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SAS[®] Customer Link Analytics 5.5

Migration Guide

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SAS® Customer Link Analytics 5.5: Migration Guide

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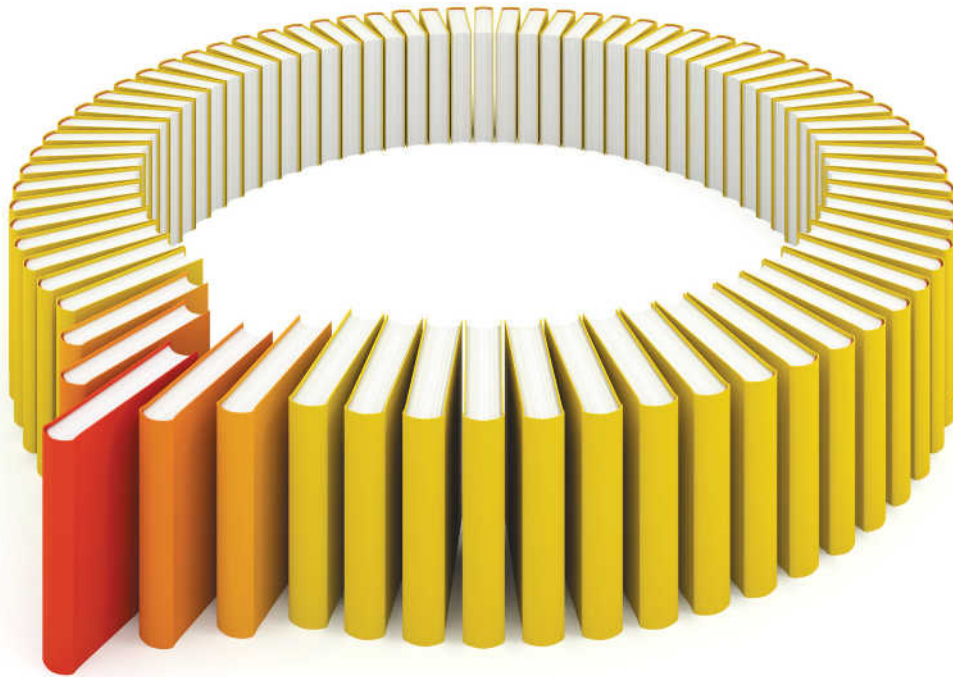
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Using This Book

Audience

This document explains how to migrate SAS Customer Link Analytics from a source machine to a target machine. The document assumes that you are familiar with the SAS 9.4 installation and configuration processes.

The instructions in this document describe the installation of SAS Customer Link Analytics on a three-tier environment in migration mode. A three-tier plan file includes the SAS server tier, middle tier, and client tier. The document explains how each tier of the solution (including the metadata and the user-created objects) and data are migrated from a source machine to a target machine.

Prerequisites

Before you migrate SAS Customer Link Analytics to your production environment, complete the following tasks:

- Read *SAS Intelligence Platform: Installation and Configuration Guide*, which is available at the following location: <http://support.sas.com/documentation/cdl/en/biig/62611/PDF/default/biig.pdf>
- Review the <http://support.sas.com/documentation/installcenter/index.html> page.

This page has the most up-to-date installation and configuration documentation for SAS software. The documentation on this site is grouped by SAS release, installation, and configuration type.

- SAS Customer Link Analytics is installed through SAS Deployment Wizard. For more information, see *SAS Customer Link Analytics: Administrator's Guide*, which is available at the following location: <http://support.sas.com/documentation/solutions/clac/index.html>.
- Review the system requirements for your operating system and upgrade to the required JDK. The system requirements document for SAS Customer Link Analytics can be found at: <http://support.sas.com/resources/sysreq/index.html>.
- Review the checklist that is generated with your plan file. This checklist lists the user accounts that you will need to create in your environment.
- Check that you have the correct version of the web application server for your environment. SAS Customer Link Analytics requires one of the following application servers:
 - IBM WebSphere

- Oracle WebLogic Application Server
- Red Hat JBoss
- Check the system requirements specification for details about the supported versions of the application server. Information about upgrading your web application server can be found at: <http://support.sas.com/resources/thirdpartysupport/v94/index.html>.
- You will need a plan file to install SAS Intelligence Platform and SAS Customer Link Analytics. Plan files can be obtained in the following ways:
 - Your SAS consultant can provide a plan file for your installation.
 - You can create a plan file using the planning tool, which is located at: https://www3.sas.com/apps/cpi/admincenter_planning_login.jsp.
- From the target machine, if you are using a database other than SAS, verify that you can access that third-party database (available on the data server) by using the database client.

Document Conventions

The following table lists the conventions that are used in this document:

Convention	Description
<SAS Home>	Represents the path to the folder where SAS is installed. For example, on a Windows computer, this can be <code>C:\Program Files\SASHome</code> .
<SAS configuration directory>	Represents the path to the folder where SAS configuration data is stored. For example, on a Windows computer, this can be <code>C:\SAS\Config</code> .
<SAS software depot>	Represents the path to the folder where the executable file for the SAS Deployment Wizard is available. For example, on a Windows computer this can be <code>C:\SAS Software Depot</code> .

Recommended Reading

When you read this document, you could refer to the following documents:

- *SAS Customer Link Analytics: Administrator's Guide*
- *SAS Customer Link Analytics: User's Guide*

For a complete list of SAS books, go to support.sas.com/bookstore. If you have questions about which titles you need, please contact a SAS Book Sales Representative:

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x *Recommended Reading*

1

Migration Tasks

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Overview of SAS Customer Link Analytics Migration

Moving SAS Customer Link Analytics from a pre-production environment (source machine) to a production environment (target machine) involves the following steps:

- 1 Using SAS Migration Utility, create a migration package on the source machine.
- 2 Install SAS Customer Link Analytics (using the migration package) on the target machine.
- 3 Import data.

Note: Any customizations that you have made to the SAS Customer Link Analytics configuration outside of the `<SAS configuration directory>` are not automatically migrated. You must manually make these customizations after migration. These customizations include any SAS code modifications, user-defined macros, custom scenarios, and database changes.

Pre-Migration Steps

Complete the following tasks before you run SAS Migration Utility on the source machine:

- 1 Stop the web application server (JBoss, WebSphere, or WebLogic, as applicable) and restart all other SAS servers.
- 2 Open the `smu.properties.template` file, which is available at the following location: `<SAS Software Depot>/utilities/smu94`.

- 3 Add the following code after the line for property:

```
#levconfig.exclude.dir.12BYTE.3
```

This code prevents the data that is mentioned in the following directories from being included in the migration package:

Windows

```
levconfig.exclude.dir.12BYTE.5= C:\\SAS\\Config\\Lev1\\
\\AppData\\SASCustomerLinkAnalytics\\CustLinkAnalytics5.5
```

Note: C:\\SAS\\Config\\ is the default SAS configuration directory. If you have the SAS configuration directory in a different location, update this path accordingly.

UNIX

```
levconfig.exclude.dir.12BYTE.5=<SAS configuration
directory>/AppData/SASCustomerLinkAnalytics/
CustLinkAnalytics5.5
```

Note: If you want to migrate all the data to the target environment, do not add these lines. For scenarios in which SAS Customer Link Analytics is deployed with SAS as a business data mart, you might need to add this code. This is because the output of SAS Customer Link Analytics projects and scenarios can be large. As a result, the size of the migration package can be huge. It is recommended that you migrate this data manually after the migration is complete.

- 4 In the smu.properties.template file, change the values of the following properties according to your deployment:

Note: If the properties are commented, uncomment them by removing the hash sign (#) from the beginning of the line. Values that are mentioned here are examples for a Windows machine:

```
SMU.config.dir=C:\\SAS\\Config\\Lev1
```

```
SMU.SASROOT=C:\\Program Files\\SASHome\\SASFoundation\\9.4
```

```
SMU.SASHOME=C:\\Program Files\\SASHome
```

```
SMU.host.metadata=<Full name of the source machine.
```

For example, the machine name can be: SMU.host.metadata= server01.abc.com>

```
SMU.user=sasadm@saspw
```

```
SMU.password= {SAS001}UGFzc3dvcmQx
```

```
SMU.Output.Dir=<Full path where the migration package will be created.
```

For example, the path can be: C:\\SMU_Latest\\migrationPackage>

```
SMU.localhost=<Full name of the source machine.
```

For example, the path can be: SMU.localhost = server01.abc.com>

```
SMU.scs.url= http://server01.abc.com/SASContentServer/admin
```

```
SMU.scs.user=sasadm@saspw
```

```
SMU.scs.password=Password1
```

```
SMU.webinfpltfm.dbms.userid=SharedServices
```

```
SMU.webinfpltfm.dbms.password=Password1
```

```
SMU.webapp.bisrvmid.dbms.userid=vatadm
SMU.webapp.bisrvmid.dbms.password=Password1
SMU.SAS.version=9.4
```

- 5 Save the changes that you have made.

Create a Migration Package on the Source Machine

To create a migration package:

- 1 On the source machine, run SAS Migration Utility.
 - a On the command prompt, go to the <SAS Software Depot>/utilities/smu94 directory in which the smu94_xxx executable file is located.
 - b On the command prompt, run this command to create the migration package:

For SAS 9.4 on Windows 64-bit:

```
smu94_x64 -properties <absolute pathname to property file
smu.properties.template> -replace
```

For SAS 9.4 on UNIX:

```
./smu94 -- -properties <absolute pathname to property file
smu.properties.template> -replace
```

For detailed instructions on how to run SAS Migration Utility, see *SAS 9.4 Intelligence Platform: Migration Guide*, which is available at the following location: <http://support.sas.com/documentation/cdl/en/bimig/63853/PDF/default/bimig.pdf>.

- 2 The analysis phase of the migration checks the version of the solution that you are migrating, and then it creates a migration package. The migration package is created at the location that you specified in the SMU.Output.Dir property in the smu.properties.template file.

It also generates a report (FullReport.html) that shows whether the migration package was created successfully. The report is generated in the following location:

Windows

```
<Output path specified in the smu.properties file>/<machine
name>/AnalysisReport/
```

UNIX

```
<Output path specified in the smu.properties file>/machine
name/AnalysisReport/
```

- 3 Verify the warnings and errors in the analysis report and resolve these warnings or errors.
- 4 Copy the migration package to the target machine.

Install SAS Customer Link Analytics on the Target Machine

You have to install SAS Customer Link Analytics by using the migration package.

To install SAS Customer Link Analytics:

- 1 On the target machine, run SAS Deployment Wizard.
- 2 On the migration information screen of the wizard, specify the path to the migration package on the target machine.
- 3 Change the default application server context name from SASMeta to SASApp wherever applicable.
- 4 Complete the rest of the steps using the default settings of SAS Deployment Wizard.

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Post-Migration Tasks

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Migrate Data

Copy the physical folders with data from the following directory on the source machine to the corresponding directory on the target machine:

Note: You do not need to perform this task if you have not provided any values for the `levconfig.exclude.dir.12BYTE.5` property in the `smu.properties` file.

Windows

```
C:\SAS\Config\Lev1\AppData\SASCustomerLinkAnalytics\
CustLinkAnalytics5.5
```

Note: `C:\SAS\Config\` is the default SAS configuration directory. If you have the SAS configuration directory in a different location, update this path accordingly.

UNIX

```
<SAS configuration directory>/AppData/
SASCustomerLinkAnalytics/CustLinkAnalytics5.5.
```

Migrate the SAS Enterprise Miner Project Workspace

You might have created various SAS Rapid Predictive Modeler models for viral effect analysis. In this case, copy the folders with the project workspaces from the source machine to the corresponding directory on the target machine.

Validation Instructions

Verify the Properties of Software Components

To verify the software component properties:

- 1 Open SAS Management Console with the profile of an administrator.
- 2 On the **Plug-ins** tab, select **SAS Management Console ▶ Application Management ▶ Configuration Manager**.
- 3 Right-click **Cust Link Analytics Svr Cfg 5.5**, and then select **Properties**.
- 4 In the Properties dialog box, select the **Advanced** tab. On this tab, you can see a list of the properties and their values. If the value of any software component property has been changed after deployment on the source machine, make sure that the corresponding change is also reflected on the target machine.
- 5 Check whether the values are correctly assigned.
- 6 Click **OK**.
- 7 Close SAS Management Console.

Verify the User Group and the Metadata User in SAS Management Console

Verify that all the operating system users who are configured in SAS Management Console have also been migrated to the metadata on the target environment. Also, verify that the roles and capabilities that are assigned to these users are retained in the target environment.