



SAS[®] Forecast Analyst Workbench 5.2: Upgrade and Migration Guide

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SAS® Forecast Analyst Workbench 5.2: Upgrade and Migration Guide

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Migrate SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2

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Introduction to Migrating SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2

This chapter explains the tasks for migrating SAS Forecast Analyst Workbench 5.1 installed on SAS 9.3 to SAS Forecast Analyst Workbench 5.2 installed on the second maintenance release of SAS 9.4. Migrating from SAS 9.3 to the

second maintenance release of SAS 9.4 is implicitly performed during this migration.

This information assumes that you are familiar with the SAS 9.4 installation and configuration processes.

Performing Pre-migration Tasks

Prerequisites for Migrating SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2

When you are performing a migration from SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2, the following prerequisites apply:

- Review the system requirements for SAS Forecast Analyst Workbench 5.2. The detailed system requirements for SAS Forecast Analyst Workbench 5.2 in distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrsr/67819/HTML/default/index.html>.

The detailed system requirements for SAS Forecast Analyst Workbench 5.2 in non-distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrndmsr/67820/HTML/default/index.html>.

- Install SAS Intelligence Platform. For more information about installing SAS Intelligence Platform, see *SAS Intelligence Platform: Installation and Configuration Guide* at <http://support.sas.com/documentation/cdl/en/biig/63852/PDF/default/biig.pdf>.
- Ensure that you comply with the SAS 9.4 system requirements. For more requirements information, see “SAS 9.4 System Requirements” at <http://support.sas.com/resources/sysreq/index.html>.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data* and UIART.

Update the Migration Properties File

To update the migration utility properties file:

- 1 Make a copy of the `smu.properties.template` file (that is available at `<SAS Software Depot>/utilities/smu93`) and save the copy with the name `smu.properties` at the same location.
- 2 Edit the `smu.properties` file:
 - a Provide the following details:
 - a valid path for `SMU.data.dbms.jdbc.jar.dir` to where the JAR file is available on the Windows or UNIX system
 - a user name and password for the MySQL database administrator in the `SMU.data.dbms.admin.userid` and `SMU.data.dbms.admin.passwd` properties respectively

The following code explains the `smu.properties` file.

```
# MySQL JDBC properties for the database administrative user.
# All are required for SAS Forecast Analyst Workbench migration to 5.2+.
SMU.data.dbms.jdbc.jar.dir=C:\\TestSetup\\SAS Install\\Misc
SMU.data.dbms.admin.userid=sqladmin
## Required by SAS Financial Management, as well.
SMU.data.dbms.admin.passwd=<Password>

# Optional MySQL JDBC properties for migration
of SAS Forecast Analyst Workbench
to 5.2+.
# These may be used if there have been changes since
the last configuration by
the SAS Deployment Wizard.
# SMU.faw.database.host=localhost
# SMU.faw.database.port=3306
# SMU.faw.database.name=fawdb
```

Note: Make sure that you retain the double backward slashes (\\) when you update the paths for UNIX and double forward slashes (//) when you update the paths for Windows.

- b** Change the values of the following properties according to your deployment.

```
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=<machine name>.<domain name>.com
SMU.port.metadata=8561
SMU.user=sasadm@saspw
SMU.password=<Password>
SMU.Output.Dir=C:\\migrationPackage
SMU.localhost=<machine name>.<domain name>.com
SMU.scs.url=http://<machine name>.<domain name>.com/SASContentServer/admin
SMU.scs.user=sasadm@saspw
SMU.scs.password=<Password>
SMU.webinfpltfm.dbms.userid=SharedServices
SMU.webinfpltfm.dbms.password=<Password>
SMU.SAS.version=9.3
```

Note: If the properties are commented, uncomment them by removing the hash sign (#) from the beginning of the line.

Migrating SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2

Create a Migration Package

On the source machine that contains SAS Forecast Analyst Workbench 5.1, run the SAS Migration Utility. For instructions on how to run the SAS Migration Utility, see *SAS 9.4 Intelligence Platform: Migration Guide*. The guide is available at

<http://support.sas.com/documentation/cdl/en/bimig/63853/HTML/default/viewer.htm>.

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

The SAS Migration Utility also generates a report (`FullReport.html`) that shows whether the migration package was created successfully.

The report is generated at the following location:

- **On Windows:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/
- **On UNIX:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/

Deploy SAS Forecast Analyst Workbench 5.2 By Using the Migration Package

In order to deploy SAS Forecast Analyst Workbench 5.2 by using the migration package, ensure that you choose the following settings in SAS Deployment Wizard:

- select **Custom Configuration**
- select the **Perform Migration** check box, and then specify the path of the migration package that you created
- select **SASApp** as a server context when you are prompted

The migration handles the data migration from SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2 format. This includes data transformations to be made on SAS data and converting the MySQL tables to PostgreSQL tables.

Performing Post-migration Tasks

About Post-migration Tasks

Immediately after you perform the migration of SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Forecast Analyst Workbench 5.2: Administrator's Guide*.

The post-migration tasks are described in detail in this chapter.

Note: After you perform the post-migration tasks, you must restart all SAS servers.

Create a SAS Forecast Analyst Workbench User

Create the solution-specific operating system user that existed on the source machine. On Windows, this user must be a member of the SAS Server Users

group. On UNIX, this user must be a member of the group that the installation user belongs to.

For more information about users and groups, see “Setting Up Users, Groups, and Ports” in *SAS Intelligence Platform: Installation and Configuration Guide*. The document is available at <http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm>.

Assign Users Permissions on Windows

On Windows, the users who are using SAS Forecast Analyst Workbench must exist as operating system users or must be a part of the domain of the server. You must assign the users Read, Write, and Modify permissions for the following folders on Windows:

- the SAS Forecast Analyst Workbench data folder that is referenced in the `GL_DATA_STORAGE_PATH` configuration parameter
- the SAS Forecast Analyst Workbench archive folder that is referenced in the `GL_DDF_ARCHIVE_DIR_PATH` configuration parameter
- the forecasting-related logs folder that is referenced in the `GL_FORECAST_LOG_PATH` configuration parameter
- the SAS Forecast Analyst Workbench logs folder that is referenced in the `GL_DDCF_LOG_PATH` configuration parameter
- the SAS Financial Management data folder that is located at `SAS-configuration-directory/Levn/SASApp/Data`

Note: If you are not using collaboration planning, you do not need to provide permission to this folder.

Note: The element `SAS-configuration-directory` represents the default SAS configuration directory. For example, on a Windows machine, this location can be `C:\SAS\Config\Lev1`. If your SAS configuration directory is in a different location, update this path accordingly.

Assign Users Permissions on UNIX

In a UNIX operating environment, you must update several SAS script files. Updating the files ensures that SAS users have the necessary Write permissions to the tables that the SAS Workspace Server and the SAS Stored Process Server create.

Specify a umask setting of at least 002 in the following SAS scripts:

- `SAS-configuration-directory/Levn/SASApp/BatchServer/sasbatch_usermods.sh`
- `SAS-configuration-directory/Levn/SASApp/PooledWorkspaceServer/PooledWorkspaceServer_usermods.sh`
- `SAS-configuration-directory/Levn/SASApp/StoredProcessServer/StoredProcessServer_usermods.sh`
- `SAS-configuration-directory/Levn/SASApp/WorkspaceServer/WorkspaceServer_usermods.sh`

After you specify the umask setting, you must restart the object spawner.

Update SAS Metadata User Groups

The SAS Forecast Analyst Workbench 5.1 groups are migrated to the SAS Forecast Analyst Workbench 5.2 environment. However, you must add the members of the SAS Forecast Analyst Workbench 5.1 groups to the SAS Forecast Analyst Workbench 5.2 groups.

To update the user groups:

- 1 Add the members of the SAS Forecast Analyst Workbench 5.1 groups to the SAS Forecast Analyst Workbench 5.2 groups.

The following table helps you map the SAS Forecast Analyst Workbench 5.2 groups with standard SAS Forecast Analyst Workbench 5.1 groups.

Table 1.1 Mapping of User Groups

SAS Forecast Analyst Workbench 5.1 Groups	SAS Forecast Analyst Workbench 5.2 Groups
Analyst	Forecast Analyst Analysis Users
Planning	Forecast Analyst Planning Users
-	Forecast Analyst Process Administration Users
ETL Users	Forecast Analyst ETL Users
Forecast Analyst — MSOL Users Group	Forecast Analyst Database Users

- 2 Run `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave11 (Migration)/faw_1101_data_migration` through SAS Data Integration Studio.

The migration job performs the following tasks:

- transforms the data structures of SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2
- updates the mapping of users and groups in the migrated environment with the data in the solution

- 3 Authorize the SAS Forecast Analyst Workbench 5.2 groups to the smart objects if you had provided authorization to the corresponding SAS Forecast Analyst Workbench 5.1 groups.

For more information, see “Assigning Permissions to a User or Group for a Forecast, for a Modeling Project, or for a Plan” in *SAS Forecast Analyst Workbench: Administrator’s Guide*.

- 4 Delete the SAS Forecast Analyst Workbench 5.1 groups.

Update the CONFIG.DIM_TABLE_LIST and CONFIG.TIME_DIM_HIERARCHY_LVL Tables

To update the CONFIG.DIM_TABLE_LIST and CONFIG.TIME_DIM_HIERARCHY_LVL tables after migration:

- 1 ■ Edit the PROD_SUCC_IND and ORDER_DIM columns of the CONFIG.DIM_TABLE_LIST table to meet your business requirements.

After migration is performed, the PROD_SUCC_IND and ORDER_DIM columns are added to the CONFIG.DIM_TABLE_LIST table. The PROD_SUCC_IND column is used for product succession in the Administration workspace in the user interface. By default, the PROD_SUCC_IND column is set to 1. The ORDER_DIM column contains the order in which the dimensions are displayed in the user interface while relationships are added in the Administration workspace. By default, the ORDER_DIM column contains values taken from DIM_RK.

Edit the PROD_SUCC_IND and ORDER_DIM columns of the CONFIG.DIM_TABLE_LIST table.

After migration, ensure that the PROD_SUCC_IND and ORDER_DIM columns contain values that meet your business requirement. For more information about the CONFIG.DIM_TABLE_LIST table, see *SAS Forecast Analyst Workbench: Administrator's Guide*.

- Edit the DEFAULT_PAST_PERIODS and DEFAULT_FUTURE_PERIODS columns of the CONFIG.TIME_DIM_HIERARCHY_LVL table to meet your business requirements.

After migration is performed, the DEFAULT_PAST_PERIODS and DEFAULT_FUTURE_PERIODS columns are added to the CONFIG.TIME_DIM_HIERARCHY_LVL table. The DEFAULT_PAST_PERIODS column contains a default number of history periods to consider for collaboration planning. The DEFAULT_FUTURE_PERIODS column contains a default number of future periods to consider for collaboration planning.

After migration, the DEFAULT_PAST_PERIODS and DEFAULT_FUTURE_PERIODS columns contain the following values by default:

Hierarchy level periodicity	History periods (in terms of the hierarchy level periodicity)	Future periods (in terms of the hierarchy level periodicity)
CAL_YR (Year)	3	3
CAL_QTR (Quarter)	12	12
CAL_MTH (Month)	12	12
CAL_DAY (Day)	12	12
CAL_WK (Week)	12	12

Note: The history periods and future periods must be defined for all hierarchy level periodicities.

2 Run the following SAS Data Integration Studio jobs:

- `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave02`
- `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave03`

Ensure that the changes that you make in the configuration tables are reflected in the tables for SAS Forecast Analyst Workbench 5.2. For more information about the ongoing jobs, see *SAS Forecast Analyst Workbench: Administrator's Guide*.

Update SAS Forecast Studio Projects in the Migrated Environment

For the SAS Forecast Studio projects to be migrated to the SAS Forecast Analyst Workbench 5.2 environment from the SAS Forecast Analyst Workbench 5.1 environment, you need to perform following steps:

- 1 Register SAS Forecast Studio 13.2 in the SAS Forecast Analyst Workbench 5.2 environment:
 - a Log on to SAS Management Console as a user who can register SAS Forecast Studio 13.2.
 - b On the **Plug-ins** tab, select **Application Management** ► **Forecast Server** ► **FAW**.
 - c Right-click **FAW**, and select **Unregister**. The FAW environment unregisters.
 - d Right-click **Forecast Server**, and select **Register Environment**. The **Register Environment** dialog box appears.
 - e In the **Register Environment** dialog box, enter the following information:
 - specify the environment name as **FAW**
 - specify the host name as **SASApp - Logical Workspace Server**
 - specify the location as **SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data/FS_PROJ**
 - specify reports folder as **/System/Applications/SAS Forecast Server/Forecast Server 13.2**

Ensure that this path is the path that is specified in the `GL_FS_PROJ_REPO_PATH` and `GL_FS_PROJ_DATA_STORAGE_PATH` parameters. For more information, see *SAS Forecast Analyst Workbench: Administrator's Guide*.
 - f Click **OK**.
- 2 Depending on the independent variables that were a part of the plan created in SAS Forecast Analyst Workbench 5.1, perform the one of the following actions:

- Suppose the plan in SAS Forecast Analyst Workbench 5.1 did not contain independent variables. For such a plan, the SAS Forecast Studio project was created in SAS Forecast Analyst Workbench 5.1. This SAS Forecast Studio project is migrated to modeling project in SAS Forecast Analyst Workbench 5.2. You do not need to take any additional action for this plan.
- Suppose the plan in SAS Forecast Analyst Workbench 5.1 contained independent variables. For such a plan, the SAS Forecast Studio project was created in SAS Forecast Analyst Workbench 5.1. This SAS Forecast Studio project is not migrated to modeling project in SAS Forecast Analyst Workbench 5.2. You must re-create the modeling project in SAS Forecast Analyst Workbench 5.2.

Update Events That Contain Missing Data

To update the events that contain missing values:

- 1 Delete the event that contains missing values for the `_KEYNAME_` and `_STARTDATE_` columns in the `CONFIG.CREATE_EVENT` table.
- 2 Delete the same event from the `CONFIG.EVENT_REQUIRED` table.
- 3 Run the following job from SAS Data Integration Studio: `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave03/faw_0303_load_event_table`

Remove Consensus Plans

The consensus plans that were created in SAS Forecast Analyst Workbench 5.1 cannot be migrated to SAS Forecast Analyst Workbench 5.2. However, you must remove the data for the consensus plan that was created through SAS Forecast Analyst Workbench 5.1 in SAS Financial Management in order for the collaboration process to run smoothly in SAS Forecast Analyst Workbench 5.2.

To remove the consensus plans data from SAS Financial Management:

- 1 In SAS Financial Management, remove the data for each consensus plan. You can delete the data of the consensus plan in the following sequence:
 - 1 form set
 - 2 phase
 - 3 model
 - 4 cycle
 - 5 dimensions that were created for SAS Forecast Analyst Workbench 5.1
 - 6 SAS Financial Management stage area (for example, `ANALYSIS`, `ANALYSIS_ASSOC`, `ANALYSIS_ASSOC_TYPE`, `ANALYSIS_NLS`, `GL_ACCOUNT`, `GL_ACCOUNT_ASSOC`, `GL_ACCOUNT_ASSOC_TYPE`, `GL_ACCOUNT_NLS`, `PRODUCT`, `PRODUCT_ASSOC`, `PRODUCT_ASSOC_TYPE`, and `PRODUCT_NLS`)

For more information about deleting the form set and phase, see “Forms and the Forms Workspace” in *SAS Financial Management: Process Administrator's Guide*.

For more information about deleting the cycle, see “Cycles and Cycle Periods” in *SAS Financial Management: Process Administrator's Guide*.

For more information about deleting the model, see “Overview of Models” in *SAS Financial Management: Process Administrator's Guide*.

If the Stakeholder dimension was used previously, ensure that the updated data structure of the Stakeholder dimension is loaded and that all the required columns are populated. For example, at least one stakeholder mentioned in the DEFAULT_STAKEHOLDER_IND column can be set to 1, and the other stakeholders must be set to 0.

- 2 Run the ETL jobs in the following sequence to integrate with SAS Financial Management:
 - 1 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave04 (FM Integration - Configuration)/faw_0401_generate_fm_config_tables
 - 2 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/faw_0501_load_fm_stg_config_tables
 - 3 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/faw_0502_load_fm_sdm_data_locale
 - 4 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/
faw_0503_create_fm_sdm_dimension_types
 - 5 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/faw_0504_create_fm_sdm_dimensions
- 3 After the data is loaded to solution data layer, run the following ongoing jobs to integrate with SAS Financial Management:
 - 1 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0601_load_fm_stg_dimensions
 - 2 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0602_load_fm_sdm_users
 - 3 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0603_load_fm_sdm_groups
 - 4 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0604_load_fm_sdm_users_x_groups
 - 5 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0605_load_fm_sdm_dimensions

For more information about running the ETL jobs, see *SAS Forecast Analyst Workbench: Administrator's Guide*.

Use of Seeding Templates

Do not use the seeding templates that are in the SAS Forecast Analyst Workbench 5.1. Seeding templates for SAS Forecast Analyst Workbench 5.2 are located at *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/templates*. You can manually make the changes in seeding templates that are created in SAS Forecast Analyst Workbench 5.2 from the seeding the templates that were created for SAS Forecast Analyst Workbench 5.1.

For more information about seeding, see *SAS Forecast Analyst Workbench: Administrator's Guide*.

Migrate SAS Forecast Analyst Workbench 5.2 to a Target Machine

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Introduction to Migrating SAS Forecast Analyst Workbench 5.2 to a Target Machine

This chapter explains the tasks for migrating SAS Forecast Analyst Workbench 5.2 from a source machine to a target machine. This chapter assumes that you are familiar with the SAS 9.4 installation and configuration processes.

Performing Pre-migration Tasks

Prerequisites for Migrating SAS Forecast Analyst Workbench 5.2 from a Source Machine to a Target Machine

When you are migrating SAS Forecast Analyst Workbench 5.2 from a source machine to a target machine, the following prerequisites apply:

- Review the system requirements for SAS Forecast Analyst Workbench 5.2. The detailed system requirements for SAS Forecast Analyst Workbench 5.2 in distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrsr/67819/HTML/default/index.html>.
The detailed system requirements for SAS Forecast Analyst Workbench 5.2 in non-distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrndmsr/67820/HTML/default/index.html>.
- Install SAS Intelligence Platform on the target machine. For more information about installing SAS Intelligence Platform, see *SAS Intelligence Platform: Installation and Configuration Guide* at <http://support.sas.com/documentation/cdl/en/biig/63852/PDF/default/biig.pdf>.
- Ensure that you comply with the SAS 9.4 system requirements. For more requirements information, see “SAS 9.4 System Requirements” at <http://support.sas.com/resources/sysreq/index.html>.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data* and UIART.

Update the Migration Properties File

To update the migration utility properties file:

- 1 Make a copy of the `smu.properties.template` file (that is available at `<SAS Software Depot>/utilities/smu94`) and save the copy with the name `smu.properties`.
- 2 Edit the `smu.properties` file according to your deployment:

```
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=<machine name>.<domain name>.com
SMU.port.metadata=8561
SMU.user=sasadm@saspw
SMU.password=<Password>
SMU.Output.Dir=C:\\migrationPackage
SMU.localhost=<machine name>.<domain name>.com
SMU.scs.url=http://<machine name>.<domain name>.com/SASContentServer/admin
SMU.scs.user=sasadm@saspw
SMU.scs.password=<Password>
SMU.private.webinfdsvr.install.dir=
```

```
C:\\Program Files\\SASHome\\SASWebInfrastructurePlatformDataServer\\9.4
SMU.webinfpltfm.dbms.userid=SharedServices
SMU.webinfpltfm.dbms.password=<Password>
SMU.webapp.bisrvmid.dbms.userid=vatadm
SMU.webapp.bisrvmid.dbms.password=<Password>
SMU.SAS.version=9.4
```

Note: If the properties are commented, uncomment them by removing the hash sign (#) from the beginning of the line.

Migrating SAS Forecast Analyst Workbench 5.2 to a Target Machine

Create a Migration Package

On the source machine that contains SAS Forecast Analyst Workbench 5.2, run the SAS Migration Utility. For instructions on how to run the SAS Migration Utility, see *SAS 9.4 Intelligence Platform: Migration Guide*. The guide is available at <http://support.sas.com/documentation/cdl/en/bimig/63853/HTML/default/viewer.htm>.

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

The SAS Migration Utility also generates a report (`FullReport.html`) that shows whether the migration package was created successfully.

The report is generated at the following location:

- **On Windows:** `<Output path specified in the smu.properties file>/<machine name>/AnalysisReport/`
- **On UNIX:** `<Output path specified in the smu.properties file>/<machine name>/AnalysisReport/`

Deploy SAS Forecast Analyst Workbench 5.2 By Using the Migration Package

In order to deploy SAS Forecast Analyst Workbench 5.2 by using the migration package, ensure that you choose the following settings in SAS Deployment Wizard:

- select **Custom Configuration**
- select the **Perform Migration** check box, and then specify the path of the migration package that you created
- select **SASApp** as a server context when you are prompted

Performing Post-migration Tasks

About Post-migration Tasks

Immediately after you perform the migration of SAS Forecast Analyst Workbench 5.2 from a source machine to a target machine, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Forecast Analyst Workbench 5.2: Administrator's Guide*.

Note: After you perform the post-migration tasks, you must restart all SAS servers.

Create a SAS Forecast Analyst Workbench User

Create the solution-specific operating system user that existed on the source machine. On Windows, this user must be a member of the SAS Server Users group. On UNIX, this user must be a member of the group that the installation user belongs to.

For more information about users and groups, see “Setting Up Users, Groups, and Ports” in *SAS Intelligence Platform: Installation and Configuration Guide*. The document is available at <http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm>.

Assign Users Permissions on Windows

On Windows, the users who are using SAS Forecast Analyst Workbench must exist as operating system users or must be a part of the domain of the server. You must assign the users Read, Write, and Modify permissions for the following folders on Windows:

- the SAS Forecast Analyst Workbench data folder that is referenced in the `GL_DATA_STORAGE_PATH` configuration parameter
- the SAS Forecast Analyst Workbench archive folder that is referenced in the `GL_DDF_ARCHIVE_DIR_PATH` configuration parameter
- the forecasting-related logs folder that is referenced in the `GL_FORECAST_LOG_PATH` configuration parameter
- the SAS Forecast Analyst Workbench logs folder that is referenced in the `GL_DDCF_LOG_PATH` configuration parameter
- the SAS Financial Management data folder that is located at `SAS-configuration-directory/Levn/SASApp/Data`

Note: If you are not using collaboration planning, you do not need to provide permission to this folder.

Note: The element `SAS-configuration-directory` represents the default SAS configuration directory. For example, on a Windows machine, this location can be `C:\SAS\Config\Lev1`. If your SAS configuration directory is in a different location, update this path accordingly.

Assign Users Permissions on UNIX

In a UNIX operating environment, you must update several SAS script files. Updating the files ensures that SAS users have the necessary Write permissions to the tables that the SAS Workspace Server and the SAS Stored Process Server create.

Specify a umask setting of at least 002 in the following SAS scripts:

- *SAS-configuration-directory/Levn/SASApp/BatchServer/sasbatch_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/PooledWorkspaceServer/PooledWorkspaceServer_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/StoredProcessServer/StoredProcessServer_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/WorkspaceServer/WorkspaceServer_usermods.sh*

After you specify the umask setting, you must restart the object spawner.

You must provide permission to the user for the SAS Forecast Studio data folder that is located at *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data/HPF*.

Migrate SAS Forecast Analyst Workbench 5.1 to SAS Forecast Analyst Workbench 5.2 Maintenance 2

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Introduction to Migrating SAS Forecast Analyst Workbench 5.1 to the Second

Maintenance Release of SAS Forecast Analyst Workbench 5.2

This chapter explains the tasks for migrating SAS Forecast Analyst Workbench 5.1 installed on SAS 9.3 to the second maintenance release of SAS Forecast Analyst Workbench 5.2 installed on the second maintenance release of SAS 9.4. Migrating from SAS 9.3 to the second maintenance release of SAS 9.4 is implicitly performed during this migration.

This information assumes that you are familiar with the SAS 9.4 installation and configuration processes.

Performing Pre-migration Tasks

Prerequisites for Migrating SAS Forecast Analyst Workbench 5.1 to the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2

When you are performing a migration from SAS Forecast Analyst Workbench 5.1 to the second maintenance release of SAS Forecast Analyst Workbench 5.2, the following prerequisites apply:

- Review the system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2. The detailed system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2 in distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrsr/67819/HTML/default/index.html>.

The detailed system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2 in non-distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrndmsr/67820/HTML/default/index.html>.

- Install SAS Intelligence Platform. For more information about installing SAS Intelligence Platform, see *SAS Intelligence Platform: Installation and Configuration Guide* at <http://support.sas.com/documentation/cdl/en/biig/63852/PDF/default/biig.pdf>.
- Ensure that you comply with the SAS 9.4 system requirements. For more requirements information, see “SAS 9.4 System Requirements” at <http://support.sas.com/resources/sysreq/index.html>.
- Ensure that the operating system users and groups that exist in the source machine also exist on the target machine in order to maintain the consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data* and UIART.

Update the Migration Properties File

To update the migration utility properties file:

- 1 Make a copy of the `smu.properties.template` file (that is available at *SAS Software Depot*/utilities/smu93) and save the copy with the name `smu.properties` at the same location.
- 2 Edit the `smu.properties` file:
 - a Provide the following details:
 - a valid path for `SMU.data.dbms.jdbc.jar.dir` to where the JAR file is available on the Windows or UNIX system
 - a user name and password for the MySQL database administrator in the `SMU.data.dbms.admin.userid` and `SMU.data.dbms.admin.passwd` properties respectively

The following code explains the `smu.properties` file.

```
# MySQL JDBC properties for the database administrative user.
# All are required for SAS Forecast Analyst Workbench migration to 5.2+.
SMU.data.dbms.jdbc.jar.dir=C:\\TestSetup\\SAS Install\\Misc
SMU.data.dbms.admin.userid=sqladmin
## Required by SAS Financial Management, as well.
SMU.data.dbms.admin.passwd=<Password>

# Optional MySQL JDBC properties for migration
# of SAS Forecast Analyst Workbench
# to 5.2+.
# These may be used if there have been changes since
# the last configuration by
# the SAS Deployment Wizard.
# SMU.faw.database.host=localhost
# SMU.faw.database.port=3306
# SMU.faw.database.name=fawdb
```

Note: Make sure that you retain the double backward slashes (\\) when you update the paths for UNIX and double forward slashes (//) when you update the paths for Windows.

- b Change the values of the following properties according to your deployment.

```
SMU.config.dir=C:\\TestSetup\\SASInstall\\SASConfig\\Lev1
SMU.SASROOT=C:\\TestSetup\\SASInstall\\SASHome\\SASFoundation\\9.3
SMU.SASHOME=C:\\TestSetup\\SASInstall\\SASHome
SMU.host.metadata=<machine name>.<domain name>.com
SMU.port.metadata=8561
SMU.user=sasadm@saspw
SMU.password=<Password>
SMU.Output.Dir=C:\\migrationPackage15Oct
SMU.localhost=<machine name>.<domain name>.com
SMU.scs.url=http://<machine name>.<domain name>.com/SASContentServer/admin
SMU.scs.user=sasadm@saspw
SMU.scs.password=<Password>
SMU.webinfpltfm.dbms.userid=sasadm@saspw
SMU.webinfpltfm.dbms.password=<Password>
SMU.data.dbms.admin.userid=sqladmin
SMU.data.dbms.admin.passwd=<Password>
SMU.data.dbms.jdbc.jar.dir=C:\\TestSetup\\MySQL\\jdbc
SMU.SAS.version=9.3
```

Note: If the properties are commented, uncomment them by removing the hash sign (#) from the beginning of the line.

CAUTION! You should encrypt any passwords that are used in a migration utility properties file. The migration utility supports the {sas002} method through PROC PWENCODE. For more information, see “PWENCODE Procedure” in *Base SAS Procedures Guide*.

Migrating SAS Forecast Analyst Workbench 5.1 to the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2

Create a Migration Package

On the source machine that contains SAS Forecast Analyst Workbench 5.1, run the SAS Migration Utility. For instructions on how to run the SAS Migration Utility, see *SAS 9.4 Intelligence Platform: Migration Guide*. The guide is available at <http://support.sas.com/documentation/cdl/en/bimig/63853/HTML/default/viewer.htm>.

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

The SAS Migration Utility also generates a report (FullReport.html) that shows whether the migration package was created successfully.

The report is generated at the following location:

- **On Windows:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/
- **On UNIX:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/

Deploy the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 By Using the Migration Package

In order to deploy the second maintenance release of SAS Forecast Analyst Workbench 5.2 by using the migration package, ensure that you choose the following settings in SAS Deployment Wizard:

- select **Custom Configuration**
- select the **Perform Migration** check box, and then specify the path of the migration package that you created
- select **SASApp** as a server context when you are prompted

The migration handles the data migration from SAS Forecast Analyst Workbench 5.1 to the second maintenance release of SAS Forecast Analyst

Workbench 5.2 format. This includes data transformations to be made on SAS data and converting the MySQL tables to PostgreSQL tables.

Performing Post-migration Tasks

About Post-Migration Tasks

Immediately after you perform the migration of SAS Forecast Analyst Workbench 5.1 to the second maintenance release of SAS Forecast Analyst Workbench 5.2, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Forecast Analyst Workbench 5.2: Administrator's Guide, Second Edition*.

The post-migration tasks are described in detail in this chapter.

Note: After you perform the post-migration tasks, you must restart all SAS servers.

Create a SAS Forecast Analyst Workbench User

Create the solution-specific operating system user that existed on the source machine. On Windows, this user must be a member of the SAS Server Users group. On UNIX, this user must be a member of the group that the installation user belongs to.

For more information about users and groups, see “Setting Up Users, Groups, and Ports” in *SAS Intelligence Platform: Installation and Configuration Guide*. The document is available at <http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm>.

Assign Users Permissions on Windows

On Windows, the users who are using SAS Forecast Analyst Workbench must exist as operating system users or must be a part of the domain of the server. You must assign the users Read, Write, and Modify permissions for the following folders on Windows:

- the SAS Forecast Analyst Workbench data folder that is referenced in the `GL_DATA_STORAGE_PATH` configuration parameter
- the SAS Forecast Analyst Workbench archive folder that is referenced in the `GL_DDF_ARCHIVE_ROOT_DIR_PATH` configuration parameter
- the forecasting-related logs folder that is referenced in the `GL_FORECAST_LOG_PATH` configuration parameter
- the SAS Forecast Analyst Workbench logs folder that is referenced in the `GL_DDCF_LOG_PATH` configuration parameter
- the SAS Financial Management data folder that is located at `SAS-configuration-directory/Levn/SASApp/Data`

Note: If you are not using collaboration planning, you do not need to provide permission to this folder.

Note: The element *SAS-configuration-directory* represents the default SAS configuration directory. For example, on a Windows machine, this location can be `C:\SAS\Config\Lev1`. If your SAS configuration directory is in a different location, update this path accordingly.

Assign Users Permissions on UNIX

In a UNIX operating environment, you must update several SAS script files. Updating the files ensures that SAS users have the necessary Write permissions to the tables that the SAS Workspace Server and the SAS Stored Process Server create.

Specify a umask setting of at least 002 in the following SAS scripts:

- *SAS-configuration-directory*/Levn/SASApp/BatchServer/sasbatch_usermods.sh
- *SAS-configuration-directory*/Levn/SASApp/PooledWorkspaceServer/PooledWorkspaceServer_usermods.sh
- *SAS-configuration-directory*/Levn/SASApp/StoredProcessServer/StoredProcessServer_usermods.sh
- *SAS-configuration-directory*/Levn/SASApp/WorkspaceServer/WorkspaceServer_usermods.sh

After you specify the umask setting, you must restart the object spawner.

Update SAS Metadata User Groups

The SAS Forecast Analyst Workbench 5.1 groups are migrated to the second maintenance release of SAS Forecast Analyst Workbench 5.2 environment. However, you must add the members of the SAS Forecast Analyst Workbench 5.1 groups to the second maintenance release of SAS Forecast Analyst Workbench 5.2 groups.

To update the user groups:

- 1 Add the members of the SAS Forecast Analyst Workbench 5.1 groups to the second maintenance release of SAS Forecast Analyst Workbench 5.2 groups.

The following table helps you map the second maintenance release of SAS Forecast Analyst Workbench 5.2 groups with standard SAS Forecast Analyst Workbench 5.1 groups.

Table 3.1 Mapping of User Groups

SAS Forecast Analyst Workbench 5.1 Groups	Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 Groups
Analyst	Forecast Analyst Analysis Users
Planning	Forecast Analyst Planning Users
-	Forecast Analyst Process Administration Users

SAS Forecast Analyst Workbench 5.1 Groups	Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 Groups
ETL Users	Forecast Analyst ETL Users
Forecast Analyst — MSOL Users Group	Forecast Analyst Database Users

- 2 Run `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave11 (Migration)/faw_1101_data_migration` through SAS Data Integration Studio.

The migration job performs the following tasks:

- transforms the data structures of SAS Forecast Analyst Workbench 5.1 to the second maintenance release of SAS Forecast Analyst Workbench 5.2
 - updates the mapping of users and groups in the migrated environment with the data in the solution
- 3 Authorize the second maintenance release of SAS Forecast Analyst Workbench 5.2 groups to the smart objects if you had provided authorization to the corresponding SAS Forecast Analyst Workbench 5.1 groups.

For more information, see “Assigning Permissions to a User or Group for a Forecast, for a Modeling Project, or for a Plan” in *SAS Forecast Analyst Workbench: Administrator’s Guide, Second Edition*.

- 4 Delete the SAS Forecast Analyst Workbench 5.1 groups.

Update the CONFIG.DIM_TABLE_LIST and CONFIG.TIME_DIM_HIERARCHY_LVL Tables

To update the CONFIG.DIM_TABLE_LIST and CONFIG.TIME_DIM_HIERARCHY_LVL tables after migration:

- 1 ■ Edit the PROD_SUCC_IND and ORDER_DIM columns of the CONFIG.DIM_TABLE_LIST table to meet your business requirements.
After migration is performed, the PROD_SUCC_IND and ORDER_DIM columns are added to the CONFIG.DIM_TABLE_LIST table. The PROD_SUCC_IND column is used for product succession in the Administration workspace in the user interface. By default, the PROD_SUCC_IND column is set to 1. The ORDER_DIM column contains the order in which the dimensions are displayed in the user interface while relationships are added in the Administration workspace. By default, the ORDER_DIM column contains values taken from DIM_RK.

Edit the PROD_SUCC_IND and ORDER_DIM columns of the CONFIG.DIM_TABLE_LIST table.

After migration, ensure that the PROD_SUCC_IND and ORDER_DIM columns contain values that meet your business requirement. For more information about the CONFIG.DIM_TABLE_LIST table, see *SAS Forecast Analyst Workbench: Administrator’s Guide*.

- Edit the DEFAULT_PAST_PERIODS and DEFAULT_FUTURE_PERIODS columns of the CONFIG.TIME_DIM_HIERARCHY_LVL table to meet your business requirements.

After migration is performed, the DEFAULT_PAST_PERIODS and DEFAULT_FUTURE_PERIODS columns are added to the CONFIG.TIME_DIM_HIERARCHY_LVL table. The DEFAULT_PAST_PERIODS column contains a default number of history periods to consider for collaboration planning. The DEFAULT_FUTURE_PERIODS column contains a default number of future periods to consider for collaboration planning.

After migration, the DEFAULT_PAST_PERIODS and DEFAULT_FUTURE_PERIODS columns contain the following values by default:

Hierarchy level periodicity	History periods (in terms of the hierarchy level periodicity)	Future periods (in terms of the hierarchy level periodicity)
CAL_YR (Year)	3	3
CAL_QTR (Quarter)	12	12
CAL_MTH (Month)	12	12
CAL_DAY (Day)	12	12
CAL_WK (Week)	12	12

Note: The history periods and future periods must be defined for all hierarchy level periodicities.

2 Run the following SAS Data Integration Studio jobs:

- `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave02`
- `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave03`

Ensure that the changes that you make in the configuration tables are reflected in the tables for the second maintenance release of SAS Forecast Analyst Workbench 5.2. For more information about the ongoing jobs, see *SAS Forecast Analyst Workbench: Administrator's Guide, Second Edition*.

Update SAS Forecast Studio Projects in the Migrated Environment

For the SAS Forecast Studio projects to be migrated to the second maintenance release of SAS Forecast Analyst Workbench 5.2 environment from the SAS Forecast Analyst Workbench 5.1 environment, you need to perform following steps:

- 1** As a system administrator, register SAS Forecast Studio 13.2 in the second maintenance release of SAS Forecast Analyst Workbench 5.2 environment:

- a Log on to SAS Management Console as a user who can register SAS Forecast Studio 13.2.
 - b On the **Plug-ins** tab, select **Application Management** ► **Forecast Server** ► **FAW**.
 - c Right-click **FAW**, and select **Unregister**. The FAW environment unregisters.
 - d Right-click **Forecast Server**, and select **Register Environment**. The **Register Environment** dialog box appears.
 - e In the **Register Environment** dialog box, enter the following information:
 - specify the environment name as **FAW**
 - specify the host name as **SASApp - Logical Workspace Server**
 - specify the location as **SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data/FS_PROJ**
 - specify reports folder as **/System/Applications/SAS Forecast Server/Forecast Server 13.2**

Ensure that this path is the path that is specified in the `GL_FS_PROJ_REPO_PATH` and `GL_FS_PROJ_DATA_STORAGE_PATH` parameters. For more information, see *SAS Forecast Analyst Workbench: Administrator's Guide, Second Edition*.
 - f Click **OK**.
- 2 As a forecast analyst, depending on the independent variables that were a part of the plan created in SAS Forecast Analyst Workbench 5.1, perform the one of the following actions:
- Suppose the plan in SAS Forecast Analyst Workbench 5.1 did not contain independent variables. For such a plan, the SAS Forecast Studio project was created in SAS Forecast Analyst Workbench 5.1. This SAS Forecast Studio project is migrated to modeling project in the second maintenance release of SAS Forecast Analyst Workbench 5.2. You do not need to take any additional action for this plan.
 - Suppose the plan in SAS Forecast Analyst Workbench 5.1 contained independent variables. For such a plan, the SAS Forecast Studio project was created in SAS Forecast Analyst Workbench 5.1. This SAS Forecast Studio project is not migrated to modeling project in the second maintenance release of SAS Forecast Analyst Workbench 5.2. You must re-create the modeling project in the second maintenance release of SAS Forecast Analyst Workbench 5.2.

Note: The **Details** pane of the Forecasts category displays whether the selected forecast contains independent variables.

Events That Contain Missing Data

When both the `_KEYNAME_` and `_STARTDATE_` columns in the `CONFIG.CREATE_EVENT` table contain missing values, the respective event record is deleted from `CONFIG.CREATE_EVENT` and `CONFIG.EVENT_REQUIRED` tables. Such types of event records are stored in

the CONFIG.MIGRATION_EXCEPTION_EVENTS and CONFIG.MIGRATION_EXCEPTION.EVENTS_REQD tables, respectively, for your reference.

Remove Consensus Plans

The consensus plans that were created in SAS Forecast Analyst Workbench 5.1 cannot be migrated to the second maintenance release of SAS Forecast Analyst Workbench 5.2. However, you must remove the data for the consensus plan that was created through SAS Forecast Analyst Workbench 5.1 in SAS Financial Management in order for the collaboration process to run smoothly in the second maintenance release of SAS Forecast Analyst Workbench 5.2.

To remove the consensus plans data from SAS Financial Management:

- 1 In SAS Financial Management, remove the data for each consensus plan. You can delete the data of the consensus plan in the following sequence:
 - 1 form set
 - 2 phase
 - 3 model
 - 4 cycle
 - 5 dimensions that were created for SAS Forecast Analyst Workbench 5.1
 - 6 SAS Financial Management stage area (for example, ANALYSIS, ANALYSIS_ASSOC, ANALYSIS_ASSOC_TYPE, ANALYSIS_NLS, GL_ACCOUNT, GL_ACCOUNT_ASSOC, GL_ACCOUNT_ASSOC_TYPE, GL_ACCOUNT_NLS, PRODUCT, PRODUCT_ASSOC, PRODUCT_ASSOC_TYPE, and PRODUCT_NLS)

For more information about deleting the form set and phase, see “Forms and the Forms Workspace” in *SAS Financial Management: Process Administrator's Guide*.

For more information about deleting the cycle, see “Cycles and Cycle Periods” in *SAS Financial Management: Process Administrator's Guide*.

For more information about deleting the model, see “Overview of Models” in *SAS Financial Management: Process Administrator's Guide*.

If the Stakeholder dimension was used previously, ensure that the updated data structure of the Stakeholder dimension is loaded and that all the required columns are populated. For example, at least one stakeholder referenced in the DEFAULT_STAKEHOLDER_IND column can be set to 1 and the other stakeholders must be set to 0.

- 2 Run the ETL jobs in the following sequence to integrate with SAS Financial Management:
 - 1 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave04 (FM Integration - Configuration)/faw_0401_generate_fm_config_tables
 - 2 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/faw_0501_load_fm_stg_config_tables
 - 3 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/faw_0502_load_fm_sdm_data_locale

- 4 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/
faw_0503_create_fm_sdm_dimension_types
 - 5 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave05 (FM Integration - Initial One Time)/faw_0504_create_fm_sdm_dimensions
- 3 After the data is loaded to solution data layer, run the following ongoing jobs to integrate with SAS Financial Management:
- 1 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0601_load_fm_stg_dimensions
 - 2 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0602_load_fm_sdm_users
 - 3 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0603_load_fm_sdm_groups
 - 4 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0604_load_fm_sdm_users_x_groups
 - 5 /Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave06 (FM Integration - Data Loading)/faw_0605_load_fm_sdm_dimensions

For more information about running the ETL jobs, see *SAS Forecast Analyst Workbench: Administrator's Guide, Second Edition*.

Use of Seeding Templates

Do not use the seeding templates that are in the SAS Forecast Analyst Workbench 5.1. Seeding templates for the second maintenance release of SAS Forecast Analyst Workbench 5.2 are located at *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/templates*. You can manually make the changes in seeding templates that are created in the second maintenance release of SAS Forecast Analyst Workbench 5.2 from the seeding the templates that were created for SAS Forecast Analyst Workbench 5.1.

For more information about seeding, see *SAS Forecast Analyst Workbench: Administrator's Guide, Second Edition*.

Update the NPF Projects

When you are migrating the new product forecasting projects to the second maintenance release of SAS Forecast Analyst Workbench 5.2, ensure that you enter the following information in the UIART.PRODUCT_KPI_LIST table:

- information about the user who created the NPF projects in the created_by column
- date on which the NPF project was created and modified in the created_date and modified_date columns respectively

Migrate SAS Forecast Analyst Workbench 5.2 to SAS Forecast Analyst Workbench 5.2 Maintenance 2

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Introduction to Migrating SAS Forecast Analyst Workbench 5.2 to the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2

This chapter explains the tasks for migrating SAS Forecast Analyst Workbench 5.2 to the second maintenance release of SAS Forecast Analyst Workbench 5.2.

This chapter assumes that you are familiar with the SAS 9.4 installation and configuration processes.

Performing Pre-migration Tasks

Prerequisites for Migrating SAS Forecast Analyst Workbench 5.2 to the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2

When you are migrating SAS Forecast Analyst Workbench 5.2 to the second maintenance release of SAS Forecast Analyst Workbench 5.2, the following prerequisites apply:

- Review the system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2. The detailed system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2 in distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrsr/67819/HTML/default/index.html>.

The detailed system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2 in non-distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrndmsr/67820/HTML/default/index.html>.

- Install SAS Intelligence Platform on the target machine. For more information about installing SAS Intelligence Platform, see *SAS Intelligence Platform: Installation and Configuration Guide* at <http://support.sas.com/documentation/cdl/en/biig/63852/PDF/default/biig.pdf>.
- Ensure that you comply with the SAS 9.4 system requirements. For more requirements information, see “SAS 9.4 System Requirements” at <http://support.sas.com/resources/sysreq/index.html>.
- Ensure that the operating system users and groups that exist on the source machine also exist on the target machine in order to maintain the consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data* and UIART.

Update the Migration Properties File

To update the migration utility properties file:

- 1 Make a copy of the `smu.properties.template` file (that is available at `<SAS Software Depot>/utilities/smu94`) and save the copy with the name `smu.properties` at the same location.
- 2 Edit the `smu.properties` file according to your deployment:

```
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=<machine name>.<domain name>.com
SMU.port.metadata=8561
```

```
SMU.user=sasadm@saspw
SMU.password=<Password>
SMU.Output.Dir=C:\\migrationPackage30Oct2014
SMU.localhost=<machine name>.<domain name>.com
SMU.scs.url=http://<machine name>.<domain name>/SASContentServer/admin
SMU.scs.user=sasadm@saspw
SMU.scs.password=<Password>
SMU.webinfpltfm.dbms.userid=SharedServices
SMU.webinfpltfm.dbms.password=<Password>
SMU.webapp.bisrvmid.dbms.userid=vatadm
SMU.webapp.bisrvmid.dbms.password=<Password>
SMU.SAS.version=9.4
```

Note: If the properties are commented, uncomment them by removing the hash sign (#) from the beginning of the line.

CAUTION! You should encrypt any passwords used in a migration utility properties file. The migration utility supports the {sas002} method through PROC PWENCODE. For more information, see “PWENCODE Procedure” in *Base SAS Procedures Guide*.

Migrating SAS Forecast Analyst Workbench 5.2 to the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2

Create a Migration Package

On the source machine that contains SAS Forecast Analyst Workbench 5.2, run the SAS Migration Utility. For instructions on how to run the SAS Migration Utility, see *SAS 9.4 Intelligence Platform: Migration Guide*. The guide is available at <http://support.sas.com/documentation/cdl/en/bimig/63853/HTML/default/viewer.htm>.

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

The SAS Migration Utility also generates a report (FullReport.html) that shows whether the migration package was created successfully.

The report is generated at the following location:

- **On Windows:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/
- **On UNIX:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/

Deploy the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 By Using the Migration Package

In order to deploy the second maintenance release of SAS Forecast Analyst Workbench 5.2 by using the migration package, ensure that you choose the following settings in SAS Deployment Wizard:

- select **Custom Configuration**
- select the **Perform Migration** check box, and then specify the path of the migration package that you created
- select **SASApp** as a server context when you are prompted

Performing Post-migration Tasks

About Post-migration Tasks

Immediately after you perform the migration of SAS Forecast Analyst Workbench 5.2 to the second maintenance release of SAS Forecast Analyst Workbench 5.2, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Forecast Analyst Workbench 5.2: Administrator's Guide, Second Edition*.

The post-migration tasks are described in detail in this chapter.

Note: After you perform the post-migration tasks, you must restart all SAS servers.

Create a SAS Forecast Analyst Workbench User

Create the solution-specific operating system user that existed on the source machine. On Windows, this user must be a member of the SAS Server Users group. On UNIX, this user must be a member of the group that the installation user belongs to.

For more information about users and groups, see “Setting Up Users, Groups, and Ports” in *SAS Intelligence Platform: Installation and Configuration Guide*. The document is available at <http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm>.

Assign Users Permissions on Windows

On Windows, the users who are using SAS Forecast Analyst Workbench must exist as operating system users or must be a part of the domain of the server. You must assign the users Read, Write, and Modify permissions for the following folders on Windows:

- the SAS Forecast Analyst Workbench data folder that is referenced in the `GL_DATA_STORAGE_PATH` configuration parameter

- the SAS Forecast Analyst Workbench archive folder that is referenced in the `GL_DDF_ARCHIVE_ROOT_DIR_PATH` configuration parameter
- the forecasting-related logs folder that is referenced in the `GL_FORECAST_LOG_PATH` configuration parameter
- the SAS Forecast Analyst Workbench logs folder that is referenced in the `GL_DDCF_LOG_PATH` configuration parameter
- the SAS Financial Management data folder that is located at `SAS-configuration-directory/Levn/SASApp/Data`

Note: If you are not using collaboration planning, you do not need to provide permission to this folder.

Note: The element `SAS-configuration-directory` represents the default SAS configuration directory. For example, on a Windows machine, this location can be `C:\SAS\Config\Lev1`. If your SAS configuration directory is in a different location, update this path accordingly.

Assign Users Permissions on UNIX

In a UNIX operating environment, you must update several SAS script files. Updating the files ensures that SAS users have the necessary Write permissions to the tables that the SAS Workspace Server and the SAS Stored Process Server create.

Specify a umask setting of at least 002 in the following SAS scripts:

- `SAS-configuration-directory/Levn/SASApp/BatchServer/sasbatch_usermods.sh`
- `SAS-configuration-directory/Levn/SASApp/PooledWorkspaceServer/PooledWorkspaceServer_usermods.sh`
- `SAS-configuration-directory/Levn/SASApp/StoredProcessServer/StoredProcessServer_usermods.sh`
- `SAS-configuration-directory/Levn/SASApp/WorkspaceServer/WorkspaceServer_usermods.sh`

After you specify the umask setting, you must restart the object spawner.

Run the Migration Job

Run the `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave11 (Migration)/faw_1101_data_migration` job through SAS Data Integration Studio.

The migration job transforms the data structures of SAS Forecast Analyst Workbench 5.2 to the second maintenance release of SAS Forecast Analyst Workbench 5.2.

Update Reports

Update the Library References for Reports Created in SAS Web Report Studio

Suppose you created reports using SAS Web Report Studio in SAS Forecast Analyst Workbench 5.2 and migrated or updated to the second maintenance release of SAS Forecast Analyst Workbench 5.2. In such case, you must update the references of all libraries in the respective SAS Information Maps.

To update the library references for reports created in SAS Web Report Studio:

- 1 In the SAS Information Map Studio, select **File** ► **Open**. In the Open window, select the required data set to open the report.
- 2 In the Selected Resources pane, right-click the report, and select **Resource Replacement**. The Resource Replacement window appears.
- 3 In the left pane of the Resource Replacement window, click **Libraries**.
- 4 In the right pane of the Resource Replacement window, select the replacement library from the list to remove the library reference errors.
- 5 Click **OK**.

After you update the latest names of all libraries, the reports start to work.

Run the ETL Job for Reports Created in SAS Visual Analytics

Suppose you created reports using SAS Visual Analytics in SAS Forecast Analyst Workbench 5.2 and migrated or updated to the second maintenance release of SAS Forecast Analyst Workbench 5.2. In this case, you must run the following job after restarting the SAS LASR Analytic server: `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave10 (VA integration - Data Upload to LASR)/faw_1001_upload_to_LASR`

Update the NPF Projects

When you are migrating the new product forecasting projects to the second maintenance release of SAS Forecast Analyst Workbench 5.2, ensure that you enter the following information in the UIART.PRODUCT_KPI_LIST table:

- information about user who created the NPF projects in the created_by column
- date when the NPF project was created and modified in the created_date and modified_date columns respectively.

Migrate the SAS Forecast Analyst Workbench 5.2 Maintenance 2 to a Target Machine

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Introduction to Migrating the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 to a Target Machine

This chapter explains the tasks for migrating the second maintenance release of SAS Forecast Analyst Workbench 5.2 to a target machine. This chapter assumes that you are familiar with the SAS 9.4 installation and configuration processes.

Performing Pre-migration Tasks

Prerequisites for Migrating the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 to a Target Machine

When you are migrating the second maintenance release of SAS Forecast Analyst Workbench 5.2 to a target machine, the following prerequisites apply:

- Review the system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2. The detailed system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2 in distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrsr/67819/HTML/default/index.html>.

The detailed system requirements for the second maintenance release of SAS Forecast Analyst Workbench 5.2 in non-distributed mode are available at <http://support.sas.com/documentation/installcenter/en/ikforecstanofrndmsr/67820/HTML/default/index.html>.

- Install SAS Intelligence Platform on the target machine. For more information about installing SAS Intelligence Platform, see *SAS Intelligence Platform: Installation and Configuration Guide* at <http://support.sas.com/documentation/cdl/en/biig/63852/PDF/default/biig.pdf>.
- Ensure that you comply with the SAS 9.4 system requirements. For more requirements information, see “SAS 9.4 System Requirements” at <http://support.sas.com/resources/sysreq/index.html>.
- Ensure that the operating system users and groups that exist on the source machine also exist on the target machine in order to maintain the consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASForecastAnalystWorkbench/data* and UIART.

Update the Migration Properties File

To update the migration utility properties file:

- 1 Make a copy of the `smu.properties.template` file (that is available at *<SAS Software Depot>/utilities/smu94*) and save the copy with the name `smu.properties` at the same location.
- 2 Edit the `smu.properties` file according to your deployment:

```
SMU.config.dir=/install/users/cfgsas1/TestSetup/SASInstall/SASConfig/Lev1
SMU.SASHOME=/install/users/cfgsas1/TestSetup/SASInstall/SASHome
SMU.host.metadata=<machine name>.<domain name>.com
SMU.port.metadata=8561
SMU.user=sasadm@saspw
SMU.password=<Password>
SMU.Output.Dir=/install/users/cfgsas1/migrationPackage
SMU.localhost=<machine name>.<domain name>.com
```

```
SMU.scs.url=http://<machine name>.<domain name>.com/SASContentServer/admin
SMU.scs.user=sasadm@saspw
SMU.scs.password=<Password>
SMU.webinfpltfm.dbms.userid=SharedServices
SMU.webinfpltfm.dbms.password=<Password>
SMU.webapp.bisrvmid.dbms.userid=vatadm
SMU.webapp.bisrvmid.dbms.password=<Password>
SMU.cleartext.password.is_allowed=FALSE
SMU.SAS.version=9.4
```

Note: If the properties are commented, uncomment them by removing the hash sign (#) from the beginning of the line.

CAUTION! You should encrypt any passwords that are used in a migration utility properties file. The migration utility supports the {sas002} method through PROC PWENCODE. For more information, see “PWENCODE Procedure” in *Base SAS Procedures Guide*.

Migrating the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 to a Target Machine

Create a Migration Package

On the source machine that contains the second maintenance release of SAS Forecast Analyst Workbench 5.2, run the SAS Migration Utility. For instructions on how to run the SAS Migration Utility, see *SAS 9.4 Intelligence Platform: Migration Guide*. The guide is available at <http://support.sas.com/documentation/cdl/en/bimig/63853/HTML/default/viewer.htm>.

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

The SAS Migration Utility also generates a report (FullReport.html) that shows whether the migration package was created successfully.

The report is generated at the following location:

- **On Windows:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/
- **On UNIX:** <Output path specified in the `smu.properties` file>/<machine name>/AnalysisReport/

Deploy the Second Maintenance Release of SAS Forecast Analyst Workbench 5.2 By Using the Migration Package

In order to deploy the second maintenance release of SAS Forecast Analyst Workbench 5.2 by using the migration package, ensure that you choose the following settings in SAS Deployment Wizard:

- select **Custom Configuration**
- select the **Perform Migration** check box, and then specify the path of the migration package that you created
- select **SASApp** as a server context when you are prompted

Performing Post-migration Tasks

About Post-migration Tasks

Immediately after you perform the migration of the second maintenance release of SAS Forecast Analyst Workbench 5.2 to a target machine, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Forecast Analyst Workbench 5.2: Administrator's Guide, Second Edition*.

The post-migration tasks are described in detail in this chapter.

Note: After you perform the post-migration tasks, you must restart all SAS servers.

Create a SAS Forecast Analyst Workbench User

Create the solution-specific operating system user that existed on the source machine. On Windows, this user must be a member of the SAS Server Users group. On UNIX, this user must be a member of the group that the installation user belongs to.

For more information about users and groups, see “Setting Up Users, Groups, and Ports” in *SAS Intelligence Platform: Installation and Configuration Guide*. The document is available at <http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm>.

Assign Users Permissions on Windows

On Windows, the users who are using SAS Forecast Analyst Workbench must exist as operating system users or must be a part of the domain of the server. You must assign the users Read, Write, and Modify permissions for the following folders on Windows:

- the SAS Forecast Analyst Workbench data folder that is referenced in the `GL_DATA_STORAGE_PATH` configuration parameter
- the SAS Forecast Analyst Workbench archive folder that is referenced in the `GL_DDF_ARCHIVE_ROOT_DIR_PATH` configuration parameter
- the forecasting-related logs folder that is referenced in the `GL_FORECAST_LOG_PATH` configuration parameter
- the SAS Forecast Analyst Workbench logs folder that is referenced in the `GL_DDCF_LOG_PATH` configuration parameter
- the SAS Financial Management data folder that is located at `SAS-configuration-directory/Levn/SASApp/Data`

Note: If you are not using collaboration planning, you do not need to provide permission to this folder.

Note: The element *SAS-configuration-directory* represents the default SAS configuration directory. For example, on a Windows machine, this location can be `C:\SAS\Config\Lev1`. If your SAS configuration directory is in a different location, update this path accordingly.

Assign Users Permissions on UNIX

In a UNIX operating environment, you must update several SAS script files. Updating the files ensures that SAS users have the necessary Write permissions to the tables that the SAS Workspace Server and the SAS Stored Process Server create.

Specify a umask setting of at least 002 in the following SAS scripts:

- *SAS-configuration-directory/Levn/SASApp/BatchServer/sasbatch_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/PooledWorkspaceServer/PooledWorkspaceServer_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/StoredProcessServer/StoredProcessServer_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/WorkspaceServer/WorkspaceServer_usermods.sh*

After you specify the umask setting, you must restart the object spawner.

Update the PLAN_DETAILS Table in the UIART Library

If a forecast is scheduled to run in batch mode on a source machine, delete the next scheduled run date and time value of that forecast from the SCHEDULE_NEXT_RUN_DTTM column of the UIART.PLAN_DETAILS table on the target machine.

Update SAS Forecast Analyst Workbench 5.2 to SAS Forecast Analyst Workbench 5.2 Maintenance 2

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Introduction to Updating SAS Forecast Analyst Workbench

You can update previously installed version of SAS Forecast Analyst Workbench, that is, SAS Forecast Analyst Workbench 5.2 to the second maintenance release of SAS Forecast Analyst Workbench 5.2.

This chapter provides complete information about updating SAS Forecast Analyst Workbench.

Pre-update Tasks

Before you update SAS Forecast Analyst Workbench to the second maintenance release of SAS Forecast Analyst Workbench 5.2, you must perform the following tasks:

- assess the effect of update on products at your site

Assessing the effect of update on products at your site includes reviewing the list of products that will be updated on a machine. From SAS Deployment

Wizard, generate a list of the product updates that SAS will apply to the current machine. This list of product updates could vary for each machine at your site.

- make backups

Make a backup of the database and UIART, metadata (including the users that you created), and any customizations that you might have created.

For more information about the pre-update tasks, see “Preparing Your Site for a Software Update” in *SAS 9.4 Guide to Software Updates* at <http://support.sas.com/documentation/cdl/en/whatsdiff/66129/PDF/default/whatsdiff.pdf>.

Updating SAS Forecast Analyst Workbench

You use the SAS Deployment Wizard to update SAS Forecast Analyst Workbench and related products that are included in your deployment plan. Depending on your SAS software order, the SAS installation data file, and the deployment plan, SAS Deployment Wizard prompts you to update SAS Forecast Analyst Workbench and other related products.

Perform the SAS Deployment Wizard tasks in order to update and configure SAS Forecast Analyst Workbench to the second maintenance release of SAS Forecast Analyst Workbench 5.2.

For more information, see *SAS 9.4 Guide to Software Updates* at <http://support.sas.com/documentation/cdl/en/whatsdiff/66129/PDF/default/whatsdiff.pdf>.

Performing Post-Update Tasks

Verify Permissions on Windows for Users

On Windows, the users who are using SAS Forecast Analyst Workbench must exist as operating system users or must be a part of the domain of the server. You must verify that the users have Read, Write, and Modify permissions for the following folders on Windows:

- the SAS Forecast Analyst Workbench data folder that is referenced in the `GL_DATA_STORAGE_PATH` configuration parameter
- the SAS Forecast Analyst Workbench archive folder that is referenced in the `GL_DDF_ARCHIVE_ROOT_DIR_PATH` configuration parameter
- the forecasting-related logs folder that is referenced in the `GL_FORECAST_LOG_PATH` configuration parameter
- the SAS Forecast Analyst Workbench logs folder that is referenced in the `GL_DDCF_LOG_PATH` configuration parameter
- the SAS Financial Management data folder that is located at `SAS-configuration-directory/Levn/SASApp/Data`

Note: If you are not using collaboration planning, you do not need to provide permission to this folder.

Note: The element *SAS-configuration-directory* represents the default SAS configuration directory. For example, on a Windows machine, this location can be `C:\SAS\Config\Lev1`. If your SAS configuration directory is in a different location, update this path accordingly.

Verify Permissions on UNIX for Users

In a UNIX operating environment, you must update several SAS script files. Updating the files ensures that SAS users have the necessary Write permissions to the tables that the SAS Workspace Server and the SAS Stored Process Server create.

Specify a umask setting of at least 002 in the following SAS scripts:

- *SAS-configuration-directory/Levn/SASApp/BatchServer/sasbatch_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/PooledWorkspaceServer/PooledWorkspaceServer_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/StoredProcessServer/StoredProcessServer_usermods.sh*
- *SAS-configuration-directory/Levn/SASApp/WorkspaceServer/WorkspaceServer_usermods.sh*

After you specify the umask setting, you must restart the object spawner.

Update Data Structures

After performing any manual steps that are mentioned in the `UpdateInstructions.html`, run the `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave11 (Migration)/faw_1101_data_migration` job through SAS Data Integration Studio. The job transforms the data structures to those of the second maintenance release of SAS Forecast Analyst Workbench 5.2.

Update Reports

Update the Library References for Reports Created in SAS Web Report Studio

Suppose you created reports using SAS Web Report Studio in SAS Forecast Analyst Workbench 5.2 and updated to the second maintenance release of SAS Forecast Analyst Workbench 5.2. In such case, you must update the references of all libraries in the respective SAS Information Maps.

To update the library references for reports created in SAS Web Report Studio:

- 1 In the SAS Information Map Studio, select **File** ► **Open**. In the **Open** window, select the required data set to open the report.
- 2 In the Selected Resources pane, right-click the report, and select **Resource Replacement**. The Resource Replacement window appears.

- 3 In the left pane of the Resource Replacement window, click **Libraries**.
- 4 In the right pane of the Resource Replacement window, select the replacement library from the list to remove the library reference errors.
- 5 Click **OK**.

After you update the latest names of all libraries, the reports start to work.

Run ETL Job for Reports Created in SAS Visual Analytics

Suppose you created reports using SAS Visual Analytics in SAS Forecast Analyst Workbench 5.2 and updated to the second maintenance release of SAS Forecast Analyst Workbench 5.2. In such case, you must run the following job after you restart the SAS LASR Analytic server: `/Products/SAS Forecast Analyst Workbench/5.2 Jobs/Wave10 (VA integration - Data Upload to LASR)/faw_1001_upload_to_LASR`

Update the NPF Projects

When you are upgrading to the second maintenance release of SAS Forecast Analyst Workbench 5.2, ensure that you enter the following information in the UIART.PRODUCT_KPI_LIST table:

- information about the user who created the NPF projects in the `created_by` column
- date on which the NPF project was created and modified in the `created_date` and `modified_date` columns respectively

Recommended Reading

- *SAS Forecast Analyst Workbench 5.2: User's Guide, Second Edition*
- *SAS Forecast Analyst Workbench 5.2: Administrator's Guide, Second Edition*
- *SAS Forecast Analyst Workbench 5.2: Data Reference Guide, Second Edition*

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