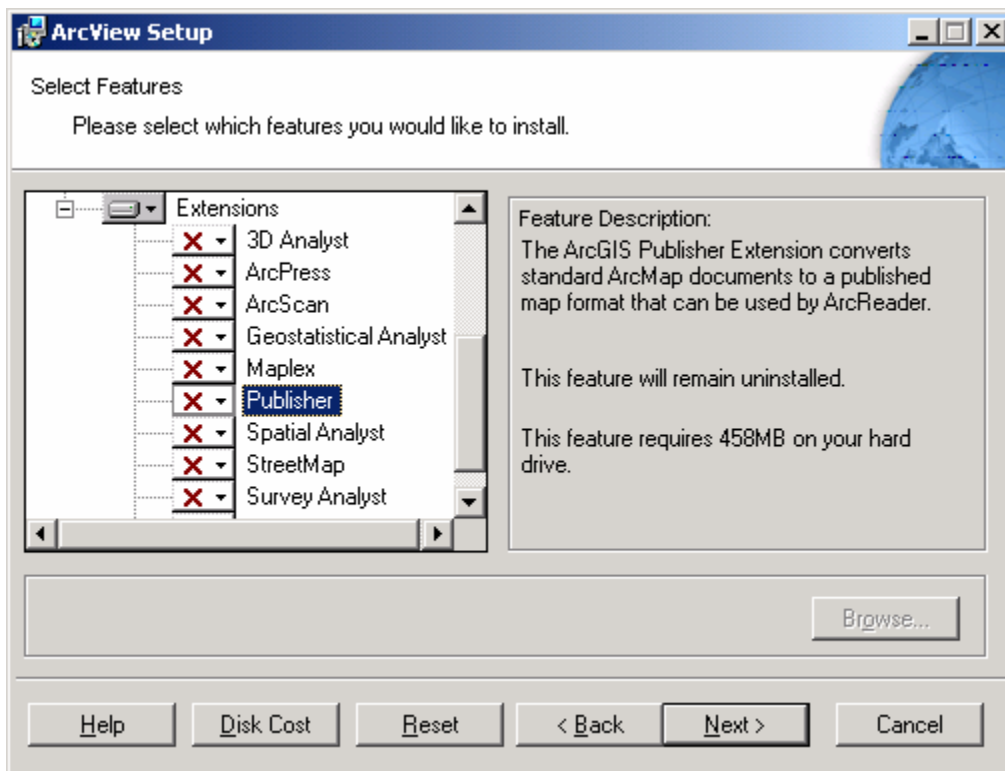
Choose **Setup the License Manager later** and then click **Next**.



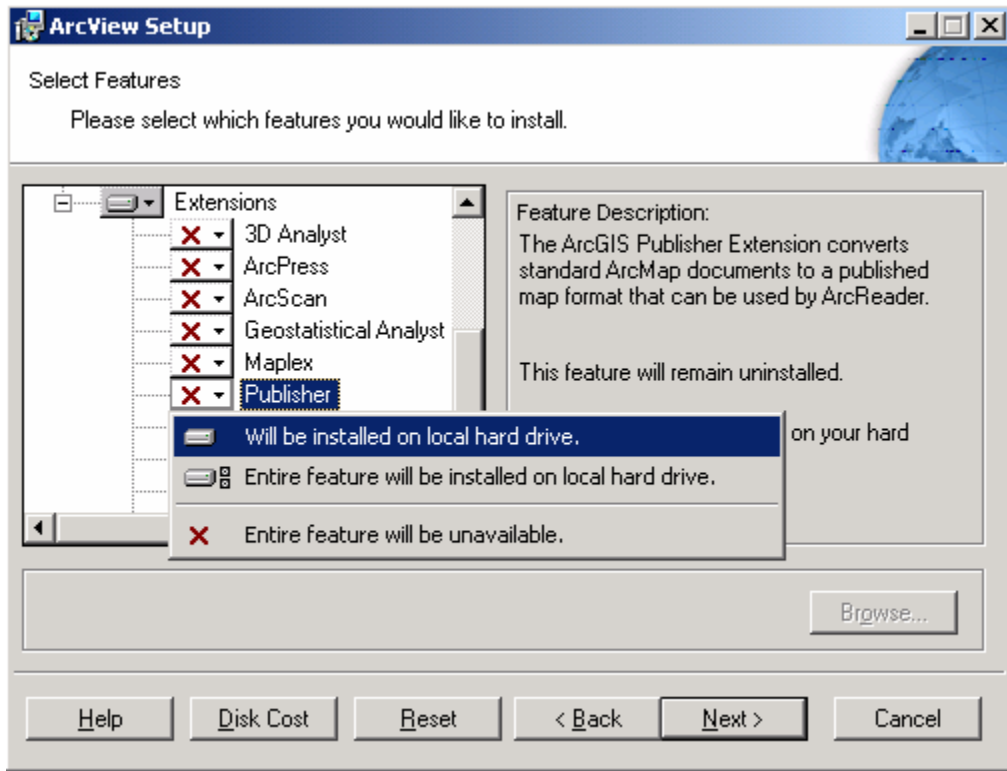
To install Publisher, select **Custom** installation and then click **Next**. If you are not installing Publisher, skip ahead to the window that discusses the Python installation.



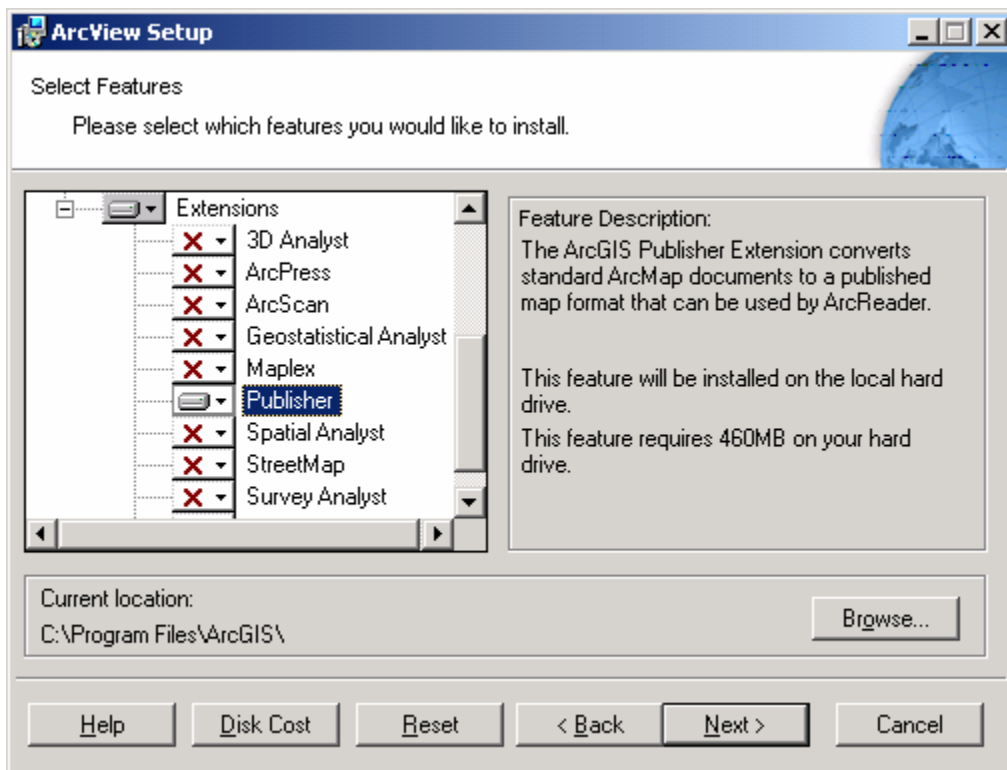
Expand the **Extensions** tree and scroll down to **Publisher**.



Click the **DOWN ARROW** key.

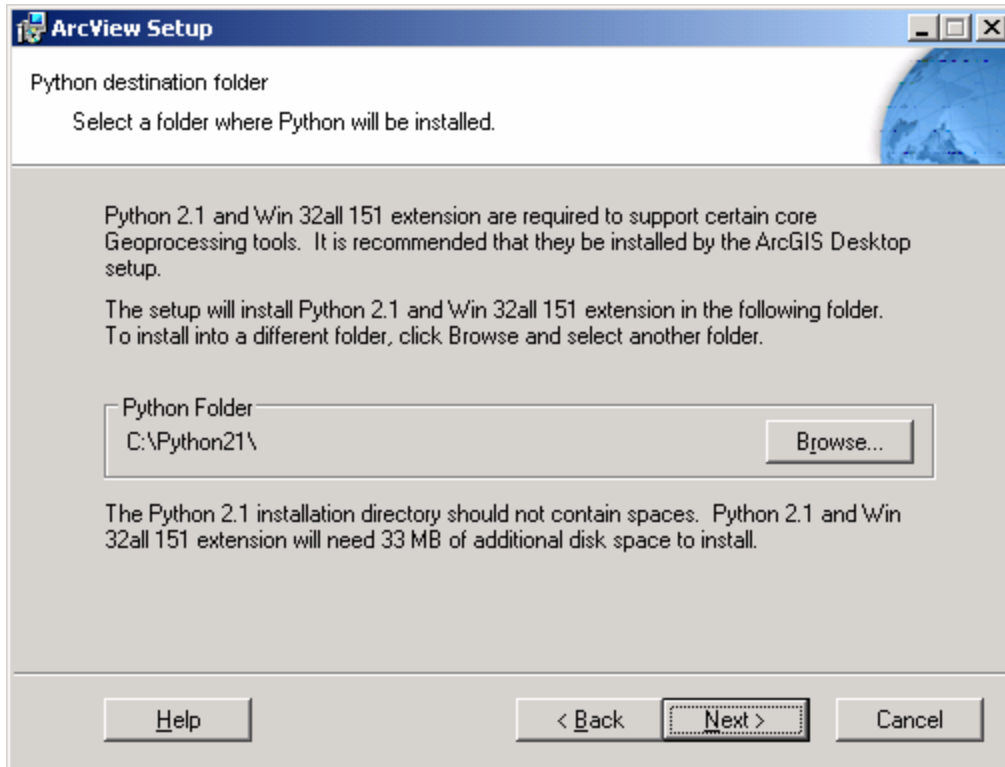


Set **Publisher** to be installed on the local drive.

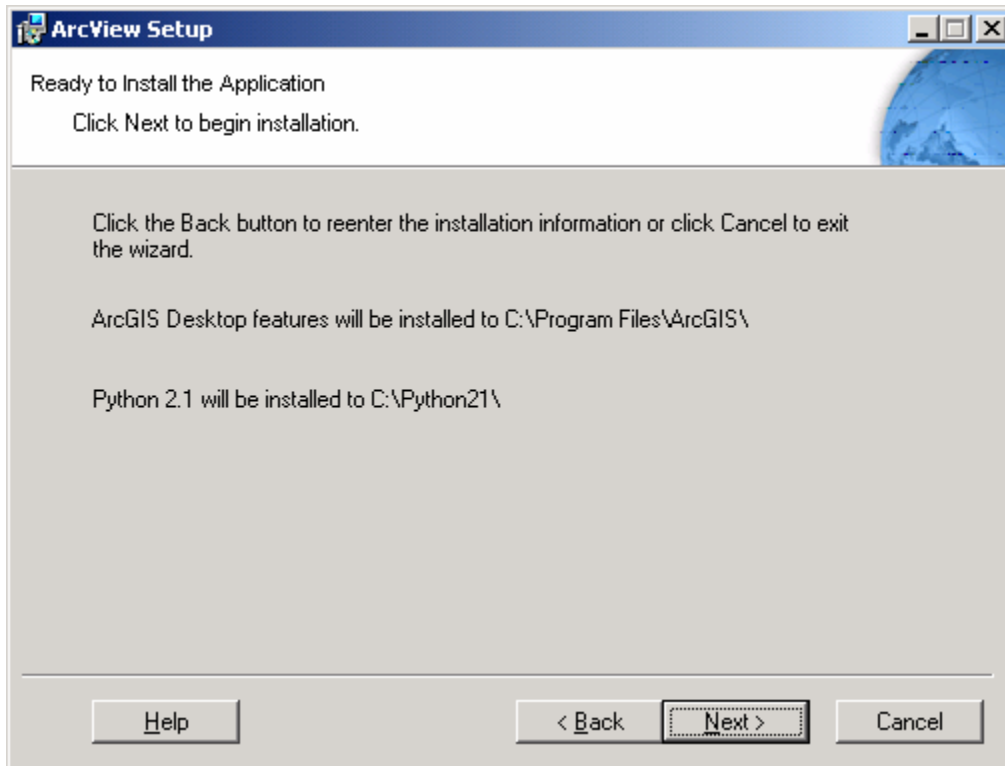


Click **Next**.

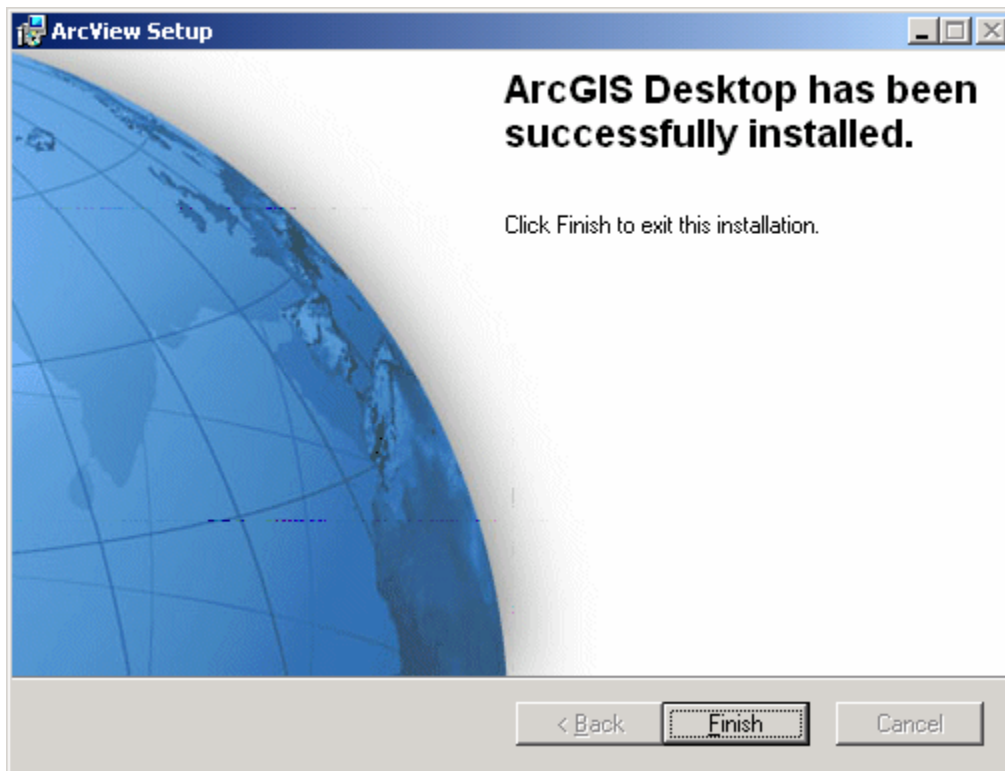
You are now prompted for a destination for Python.



Accept the location for Python or specify an alternative installation and then click **Next**.



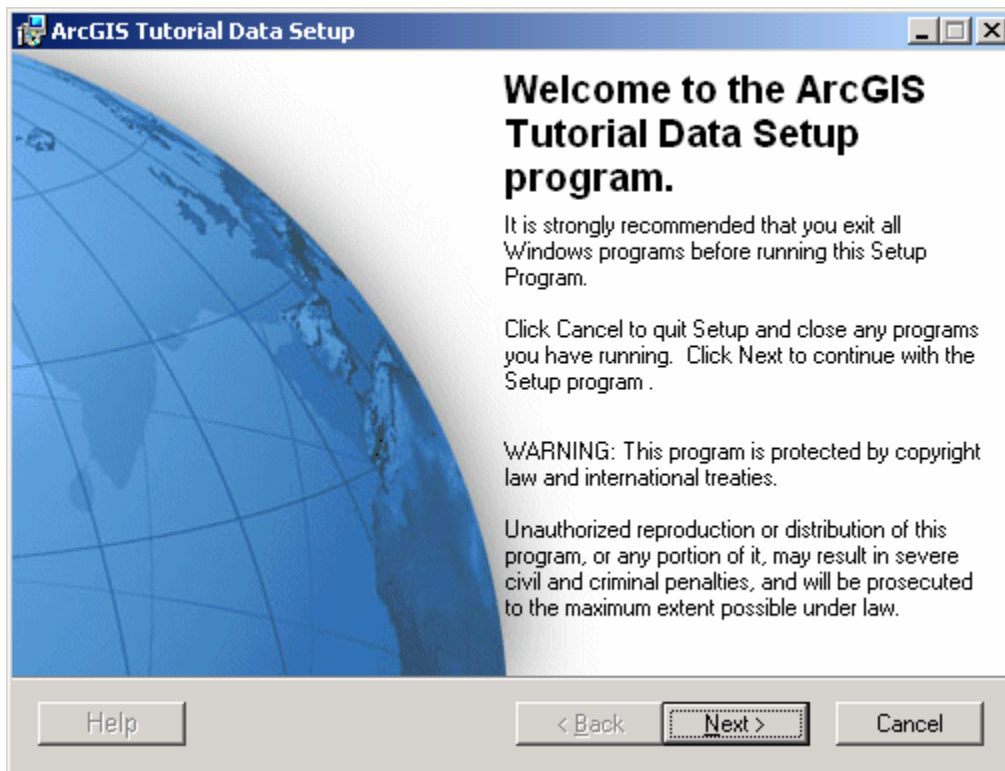
Confirm installation location and then click **Next**.



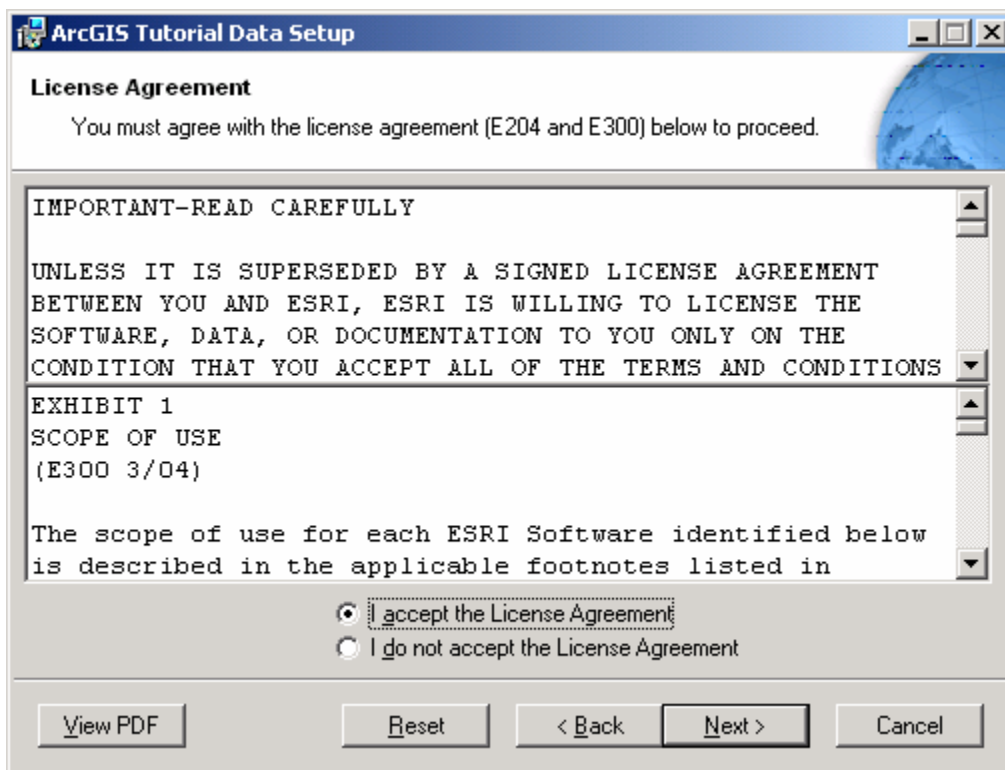
Click **Finish** to complete the installation.



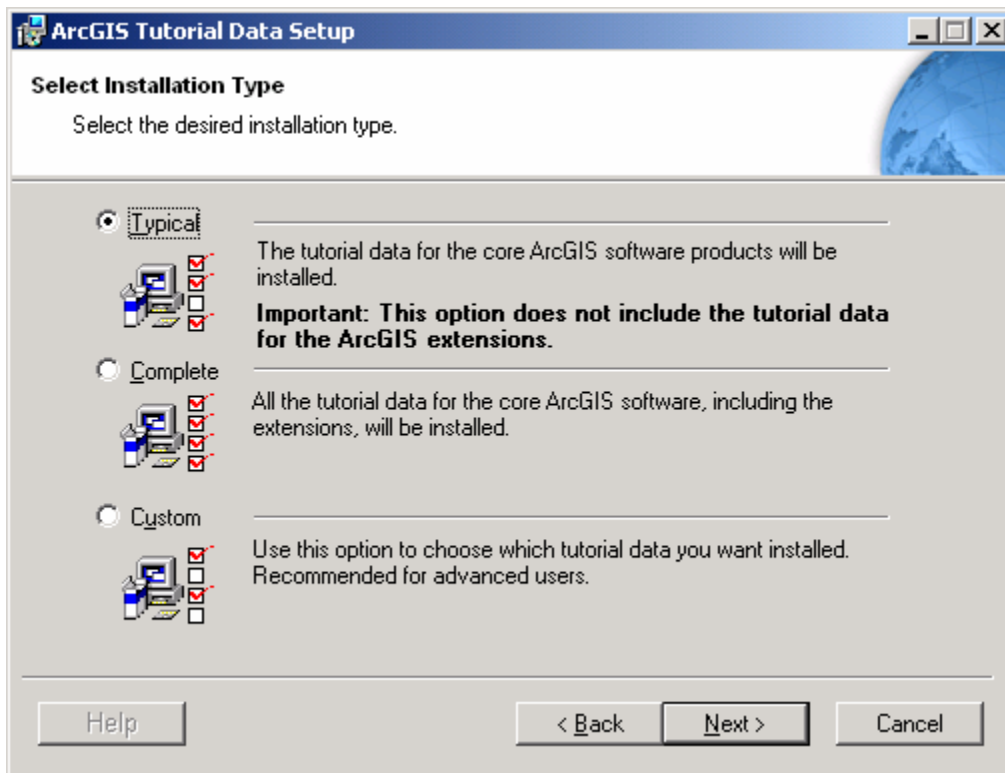
Uncheck **ArcGIS Desktop Developer Kit** and **Crystal Reports Version 9.0 for ESRI** and then click **OK**.



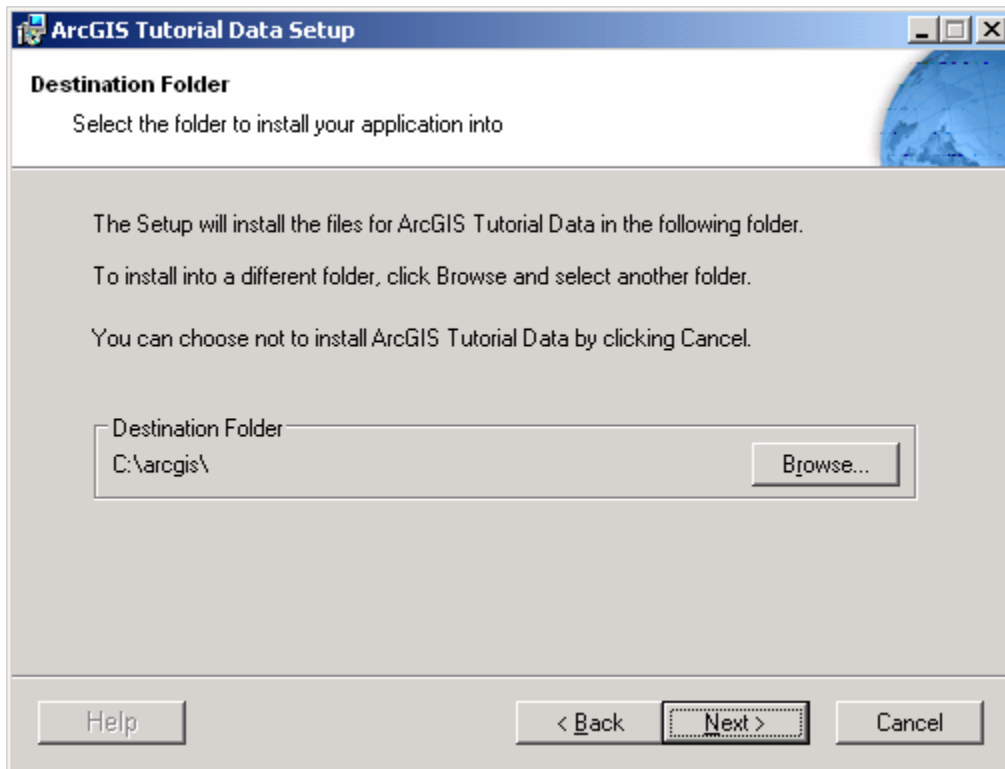
Click **Next**.



Accept the terms of the License Agreement and then click **Next**.

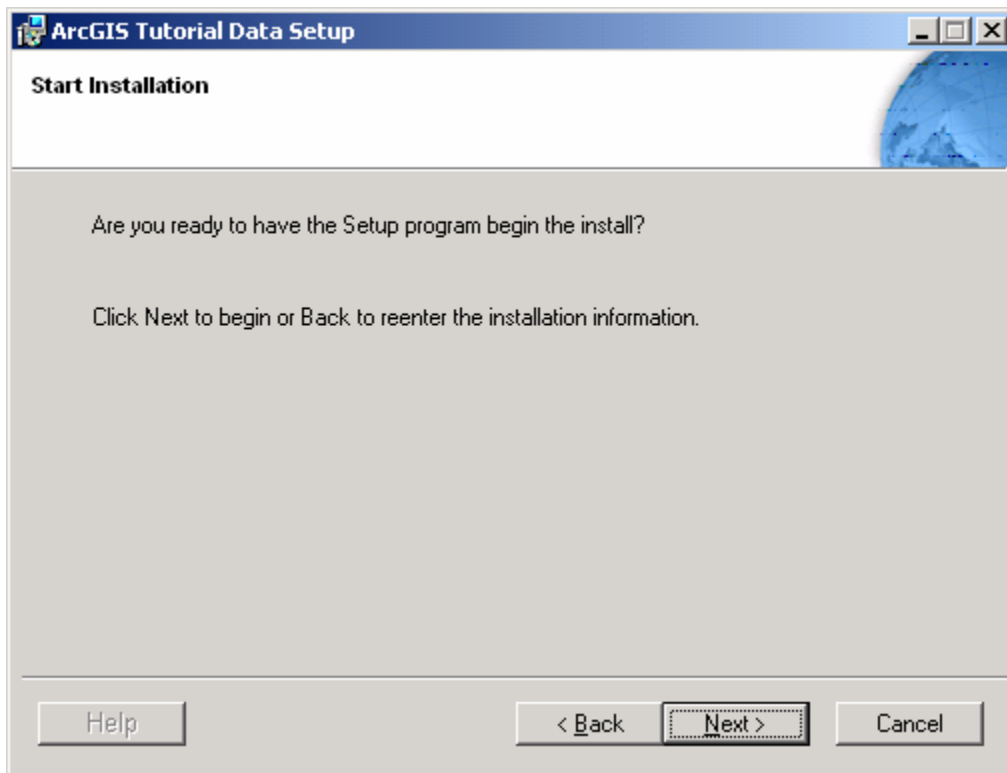


Choose **Typical** installation and then click **Next**.



Accept the default installation location or specify an alternate location and then click **Next**.



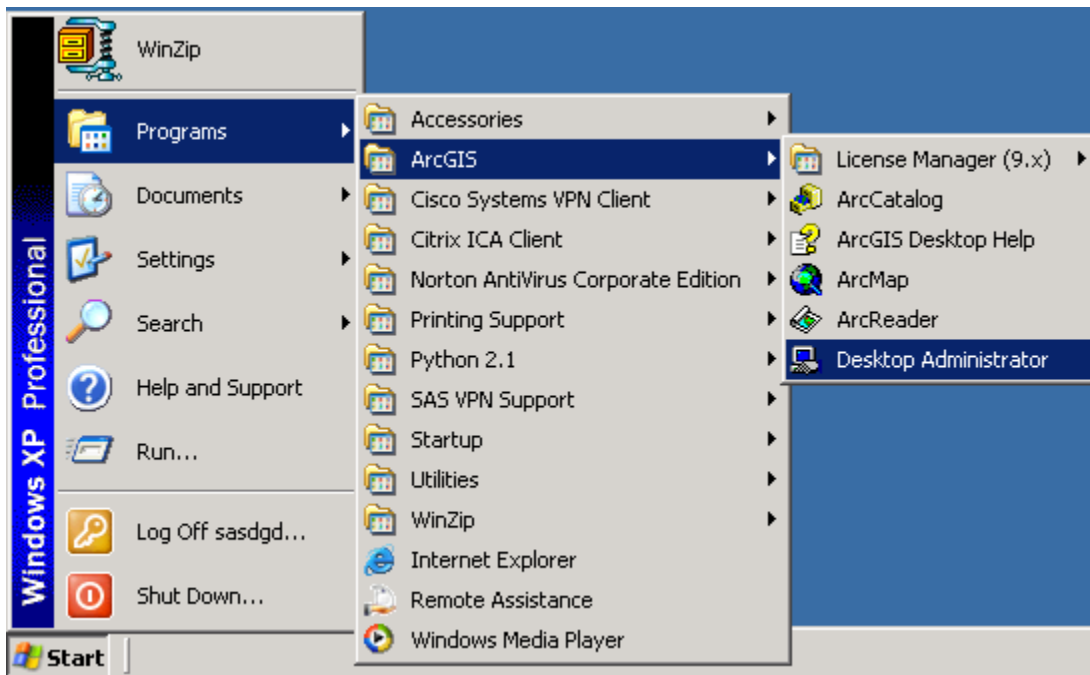


Confirm installation by clicking **Next**.

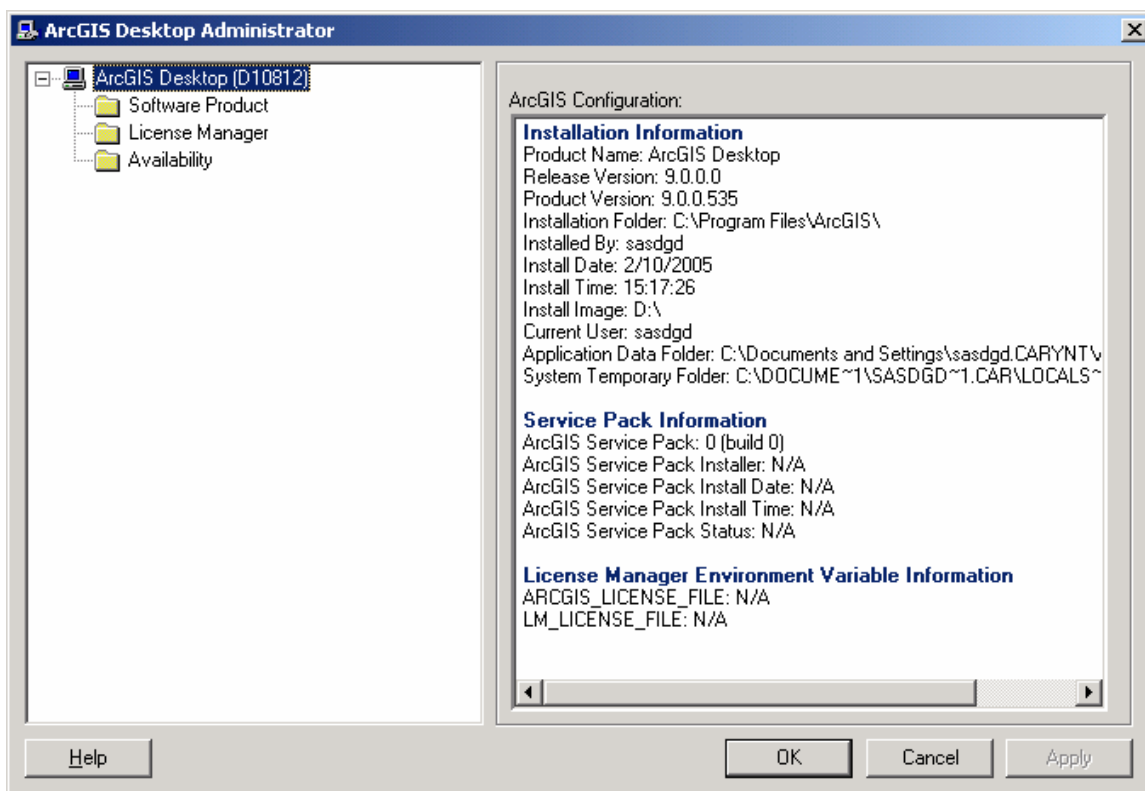


After the installation completes, click **Finish**.

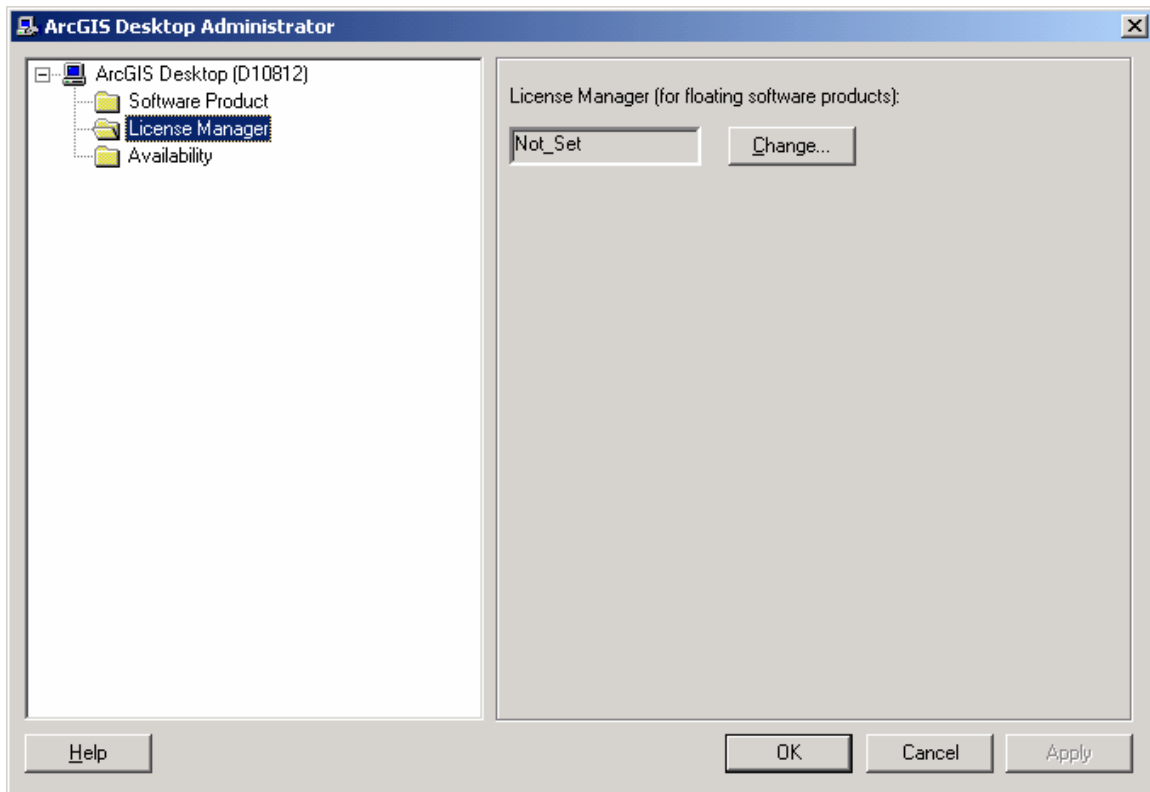
Bring up the ESRI Desktop Administrator. Click **Start** → **Programs** → **ArcGIS** → **Desktop Administrator**.



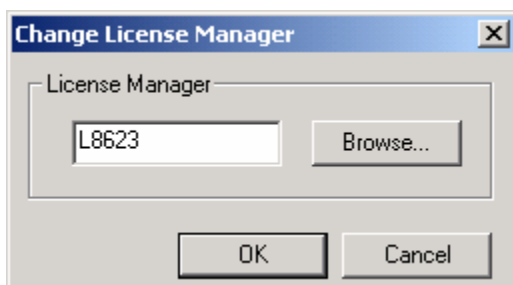
You will see the **ArcGIS Desktop Administrator** window:



Click **License Manager** in the folder tree in the left pane.



Click **Change** and specify the hostname of the License Manager.



Click **OK** (twice) to close the Desktop Administrator.

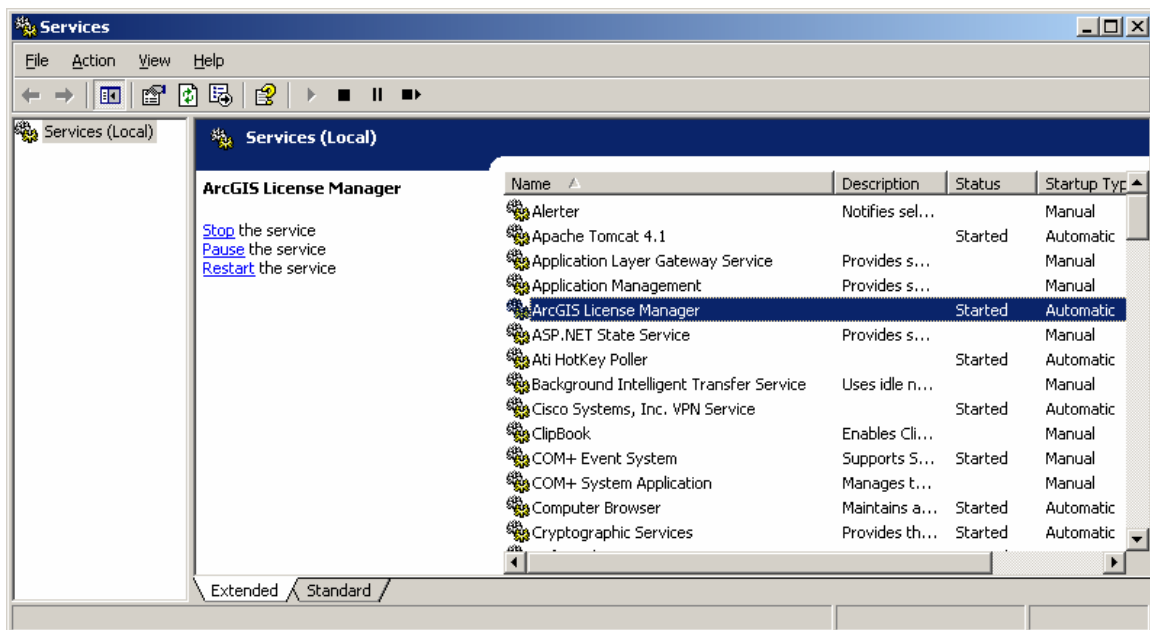
## Configuring the License Manager

Test to see that the hardware key is installed properly on the License Manager host by using the Sentinel test utility (**Start → Programs → ArcGIS → License Manager 9.x → Display Hardware Key Status**).

If the driver is working, you will see a window like this:



You can confirm that the License Manager is running by bringing up the **Services** window. The service name is **ArcGIS License Manager**.



At this point, you will be ready to run ArcView. You can start using the ArcGIS suite on the user's workstations by clicking **Start → Programs → ArcGIS → ArcMap**.

## Configuring the ESRI ArcView Client

Before you can use the ESRI software, the data files shipped with the software should be made accessible. Copy the data files to local directory, place them on a shared network drive, or use the provided CDs or DVDs.

*Note: All of the software required for SAS Fair Banking 8.1 should now be installed. Refer to the SAS Fair Banking Administrator's Guide for instructions for configuring the software and preparing to run SAS Fair Banking in your environment.*





## Appendix A — Installation Worksheet

This document is intended to capture site-specific information about the installation of SAS Fair Banking and all of its related components. Print or electronically fill in this document as you walk through the installation process.

SAS Server Machine name \_\_\_\_\_

Enterprise Guide Administrator metadata repository \_\_\_\_\_

J2EE Application Server

Vendor \_\_\_\_\_

Version \_\_\_\_\_

Machine name \_\_\_\_\_

SAS installation directory \_\_\_\_\_

List of hotfixes applied to the SAS software installation

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JDK installation directory \_\_\_\_\_

Web application installation Directory \_\_\_\_\_









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