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Pre-Installation Tasks

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Pre-installation Tasks

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Pre-installation Tasks

Installation Prerequisites

The following prerequisites are required before you begin the installation of the SAS Credit Risk Management for Banking solution:

- understand the deployment process that best accomplishes your project goals
- understand the directories and planning files.
- for project installations, you need to create a project plan describing your desired architecture and deployment of solution components
- complete the SAS Intelligence Platform pre-installation checklist, which helps to ensure a successful installation process
- set up the required user accounts
- define SAS Credit Risk Studio user groups that are based on their roles within the solution:
 - CreditRiskAdmin
 - CreditRiskAnalyst
 - CreditRiskUser

Note: You must match the spelling and case exactly.

- run the SAS Credit Risk Management for Banking application and related Web applications

Pre-Installation Tasks

Pre-installation Checklist

Before you begin to install any software, you need to record information in one or more checklists and to perform a set of tasks described in those checklists. You need to use one checklist for the platform(s) on which you install SAS Credit Risk Management for Banking and include a pre-installation checklist for each tier where you deploy software components. If you install the SAS servers and the Web application infrastructure on the same platform, then you only need one checklist.

Note: The pre-installation checklists are referenced in the `index.html` file that comes with the planning package.

Table 1 is a tool that you can use to keep track of each task's completion. You can print this checklist and add checkmarks, e.g., [x], in the Done column after you complete each task.

Table 1. Post-installation Checklist

Task	Done
Review the appropriate checklists to see what information you need to record and what tasks you need to perform.	[]
Read the section about preparing to run Web applications for information about building the necessary infrastructure for the SAS Web applications that you might run.	[]
Create required operating system user accounts.	[]
Verify your plan.	[]

Create Users on the Operating System

For a more secure deployment, you can consult with your system administrator to create a SAS Credit Risk Management for Banking user group, and ensure that the group contains all of the SAS Credit Risk Management for Banking users in each of the solution roles.

You must include any user who runs SAS code in batch mode or from the Web as part of the group. In addition, the group must contain the `<criskm.privileged.userid>` user and the user ID under which the SAS Stored Process Server runs, which usually is the `sassrv` user ID.

If there is an existing operating system group that serves your purpose, then you can use that existing group, or you can create a new group such as `SASCreditRiskUsers`. The exact method of how to create this group varies according to which operating system you use.

Note: In UNIX, the group that you define must be the primary default group for the SAS Credit Risk Management for Banking users and the SAS server users (<*criskm.privileged.userid*>) and the stored process server user (e.g., *sassrv*). The primary default group is the group whose ID is associated with the user ID in the `/etc/passwd` file.

Verify Your Plan

- SAS Credit Risk Management for Banking Components:

You should verify that the SAS Credit Risk Management for Banking software components that you selected for each host match exactly what you want to deploy. You should remove components from the plan that you do not want to install.

- Recommended Components:

Within the SAS planning application, on the Software panel where you select which software components to deploy on which host, make sure that you considered including the recommended products marked with a single asterisk (*).

Within the SAS planning application, on the Software panel where you select which software components to deploy on which machine, make sure that you review the items marked with a double asterisk (**) to assure that they are selected for only one machine. A plan contains only one SAS Metadata Server.

- Web Applications:

You must include the name of the Web application server and WebDAV server software that you plan to use, even if that software is already installed on your system. You can select either Apache or Xythos (but not both), and only one of WebSphere, WebLogic, or Tomcat.

