

SAS[®] Financial Management 5.3 Migration Guide



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SAS® Financial Management 5.3: Migration Guide

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Information about This Book

Terms and Conventions

This book uses the following terms and conventions:

Convention	Description
data tier	The machine on which you install the data-tier software for SAS Financial Management.
metadata tier	The machine on which you installed the SAS Metadata Server. Usually, this is the same machine as the data tier.
middle tier	The machine on which you installed the Web application server and on which your Web applications run.
single-tier installation	An installation that is done on one machine. In that case, the single machine functions as both the data tier and the middle tier. Follow instructions for both the data tier and the middle tier.
multi-tier installation	An installation that is done on more than one machine (for example, with a data tier and a middle tier).
<i>SAS-config-dir</i>	The path to the SAS configuration directory in the operating system. Examples: C:\SAS\Config (Windows) or /usr/local/SAS/Config (UNIX).
<i>MySQL-install-dir</i>	The path to the MySQL installation directory. For example, C:\MySQL\bin (Windows) or /usr/local/mysql (UNIX)

Chapter 1

Introduction

About This Book	1
Important Assumptions	1
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About This Book

This book applies to release 5.3 of SAS Financial Management. It describes the migration approach for the following scenarios:

- migrating from SAS 9.1.3 to SAS 9.3
- migrating from SAS 9.2 to SAS 9.3
- migrating from SAS 9.3 to SAS 9.3

Note: Migration of SAS Strategy Management or SAS Human Capital Management is not covered in this document.

The migration includes both configuration and content. Some limitations apply to migrating content.

If you are performing a migration, begin with this document. Refer also to the documents listed in [“References” on page 2](#).

Important Assumptions

This document is written with the following assumptions:

- You have prepared for a standard installation (such as installing required third-party applications, planning which tiers are going to be installed on which machines, and so on).

See the “Pre-Installation Steps” in the *Installation Instructions for SAS Financial Management Release 5.3*. For migration-specific information about external accounts, see the following references:

- (migrations from SAS 9.1.3) [“Create Operating System Accounts” on page 5](#)

- (migrations from SAS 9.2) “Create Operating System Accounts” on page 11
- You have prepared a software depot and an installation plan file.

Important Features and Restrictions

Be aware of the following features and restrictions:

- **Operating systems.** Migrations must take place on the same platform (Windows or UNIX).

However, you can migrate within the Windows family (for example, Windows 32-bit to Windows 64-bit) or migrate within the UNIX family (for example, Solaris to Linux).
- **Configuration.** Migrations from a previous release must use the same configuration for the old and new systems.
- **Web application server.** With a migration from SAS 9.1.3, SAS 9.2, or SAS 9.3, you can change the configuration from one Web application server to another (for example, from Oracle WebLogic to JBoss).
- **SAS Migration Utility and SAS Deployment Wizard.** You cannot use the SAS Migration Utility and the SAS Deployment Wizard to migrate the SAS Intelligence Platform and then rerun the same software to migrate SAS Financial Management later.
- **Installations prior to SAS Financial Management 4.4.** You cannot migrate installations prior to SAS Financial Management 4.4.
- **New products.** If you are installing new products in addition to migrating old ones, first migrate the X.4 installation. Then install the new products.

References

Refer to the following documents to assist with your installation and migration:

- *Installation Instructions for SAS Financial Management 5.3.* This book contains instructions for installing third-party software, creating users, and installing and configuring the SAS Financial Management software.

It is available at the following site: <http://support.sas.com/documentation/onlinedoc/fm>

Note: This site is password-restricted. You can find the user name and password in the preinstallation checklist or by calling Technical Support.

- *SAS Financial Management: System Administrator's Guide.* This book contains additional configuration and administration information, as well as a list of changes in SAS Financial Management. It is available at the sites listed above.
- *SAS Financial Management: Data Administrator's Guide.* This book contains information about loading and managing data for SAS Financial Management. It is available at the sites listed above.
- For the SAS Intelligence Platform:

- *SAS 9.3 Intelligence Platform: Migration Guide*
- *SAS Intelligence Platform: Installation and Configuration Guide*
- *What's New in SAS 9.3 Intelligence Platform*

These documents (and others) are available at <http://support.sas.com/93administration>.

- *What's New in SAS Information Delivery Portal* , available at <http://support.sas.com/documentation/onlinedoc/portal/index.html>.

Chapter 2

Migration from SAS 9.1.3: Preliminary Tasks

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Introduction

This chapter applies only to migrations from SAS 9.1.3.

Create Operating System Accounts

Required External Accounts

Create the required external accounts in the operating system for the primary users, as listed in your preinstall checklist. External accounts are defined outside the metadata repository (for example, in the operating system).

When performing an installation with migration from SAS 9.1.3, you are given the option of using the new SAS 9.3 internal accounts. We recommend that you take that option.

The following table summarizes the required external accounts and the differences between SAS 9.1.3 and SAS 9.3.

Table 2.1 Required External User Accounts

External Account (SAS 9.1.3)	External Account (SAS 9.3)	Example (SAS 9.3)
SAS Installer	SAS Installer	<i>domain\installer-ID</i>
SAS General Server User	SAS Spawned Servers account	<i>domain\sassrv</i>
SAS Demo User	SAS First User	<i>domain\sasdemo</i>
not applicable	Solutions Host User	<i>domain\sassln</i>

Note:

- The *domain* is not used for UNIX accounts.
- The *sasdemo* account is optional. If you include this identity, it must refer to an external account.

For more information about the account that must be used for installation with migration, see [“The SAS Installer Account” on page 6](#).

Optional External Accounts

The following external accounts are required only if you do not take the internal-account option:

Table 2.2 Optional External User Accounts

External Account (SAS 9.1.3)	External Account (SAS 9.3)	Example (SAS 9.3)
SAS Administrator	SAS Administrator	<i>domain\sasadm</i>
SAS Trusted User	SAS Trusted User	<i>domain\sastrust</i>
Solutions Role Administrator	Solutions Role Administrator	<i>domain\slnadm</i>

Note: The *domain* is not used for UNIX accounts.

The SAS Installer Account

For information about the SAS Installer account, refer to the *Installation Instructions for SAS Financial Management Release 5.3*.

The sasspusr Account Not Needed

SAS 9.1.3 installations of SAS Financial Management required an additional user account, *domain\sasspusr*, for access to the stored process server via the SPAAuth domain. This user account is no longer required. For post-migration instructions, see [“Remove References to sasspusr and SPAAuth” on page 32](#).

Perform Checks Before Running the SAS Migration Utility

Overview

On a single-tier system, perform all the pre-migration checks listed. On a multi-tier system, perform the pre-migration checks on the specified machines.

See also “Performing Pre-migration Tasks” in the *SAS Intelligence Platform: Migration Guide*.

(Data Tier) Check the Required Hot Fix Level

Before you migrate the SAS 9.1.3 environment, make the following checks:

- Check that the metadata server version is 9.1.3SP4. (In an interactive SAS session, look at **Help** ⇒ **About**.)
- Check that hot fix E9BC59 has been applied by confirming the existence of the file `!SASROOT\core\sasinst\hotfix\e9bc59wn.aud`.
- Make sure that you followed the post-installation instructions when you applied the hot fix.

CAUTION:

Be sure to make this update before the migration. If you already performed the migration, you must delete the configuration directories and rerun the configuration pass of SAS Deployment Wizard. If you applied the hot fix but are uncertain as to whether you followed the post-installation steps, follow them now.

If the hot fix has not been applied, download and install the hot fix. Point your browser to the following location: http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#e9bc59 and download the appropriate hot fix for your operating system.

The Readme file includes the post-installation steps.

(Data Tier) Update the Metadata for SAS Data Integration Studio

CAUTION:

Be sure to make this update before the migration. Otherwise, you must delete the configuration directories and rerun the configuration pass of SAS Deployment Wizard.

Before performing a migration, update the metadata for SAS Data Integration Studio on the SAS 9.1.3 data tier:

1. Point your browser to the following SAS Note:
<http://support.sas.com/kb/37/686.html>
2. Download the JAR file and follow the SAS Note instructions.

(Data Tier) Run the Diagnostic Tool

The diagnostic tool ensures that the environment is ready for migration. It also gathers information about the site's stageDDS, DDS, and SASSDM data models and compares them to the corresponding SAS data models. For successful migration, there must be no critical differences between a site's data model and the SAS data model. After running the diagnostic tool, correct any critical differences before continuing the migration.

On the SAS 9.1.3 system, run the diagnostic tool from SAS Data Integration Studio, as follows:

1. In SAS Data Integration Studio, log on to the data tier as a power user (not the unrestricted user). Select the Solutions repository as the default.
2. Select the **Inventory** tab.
3. In the Solutions repository, right-click the **Jobs** folder and select **Import**. Select **SAS_HOME\SASSolutionsServices\1.4\DataTier\Diagnostics\DataModels\chk_dataModels_Job.spk** as the package to import.

Note: Substitute “1.4.1” as the version number if necessary.

4. Open the chk_dataModels job.
5. Open the properties for the chk_dataModels transformation.
6. Select the **Options** tab and set the following options:
 - **Directory (Input):** Directory where the SAS dictionary tables are stored, with names such as dictionary_14.sas7bdat or dictionary_13.sas7bdat. Default values for this directory are as follows:
 - **(Windows)** ..\Program Files\SAS\SASSolutionsServices\1.4\DataTier\Diagnostics\DataModels
 - **(UNIX)** ../SAS/SASSolutionsServices/1.4/DataTier/Diagnostics/DataModels
 - **Directory (Output):** Directory where the HTML output reports are stored. Default values are as follows:
 - **(Windows)** ..\SAS\SASSolutionsConfig\Lev1\Data
 - **(UNIX)** ../SAS/SASSolutionsConfig/Lev1/Data

Keep the default values for the remaining options.

7. Execute the chk_dataModels job.
8. Open the log and check the output files that are produced by the chk_dataModels job. The files are listed at the bottom of the log. Here is an example:

```
NOTE: Check the following html documents:
- C:\SAS\SASSolutionsConfig\Lev1\Data\diff_site_DDS_version
  1.4_09AUG10111604.html
- C:\SAS\SASSolutionsConfig\Lev1\Data\diff_site_STAGEDDS_version
  1.4_09AUG10111604.html
- C:\SAS\SASSolutionsConfig\Lev1\Data\diff_site_SASSDM_version
  1.4_09AUG10111604.html
```

Only tables that differ from the standard model are listed in the report output. If you see a column in the report whose data type and length match the standard model,

then only the label has been changed, and you can ignore the difference. If a column is reported as missing in the site model, it usually results from a difference in case between the column name in the site model and the SAS model. Case differences in column names can be safely ignored. Investigate and correct any other differences to ensure a valid migrated model.

If the HTML files are empty, no differences were found.

Chapter 3

Migration from SAS 9.2: Preliminary Tasks

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Introduction

This chapter applies only to migrations from SAS 9.2 or SAS 9.3.

Create Operating System Accounts

Required External Accounts

Create the required external accounts in the operating system for the primary users, as listed in your preinstall checklist. External accounts are defined outside the metadata repository (for example, in the operating system).

The following table summarizes the external accounts that are required for SAS 9.3.

Table 3.1 *Required External User Accounts*

External Account	Example
SAS Installer	<i>domain\installer-ID</i>
SAS Spawnd Servers account	<i>domain\sassrv</i>
SAS First User	<i>domain\sasdemo</i>
Solutions Host User	<i>domain\sassln</i>

Note:

- The *domain* is not used for UNIX accounts.

- The sasdemo account is optional. If you include this identity, it must refer to an external account.

For more information about the account that must be used for installation with migration, see [“The SAS Installer Account” on page 12](#).

Optional External Accounts

The following external accounts are required only if you do not take the internal-account option:

Table 3.2 Optional External User Accounts

External Account	Example
SAS Administrator	<i>domain\sasadm</i>
SAS Trusted User	<i>domain\sastrust</i>
Solutions Role Administrator	<i>domain\slnadm</i>

Note: The *domain* is not used for UNIX accounts.

The SAS Installer Account

For information about the SAS Installer account, refer to the *Installation Instructions for SAS Financial Management Release 5.3*.

Chapter 4

The Migration Utility

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Introduction

This chapter applies to all migrations. The term “previous release” applies to the system that you are migrating from, whether it is SAS 9.1.3, SAS 9.2, or SAS 9.3.

Installing the SAS Migration Utility

Overview

The SAS Migration Utility is a tool to package content from the previous installation so that it can be migrated to a new SAS 9.3 installation. For more information about the SAS Migration Utility, refer to the *SAS 9.3 Intelligence Platform: Migration Guide* (see [“References” on page 2](#)).

Installing on Windows

To install the SAS Migration Utility on Windows:

1. In the directory where you downloaded the software depot, find the directory named **utilities\smu** (for SAS 9.1.3 migration), **utilities\smu2** (for SAS 9.2), or **utilities\smu3** (for SAS 9.3).

This directory contains the **smu.exe** file, the **smu.properties.template** file, and possibly other files and directories.

2. Copy this directory to a new directory on each of the computers in your previous installation. For example, create **C:\Program Files\SAS\SASMigrationUtility\9.1.3** or **C:\Program Files\SAS\SASMigrationUtility\9.2** and copy the files there.
3. Verify that the 32-bit version of the appropriate JRE is in the system path (and appears before any other JRE). The 64-bit version of the JRE is not supported on Windows.

Installing on UNIX

On UNIX, FTP the files from the depot to a new directory on each of the computers in your previous installation.

Preparing to Run the SAS Migration Utility

The user who runs the SAS Migration Utility must meet these requirements:

Table 4.1 Requirements for Running the SAS Migration Utility

SAS 9.1.3 Migrations	SAS 9.2 or SAS 9.3 Migrations
The user who runs the SAS Migration Utility must be the same account that was used to install SAS 9.1.3. The account must have a corresponding metadata identity.	The user who runs the SAS Migration Utility must have Read permission for data sets that reside under the configuration directory on the original system. Typically, this is the same account that was used to install SAS 9.2 or SAS 9.3.
On Windows, this user must be a member of the Administrators group in the operating system. The Windows PATH must include the mysql\bin folder.	

SAS 9.1.3 Migrations**SAS 9.2 or SAS 9.3 Migrations**

On UNIX, this user's profile must be the same as the SAS profile, including the environment variables for MySQL. Here is an AIX example:

```
# Path to the libdir in your mysql install
MYSQL_LIBDIR=/usr/local/mysql/lib
export MYSQL_LIBDIR

# Path to directory to hold shared library for SAS Access to MySQL
MYSQL_CLIENT_DIR=/usr/local/SAS/libmysql
export MYSQL_CLIENT_DIR

# Set or add to the shared library load path
LIBPATH=$LIBPATH:$MYSQL_CLIENT_DIR
Or
LIBPATH=/usr/lib/:/lib:$MYSQL_CLIENT_DIR
export LIBPATH

# Add mysql/bin to the PATH environment variable
PATH=$PATH:/usr/local/mysql/bin
export PATH
```

Note: Verify that the link-editor for object files, ld, is in the SAS installer's path.

Before running the SAS Migration Utility, follow these steps:

1. Create a shared directory on the network that is available to all of the computers in the installation.

This directory becomes the SAS Migration Utility migration package directory. All SAS Migration Utility output from all computers is stored in this directory.

The user who is performing the migration needs Write access to this directory.

2. On the system to be migrated, do the following:
 - a. Make sure that you have backed up the metadata repository on the system to be migrated.
 - b. On the source machine, make sure that the metadata server is running. Stop the other SAS servers.
 - c. Stop the managed servers of your Web application server.
 - d. Navigate to the directory where you copied the contents of the **utilities\smu** depot directory.
 - e. Copy the smu.properties.template file to smu.properties.
 - f. Edit the smu.properties file with a text editor.

Change property settings as necessary. The comments in the file explain each property that must be set. For more information, refer to the *SAS Intelligence Platform: Migration Guide*.

The smu.properties file is in the Java properties file format. The following format rules are most important to apply when you are editing the smu.properties file:

- Lines that begin with the # character are comments and have no effect.
- Backslash characters (\) must be doubled. For example:

```
C:\\Program Files\\SAS
```

- g. Verify that the password for the MySQL User is set correctly.

- **SAS 9.2 or SAS 9.3:** The password is set in the `SMU.data.dbms.admin.passwd` property in the `smu.properties` file.

Add this property if necessary and enter the password for the MySQL user. The password can be encoded.

This user must have full privileges for MySQL. After installation and configuration, you can remove this user or modify the user's privileges if desired.

- **SAS 9.1.3:** On the data tier of the SAS 9.1.3 system, open the **`SAS-config-dir\mysqldb.properties`** file and look for this line:

```
DBMS_USER_PASSWORD=password
```

For SAS 9.1.3, the SAS Migration Utility cannot process the `DBMS_USER_PASSWORD_E` property in order to get the encoded MySQL password. It can process only the `DBMS_USER_PASSWORD` property containing the clear-text (unencoded) password.

If necessary, add the `DBMS_USER_PASSWORD` property, with a clear-text MySQL password. Save the file.

For security, after SAS Migration utility completes successfully, delete the `DBMS_USER_PASSWORD` line from `mysqldb.properties`. Leave the `DBMS_USER_PASSWORD_E` line in place.

Running the SAS Migration Utility

Overview

On each computer that needs migration, run the migration utility. Begin with the computer that is running the metadata server. Then go on to the next computer that needs migration. Do not run the migration utility on more than one machine at the same time. Do not run the migration utility on client machines.

Note: We strongly recommend that you run the migration utility in Analyze mode first. Check the output for errors and warnings, correct the errors, and re-run the utility to generate the migration package.

Run the SAS Migration Utility in Analyze Mode

The version of the migration utility that you run depends on two things:

- the version of SAS that you are migrating ("Previous SAS Version" in the table below)
- the operating system on the machine that you are migrating from ("Previous Release Operating System")

Use one of the following commands:

SAS 9.1.3 on Windows

```
smu -s -a -properties path-to-property-file -analyze  
[-replace] [-davgtier]
```

SAS 9.2 on Windows 32-bit

```
smu92_32 -properties path-to-property-file -analyze
[-replace]
```

SAS 9.2 on Windows 64-bit

```
smu92_x64 -properties path-to-property-file -analyze
[-replace]
```

SAS 9.3 on Windows 32-bit

```
smu93_32 -properties path-to-property-file -analyze
[-replace]
```

SAS 9.3 on Windows 64-bit

```
smu93_x64 -properties path-to-property-file -analyze
[-replace]
```

SAS 9.1.3 on UNIX

```
./smu.sh -- -properties path-to-property-file -analyze
[-replace] [-davtier]
```

SAS 9.2 on UNIX

```
./smu92 -- -properties path-to-property-file -analyze
[-replace]
```

SAS 9.3 on UNIX

```
./smu93 -- -properties path-to-property-file -analyze
[-replace]
```

Information about the command-line options:

- **smu command:** Use the appropriate version of the smu command. If you are migrating from SAS 9.1.3, be sure to specify the **-s** **-a** options.
- **-properties:** You must specify the full path to the smu.properties file in this option, even if the smu.properties file is in the current directory (the same directory as the smu.exe file). This is because smu.exe is actually a self-extracting archive; it extracts the complete program into a separate temporary directory and runs it from there.

Use double quotation marks if the path includes spaces.

- **-analyze:** Use this option to run the migration utility in analyze mode, without generating the migration package.
- **-replace:** Use this option the second time you run the migration utility, and anytime after that. Otherwise, the utility cannot replace the package or the analysis report.
- **-davtier:** This option applies only to migrations from SAS 9.1.3. For those migrations, specify the -davtier option if this is the computer on which the DAV server is running (either Xythos or Apache). It causes the migration utility to extract any WebDAV content that it locates.

We recommend that you specify this option on the command line rather than in the smu.properties file. That way, you can reuse the properties file without modifying it.

If your WebDAV server is the Xythos Web File Server, you must specify additional properties in the smu.properties file. See the *SAS Intelligence Platform: Migration Guide* for details.

- For more information about migration utility commands, see “Create the Migration Package” in the *SAS Intelligence Platform: Migration Guide*. For more information about the properties file, see “Develop a Common SAS Migration Utility Properties File” in the same book.

Examine the Analysis Report

In the `smu.properties` file, you set the `SMU.Output.Dir` property to point to the SAS Migration Utility migration package directory, the directory under which all migrated content is stored.

In the SAS Migration Utility migration package directory, there is a subdirectory named after each computer on which you ran the utility. Inside this subdirectory are many other subdirectories. Each subdirectory contains backed-up content from a particular SAS product. (Some directories might be empty.)

1. After the SAS Migration Utility finishes running, check the final few lines of output in the command window to determine whether the SAS Migration Utility produced error messages.
2. If the SAS Migration Utility produced error messages, take these steps:
 - a. View the `migrate.log` file in the computer's subdirectory inside the SAS Migration Utility migration package directory to determine the cause of the error.
 - b. Look for and correct any remaining errors. If you have made corrections, rerun the SAS Migration Utility with the **-replace** option.
3. In the subdirectory named `AnalysisReport`, open the `FullReport.html` file and review the messages.

There are migration status messages for each product. This report indicates whether any products must be upgraded or have patches installed before migration can be completed.

4. Run the SAS Migration Utility again after installing any patches.
5. Look for and correct any remaining error messages before continuing.
6. Examine all warning messages.

Warning messages are for informational purposes and are to be expected on most systems. For example, a warning message appears in the Analysis Report for each data directory found in metadata that exists outside of the SAS Configuration directory. If these are needed in the SAS 9.3 installation, migrate them manually.

Note: The `FullReport.html` file shows a failure (✗) for the SAS Metadata Server Product when the SAS Migration Utility is run on any tier other than the metadata server machine.

Create the Migration Package

Run the migration utility again to create the migration package. Use one of the following commands:

SAS 9.1.3 on Windows

```
smu -s -a -properties path-to-property-file -replace  
[-daviert]
```

SAS 9.2 on Windows 32-bit

```
smu92_32 -properties path-to-property-file -replace
```

SAS 9.2 on Windows 64-bit

```
smu92_x64 -properties path-to-property-file -replace
```


SAS 9.3 on Windows 32-bit

```
smu93_32 -properties path-to-property-file -replace
```

SAS 9.3 on Windows 64-bit

```
smu93_x64 -properties path-to-property-file -replace
```

SAS 9.1.3 on UNIX

```
./smu.sh -- -properties path-to-property-file -replace  
[-davtier]
```

SAS 9.2 on UNIX

```
./smu92 -- -properties path-to-property-file -replace
```

SAS 9.3 on UNIX

```
./smu93 -- -properties path-to-property-file -replace
```

For information about the command-line options, see [“Run the SAS Migration Utility in Analyze Mode” on page 16](#).

Check the SAS Migration Utility Migration Package

Check the SAS Migration Utility results as described in [“Examine the Analysis Report” on page 18](#).

On every tier except the middle tier, perform these additional checks to verify that data has been backed up correctly:

1. In the **metadatasrv** subdirectory, verify the existence of these subdirectories: **MetadataRepositories** and **rposmgr**.
2. In the **MetadataRepositories** subdirectory, verify the existence of one subdirectory for each metadata repository.
3. (SAS 9.1.3 migrations only) If the SAS 9.1.3 system uses Xythos, in the **WFS** subdirectory, verify the existence of a subdirectory named **Area1**.

The **Area1** subdirectory should contain the **WFSDump.xml** file as well as several files with names that begin with “X” and end with a number.

4. In the **soldatatier** subdirectory, verify the existence of a **SQL** subdirectory containing a file named **sassdm.sql**.

This file might be large (megabytes or hundreds of megabytes.)

(Data Tier) Modify Data Set Names If Necessary

If the physical names of any custom data sets in the STAGEDDS library begin with “STAGE_”, you must rename them in the SAS Migration Utility (SMU) package before installing the SAS Financial Management 5.3 software. If the physical names of any custom data sets consist of a single letter (such as “a.sasb7dat”), you must rename them (for example, to “aa.sasb7dat”).

Note: These steps apply regardless of whether the prefix is in upper case, lower case, or mixed case.

1. Navigate to the **path-to-SMU-package\data-tier-name\levconfig\levdata\Data** directory. (Depending on your system, **levdata** might be **levconfig1** instead.)

path-to-SMU-package is the directory in which the SAS Migration Utility package was created. ***data-tier-name*** is the name for the data-tier machine.

2. Open the ZIP file in that directory and make the following changes:
 - a. If you find any data sets with a name that begins with “STAGE_”, rename each matching data set to begin with “STG_” (or a similar string) instead.
 - b. If you find any data sets with a name that is a single letter, rename each matching data set so that it has more than one letter in its name.

Chapter 5

Single-Tier Installation and Configuration

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Run the SAS Deployment Wizard

To perform installation and migration for a single-machine system, follow these steps:

1. Read the instructions in this chapter, making note of the specifics that apply to migrations.
2. Then follow the installation steps in the *Installation Instructions for SAS Financial Management Release 5.3*. (See [“References” on page 2](#).)

When you run the SAS Deployment Wizard, make the following selections:

Table 5.1 Explanation of Selected Prompts

Prompt or Type of Input	Notes
Deployment type	Select both Install SAS Software and Configure SAS Software as the deployment type.
Perform migration	<p>When you reach the Migration Information page, select the Perform migration check box.</p> <p>In the SAS Migration Utility Package Directory field, type or navigate to the shared directory in which the SAS Migration Utility stored its output.</p>
Internal accounts	We recommend that you select Use SAS internal accounts when appropriate on the Deployment Accounts wizard page. See “Create Operating System Accounts” on page 5 .
External accounts	<p>When you are asked for the user name and password of an external account, check the domain name prefix carefully to ensure that it is correct for your site. It might still have the domain name prefix from the previous installation.</p> <p><i>Note:</i> MySQL and WebLogic account names are created in MySQL Server and Oracle WebLogic. They are not operating system accounts. Do not add a host name prefix to those account names.</p>

Prompt or Type of Input	Notes
Server context	<p>The SAS Deployment Wizard presents several pages in which you must select the application server context. During migration, the correct application server context might not be selected by default. There is typically a list of server contexts, consisting of the correct new server context as well as all the migrated OLAP server contexts. Choose the correct server context for your site.</p> <p>The default application server context for a system that was originally migrated from SAS 9.1.3 is SASMain.</p> <p>Otherwise, it is SASApp.</p> <p>When you are asked to specify the database type to use for SAS Shared Services, select MySQL.</p>
SAS OLAP Data and Compute Server: Deployment Instance Name	<p>For the primary ODCS deployment instance, do not enter a value for the webapp.odcs.deployment.name prompt. Leave it blank.</p> <p>If you entered a name by mistake and later received errors with SAS Financial Management applications, contact SAS technical support for information about correcting the instance name.</p>

3. Check input before proceeding.

When you see the Deployment Summary page, the deployment wizard has finished collecting installation and configuration input. This is the last opportunity to change any information that you have provided in previous pages before the wizard begins writing to your system.

Before proceeding with the migration, make sure that the input that you have provided to the deployment wizard is correct. Incorrect user input such as user ID and passwords causes all or portions of your migration to fail.

For additional information, refer to the installation guide for the SAS Intelligence Platform. See [“References” on page 2](#).

Next Steps

After running the SAS Deployment Wizard, follow these steps:

- Follow the steps in the `Instructions.html` file.
- Perform the post-migration tasks as described in the chapter that applies to your migration:
 - [Chapter 7, “Migration from SAS 9.1.3: Post-Migration Tasks,” on page 29](#)
 - [Chapter 8, “Migration from SAS 9.2 or SAS 9.3: Post-Migration Tasks,” on page 37](#)
- Install the client applications.

The *Installation Instructions for SAS Financial Management Release 5.3* has information about installing the client applications.

Both pre-5.3 and 5.3 versions of the following client applications can exist on the same machine:

- SAS Financial Management Studio

- SAS Management Console
- SAS Data Integration Studio

However, only one version of the SAS Financial Management Add-In for Microsoft Excel can exist on a machine.

Chapter 6

Multi-Tier Installation and Configuration

Run the SAS Deployment Wizard	25
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Run the SAS Deployment Wizard

For multi-tier installations, follow these instructions:

1. Read the instructions in this chapter, making note of the specifics that apply to migrations.
2. Then follow the installation steps in the *Installation Instructions for SAS Financial Management Release 5.3*. (See [“References” on page 2](#).)

You will run the SAS Deployment Wizard on each tier of the installation, except for client tiers. If the data tier and metadata tier are on different machines, run the SAS Deployment Wizard on the metadata tier first.

When you run the SAS Deployment Wizard, make the following selections as necessary.

Table 6.1 Explanation of Selected Prompts

Prompt or Type of Input	Notes
Deployment type	Select both Install SAS Software and Configure SAS Software as the deployment type.
Perform migration	When you reach the Migration Information page, select the Perform migration check box. In the SAS Migration Utility Package Directory field, type or navigate to the shared directory in which the SAS Migration Utility stored its output.
Internal accounts	We recommend that you select Use SAS internal accounts when appropriate on the Deployment Accounts wizard page. See “Create Operating System Accounts” on page 5 .

Prompt or Type of Input	Notes
External accounts	<p>When you are asked for the user name and password of an external account, check the domain name prefix carefully to ensure that it is correct for your site. It might still have the domain name prefix from the previous installation.</p> <p><i>Note:</i> MySQL and WebLogic account names are created in MySQL Server and Oracle WebLogic. They are not operating system accounts. Do not add a host name prefix to those account names.</p>
Server context	<p>The SAS Deployment Wizard presents several pages in which you must select the application server context. During migration, the correct application server context might not be selected by default. There is typically a list of server contexts, consisting of the correct new server context as well as all the migrated OLAP server contexts. Choose the correct server context for your site.</p> <p>The default application server context for a system that was originally migrated from SAS 9.1.3 is SASMain.</p> <p>Otherwise, it is SASApp.</p> <p>When you are asked to specify the database type to use for SAS Shared Services, select MySQL.</p>
SAS OLAP Data and Compute Server: Deployment Instance Name	<p>For the primary ODCS deployment instance, do not enter a value for the webapp.odcs.deployment.name prompt. Leave it blank.</p> <p>If you entered a name by mistake and later received errors with SAS Financial Management applications, contact SAS technical support for information about correcting the instance name.</p>

3. Check input before proceeding.

When you see the Deployment Summary page, the deployment wizard has finished collecting installation and configuration input. This is the last opportunity to change any information that you have provided in previous pages before the wizard begins writing to your system.

Before proceeding with the migration, make sure that the input that you have provided to the deployment wizard is correct. Incorrect user input such as user ID and passwords causes all or portions of your migration to fail.

Next Steps

Follow these steps:

1. Follow the steps in the Instructions.html file.
2. Perform the post-migration tasks as described in the chapter that applies to your migration:
 - [Chapter 7, “Migration from SAS 9.1.3: Post-Migration Tasks,” on page 29](#)
 - [Chapter 8, “Migration from SAS 9.2 or SAS 9.3: Post-Migration Tasks,” on page 37](#)
3. Install the client applications.

The *Installation Instructions for SAS Financial Management Release 5.3* has information about installing the client applications.

Both pre-5.3 and 5.3 versions of the following client applications can exist on the same machine:

- SAS Financial Management Studio
- SAS Management Console
- SAS Data Integration Studio

However, only one version of the SAS Financial Management Add-In for Microsoft Excel can exist on a machine.

Chapter 7

Migration from SAS 9.1.3: Post-Migration Tasks

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Overview

This chapter applies to migrations from SAS 9.1.3. It describes tasks that must be performed after the installation and migration steps are complete. Completing the tasks in this chapter requires the following:

- access to SAS Management Console in the SAS 9.3 installation.
- access to SAS Data Integration Studio in the SAS 9.3 installation. Running these SAS Data Integration Studio jobs requires the following group and role memberships:
 - SASSDM MySQL Users group
 - Financial Management: Process Administrator role

A user with this role has all the Financial Management capabilities. If this user does not need the full set of capabilities after the installation is complete, you can later edit the user properties in SAS Management Console.

Note: Do not connect as the unrestricted user. The unrestricted user cannot start a workspace server session.

Apply File Permissions

Before performing any of the remaining post-migration tasks, apply file permissions as described in “Secure Your Installation” in the *SAS Financial Management: System Administrator’s Guide*. Otherwise, some tasks in this chapter will fail.

In particular, apply the following file permissions to the **SAS-config-dir** \Lev1\SASMain\Data directory and its subdirectories:

Table 7.1 File Permissions

Operating System	Permissions
Windows	<ul style="list-style-type: none"> Grant Full Control to SAS General Server User (sassrv). Grant Read/Write/Modify permission to users who run ETL or SAS jobs to update data in the warehouse. These users should include the Solutions Host User.
UNIX	Permit full access for the sas user ID and the sas user group.

For information about the repositories, folders, and libraries in a migrated system, see “Understanding the Migrated System” on page 41.

Migrate SAS Data Sets from 32-Bit to 64-Bit Microsoft Windows

Note: This section applies only if you are migrating from 32-bit to 64-bit Microsoft Windows.

During migration, libraries that are located under the **SAS-config-dir** directory are automatically converted from 32-bit format to 64-bit format. This includes the StageFM library, which is new for SAS Financial Management 5.3 and replaces both the DDS and StageDDS libraries.

However, after migration is complete, you must use PROC MIGRATE to manually convert data sets in any SAS libraries that are not located under the **SAS-config-dir**. For more information, see the SAS Note at <http://support.sas.com/kb/37/695.html>

(Optional) Modify Conform Library

In SAS Financial Management 5.3, by default the Conform library points to the same location as the StageFM library: **SAS-config-dir**\Lev1\SASMain\Data\FinancialManagement\StageFM.

If you do not want to use a separate conform area, skip the rest of this section.

If you want to create a separate conform area, you must modify the Conform LIBNAME statement, and you might need to upgrade its data sets. Follow these steps:

1. In the file system, create a **ConformedDataMart** directory under *SAS-config-dir\Lev1\SASMain\Data\FinancialManagement*.
2. Prepend the path for the **ConformedDataMart** to the Conform LIBNAME statement:
 - a. On the **Plug-ins** tab of SAS Management Console, navigate to **Environment Management** ⇒ **Data Library Manager** ⇒ **Libraries**.
 - b. Right-click **Conform** and open its properties.
 - c. On the **Options** tab, add *SAS-config-dir\Lev1\SASMain\Data\FinancialManagement\ConformedDataMart* to the **Path Specification**.

Replace *SAS-config-dir* with the path to your site's configuration directory. If necessary, use the up or down arrows so that this path precedes the path to the StageFM library.
3. If your site does not need the Conform data from the previous installation: Copy the StageFM data sets to the *SAS-config-dir\Lev1\SASMain\Data\FinancialManagement\ConformedDataMart* folder, replacing all the data sets in that folder. Skip the last step.
4. If your site does need the Conform data from the previous installation:
 - a. Manually upgrade the ConformedDataMart data sets to match the StageFM data model. If a StageFM data set contains one or more columns that are not present in the corresponding ConformedDataMart data set, add those columns to the ConformedDataMart data set.
 - b. If the tables are registered in the metadata repository: in SAS Data Integration Studio, navigate to the Conform library. With the table names selected, right-click and select **Update Metadata**.

For more information, see “Appendix 2: The Conform Area” in the *SAS Financial Management: Data Administration Guide*.

Migrate Additional Libraries

SAS libraries that were in locations outside the configuration directory were not automatically migrated. For more information, see “Migrating Content Stored Outside of the SAS Configuration Directory” in the *SAS 9.3 Intelligence Platform: Migration Guide*.

Load Dimension Type Table

Load the StageFM Dimension Type table, using the solnsvc_0200_load_stagefm_dimension_type_table job. This job is located in the */Products/SAS Financial Management/5.3 Jobs* folder.

Before executing the job, review it to make sure that all source-to-target mappings are correct. Review the mapping in each transformation that is used by the job and propagate or map columns as necessary.

Update the Conform Folder Permissions

Follow these steps:

1. Open the SAS Management Console as the unrestricted user (sasadm).
 2. On the **Plug-ins** tab, select the **Foundation** repository.
 3. Select **Environment Management** ⇒ **User Manager**.
 4. Right-click the SAS Administrators group and select **Properties**.
 5. On the **Members** tab, add Solutions Role Administrator as a member.
 6. Save your changes.
 7. On the **Folders** tab of SAS Management Console, navigate to the **Products/SAS Financial Management** folder.
 8. Right-click the **Conform** folder and select **Properties**.
 9. On the **Authorization** tab, grant the following permissions to the SAS Administrators group:
 - ReadMetadata
 - WriteMetadata
 - WriteMemberMetadata
 - CheckinMetadata
 - Read
 - Administer
- Deny the Write, Create, and Delete permissions to the SAS Administrators group.
10. Click **Add**.
 11. In the Add Users and Groups dialog box, move the SASUSERS group to the **Selected Identities** list. Click **OK**.
 12. Grant SASUSERS ReadMetadata permission and deny all other permissions.
 13. Click **OK** to save the new properties.

Remove References to sasspusr and SPAuth

In SAS Financial Management 4.4, the stored process server was configured to have an authentication domain of SPAuth. In the migrated system, remove references to this authentication domain, as follows:

1. In SAS Management Console, select the User Manager plug-in and open the properties for the Solutions Users group.
2. Click the **Accounts** tab.

3. Delete the entry for sasspusr and save your changes.
4. Select **Environment Management** ⇒ **Server Manager** ⇒ **SASMain** ⇒ **SASMain - Logical Stored Process Server** ⇒ **SASMain - Stored Process Server** and open the **Connection** properties.
5. Click the **Options** tab.
6. From the **Authentication Domain** drop-down list, select **DefaultAuth** and save your changes.
7. Make the same change to each of the load-balanced (LB) connection definitions.

Migrate SAS Web Report Studio Reports

Overview

In the SAS 9.1.3 release of SAS Financial Management, SAS Web Report Studio reports might be stored in more than one repository (for example, the Solutions repository or the Finance repository). By default, the BIP Tree in each repository was mapped to the same DAV content location (**/sasdav/wrs**). When the DAV content is migrated, all the content is stored in a single DAV folder. (The folder that is selected depends on which repository's **BIP Tree** folder is mapped first during the migration.)

You can verify the existence of multiple SAS 9.1.3 repositories by searching the AnalysisReport.html file in your SAS Migration Utility package for a warning similar to the following:

```
Content URL http://<DAV server>=8300/sasdav/wrs is mapped to by multiple
metadata roots: BIP Tree, BIP Tree, BIP Tree, BIP Tree
```

To repair the reports, you must export the SAS 9.1.3 reports and import them into your SAS 9.3 system (replacing the migrated reports), as described in the following sections. Otherwise, when users try to open a report, they might see a message stating that the report is not accessible.

Note: If your SAS 9.1.3 system used a different content mapping for the **/BIP Tree** folder in each repository, these steps are not necessary.

Export the SAS Web Report Studio Reports

To export the reports from the SAS 9.1.3 system, log on to SAS Management Console 9.1 as the unrestricted user (sasadm). In the BI Manager plug-in, examine the shared reports folder and the user reports folders in each repository. For each folder that contains SAS Web Report Studio reports, follow these steps:

1. Navigate to the source directory.
 For shared reports, the source directory is the **/BIP Tree/ReportStudio/Shared/Reports** folder.
 For users' personal reports, the source directory is the **/BIP Tree/ReportStudio/Users/username/Reports** folder.
2. Select all the reports in the **Reports** folder, right-click, and select **Export** from the pop-up menu.

3. In the Export wizard, select a destination for the export package:
 - a. Click **Browse** to browse to the directory where the package file will be exported.
Select a directory that is accessible from the SAS 9.3 installation.
 - b. Give the file a name that identifies the repository (and user, if these are user reports), so that you can easily select the correct file to import.
 - c. Click **Open**.
 - d. If you are exporting shared reports, select the **Include access controls** check box if you want to retain permissions that are associated with those reports.
Note: If the access controls are based on an access control template (ACT), make sure the ACT is defined in SAS 9.3 before importing these reports.
If you are exporting users' personal reports, do not select the **Include access controls** check box.
 - e. Click **Next**.
4. Select each of the reports to be migrated.
Do not select any dependent information maps for export.
5. Click **Next**.
6. Review the Summary and click **Export**.
7. Verify that the export process was successful and click **Finish**.

Import the Reports into the SAS 9.3 Installation

On the SAS 9.3 system, log on to SAS Management Console as the unrestricted user (sasadm). For each reports package that you exported from your SAS 9.1.3 system, follow these steps:

1. On the **Folders** tab, navigate to the target folder for the reports.
If you are importing shared reports, navigate to the `/repository-name/BIP Tree/ReportStudio/Shared/Reports` folder (for example, `/HR/BIP Tree/ReportStudio/Shared/Reports`).
If you are importing reports from a user's personal folder, navigate to the `/Users/username/My Folder/repository-name/Reports` folder (for example, `/Users/sasdemo/My Folder/Finance/Reports`).
Note: If desired, you can import the exported reports to a different folder and delete the old migrated reports.
2. Right-click the **Reports** folder and select **Import SAS Package** from the pop-up menu.
3. Complete the Import SAS Package page, as follows:
 - a. Click **Browse** and browse to the 4.4 package file that corresponds to this target folder.
 - b. Select the file and click **OK**.
 - c. If you saved access controls (for shared reports only), select the **Include access controls** check box.
For users' personal reports, do not select this check box.

- d. Select the **All objects** radio button (the default), so that existing reports with the same name are overwritten.
- e. Click **Next**.
4. On the Select Objects to Import page, select the reports to store in this folder and click **Next**.
5. On the About Metadata Connections page, click **Next**.
6. On the Information maps page, click the Browse button for each information map to verify or select the target information map.

By default, the correct target information map (in the **/BIP Tree/ReportStudio/Maps** folder) should already be selected. If the target information map is pointing to a different folder, navigate to the **/BIP Tree/ReportStudio/Maps** folder, select the appropriate information map, and click **OK**.
7. Click **Next**.
8. Verify the summary and click **Next** to import the reports.
9. Verify that the import process was successful and click **Finish**.

Validate the Installation

After performing the post-migration tasks:

1. Perform the post-configuration tasks that are described in “Post-Configuration Steps” in the *SAS Financial Management: System Administrator’s Guide*.

CAUTION:

Do not install the sample data! Doing so will overwrite existing data from the migrated system.

2. Perform the validation tasks that are described in the Instructions.html file on the middle tier.
3. Check for content that is known to be present in the source configuration.

Note: Some migrated content can or should be deleted. See “[Understanding the Migrated System](#)” on page 41.

You can also run the authorization differences reports. Those reports are described in the “Performing Post-migration Tasks” chapter of the *SAS 9.3 Intelligence Platform: Migration Guide*. These reports identify differences in access to libraries, tables, folders, OLAP schemas, and cubes between SAS 9.3 and previous installations. See also *What’s New in SAS 9.3 Intelligence Platform* and *What’s New in SAS Information Delivery Portal*.

For more information about changes that are specific to SAS Financial Management, see “[Understanding the Migrated System](#)” on page 41, as well as “What’s Changed in SAS Financial Management 5.3” in the *SAS Financial Management: Process Administrator’s Guide*.

See Also

“[References](#)” on page 2

Chapter 8

Migration from SAS 9.2 or SAS 9.3: Post-Migration Tasks

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Overview

This chapter applies to migrations from SAS 9.2 to SAS 9.3 or from SAS 9.3 to SAS 9.3. It describes tasks that must be performed after the installation and migration steps are complete.

Completing the tasks in this chapter requires the following:

- access to SAS Management Console in the SAS 9.3 installation.
- access to SAS Data Integration Studio in the SAS 9.3 installation. Running these SAS Data Integration Studio jobs requires the following group and role memberships:
 - SASSDM MySQL Users group
 - Financial Management: Process Administrator role

A user with this role has all the Financial Management capabilities. If this user does not need the full set of capabilities after the installation is complete, you can later edit the user properties in SAS Management Console.

Note: Do not connect as the unrestricted user. The unrestricted user cannot start a workspace server session.

Note: If your SAS 9.2 installation was the result of a migration from SAS 9.1.3, the *SAS-config-dir\Lev1\SASApp* directory might be called *SAS-config-dir\Lev1\SASMain* instead.

Apply File Permissions

Before performing any of the remaining post-migration tasks, apply file permissions as described in “Secure Your Installation” in the *SAS Financial Management: System Administrator’s Guide*. Otherwise, some tasks in this chapter will fail.

In particular, apply the following file permissions to the **SAS-config-dir** \Lev1\SASApp\Data directory and its subdirectories:

Table 8.1 File Permissions

Operating System	Permissions
Windows	<ul style="list-style-type: none"> Grant Full Control to SAS General Server User (sassrv). Grant Read/Write/Modify permission to users who run ETL or SAS jobs to update data in the warehouse. These users should include the Solutions Host User.
UNIX	Permit full access for the sas user ID and the sas user group.

For information about the repositories, folders, and libraries in a migrated system, see “Understanding the Migrated System” on page 41.

Migrate SAS Data Sets from 32-Bit to 64-Bit Microsoft Windows

Note: This section applies only if you are migrating from 32-bit to 64-bit Microsoft Windows.

During migration, libraries that are located under the **SAS-config-dir** directory are automatically converted from 32-bit format to 64-bit format. This includes the StageFM library, which is new for SAS Financial Management 5.3 and replaces both the DDS and StageDDS libraries.

However, after migration is complete, you must use PROC MIGRATE to manually convert data sets in any SAS libraries that are not located under the **SAS-config-dir**. For more information, see the SAS Note at <http://support.sas.com/kb/37/695.html>

(Optional) Modify Conform Library

In SAS Financial Management 5.3, by default the Conform library points to the same location as the StageFM library: **SAS-config-dir**\Lev1\SASApp\Data\FinancialManagement\StageFM.

If you do not want to use a separate conform area, skip the rest of this section.

If you want to create a separate conform area, you must modify the Conform LIBNAME statement, and you might need to upgrade its data sets. Follow these steps:

1. In the file system, create a **ConformedDataMart** directory under *SAS-config-dir\Lev1\SASApp\Data\FinancialManagement*.
2. Prepend the path for the ConformedDataMart to the Conform LIBNAME statement:
 - a. On the **Plug-ins** tab of SAS Management Console, navigate to **Environment Management** ⇒ **Data Library Manager** ⇒ **Libraries**.
 - b. Right-click **Conform** and open its properties.
 - c. On the **Options** tab, add *SAS-config-dir\Lev1\SASApp\Data\FinancialManagement\ConformedDataMart* to the **Path Specification**.

Replace *SAS-config-dir* with the path to your site's configuration directory. If necessary, use the up or down arrows so that this path precedes the path to the StageFM library.
3. If your site does not need the Conform data from the SAS 9.2 installation: Copy the StageFM data sets to the *SAS-config-dir\Lev1\SASApp\Data\FinancialManagement\ConformedDataMart* folder, replacing all the data sets in that folder. Skip step 5.
4. If your site does need the Conform data from the SAS 9.1.3 installation:
 - a. Manually upgrade the ConformedDataMart data sets to match the StageFM data model. If a StageFM data set contains one or more columns that are not present in the corresponding ConformedDataMart data set, add those columns to the ConformedDataMart data set.
 - b. If the tables are registered in the metadata repository: in SAS Data Integration Studio, navigate to the Conform library. With the table names selected, right-click and select **Update Metadata**.

For more information, see “Appendix 2: The Conform Area” in the *SAS Financial Management: Data Administration Guide*.

Migrate Additional Libraries

SAS libraries that were in locations outside the configuration directory were not automatically migrated. For more information, see “Migrating Content Stored Outside the SAS Configuration Directory” in the *SAS 9.3 Intelligence Platform: Migration Guide*.

Validate the Installation

After performing the post-migration tasks:

1. Perform the post-configuration tasks that are described in “Post-Configuration Steps” in the *SAS Financial Management: System Administrator's Guide*.

CAUTION:

Do not install the sample data! Doing so will overwrite existing data from the migrated system.

2. Perform the validation tasks that are described in the `Instructions.html` file on the middle tier.
3. Check for content that is known to be present in the source SAS 9.1.3 configuration.

Note: Some migrated content can or should be deleted. See [“Understanding the Migrated System” on page 41](#).

You can also run the authorization differences reports. Those reports are described in the “Performing Post-migration Tasks” chapter of the *SAS 9.3 Intelligence Platform: Migration Guide*. These reports identify differences in access to libraries, tables, folders, OLAP schemas, and cubes between the SAS 9.2 and SAS 9.3 installations. See also *What's New in SAS 9.3 Intelligence Platform* and *What's New in SAS Information Delivery Portal*.

For more information about changes that are specific to SAS Financial Management, see [“Understanding the Migrated System” on page 41](#), as well as “What's Changed in SAS Financial Management 5.3” in the *SAS Financial Management: System Administrator's Guide*.

See Also

[“References” on page 2](#)

Appendix 1

The Migrated System

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Understanding the Migrated System

This appendix describes changes that you might notice after migration, in objects such as metadata repositories, folders, libraries, and data sets.

Note: This is not an exhaustive list. Check your migrated system carefully to note differences from the previous release. See [“Validate the Installation” on page 35](#) for links to “What's New” information.

General Changes

These changes apply to all migrations.

Items That Are Not Migrated

Some items are not migrated, including the following:

- Alerts and alert settings.

Note: Opt-in alerts are not supported in SAS Financial Management 5.3.

- Items in a My Favorites portlet. The My Favorites portlet is no longer available.
- JVM options for the managed servers.

- Configuration settings for Oracle MySQL Server.
- Customizations to WebDAV templates.
- Workflow customizations. See “Customizing a Workflow” in the *SAS Financial Management: Customization Guide* for new instructions.
- Custom stored processes are migrated if they reside under the **SAS-config-dir** directory. They might need updating to match SAS 9.3 requirements. See the *SAS Financial Management: Customization Guide* for details.
- If you created a custom cell action for use in the SAS Financial Management Add-In for Microsoft Excel, you must change the stored process definition. See the *SAS Financial Management: Customization Guide* for details.

Additional Changes to Note

- For Web data entry in SAS Financial Management 5.3, no extraneous text is permitted in the same rows as a data-entry table. If such content exists in a form template, it is not displayed in the forms. (The text is displayed when the forms are edited in Microsoft Excel.) If necessary, edit your form templates and move the content to a different location on the worksheet.

Note: Data-entry forms that were migrated from SAS 9.1.3 can be opened only in Microsoft Excel, not in the Web client.

- Prior to SAS Financial Management 5.3, users could apply member selection rules to member properties and custom properties in a table (via the table wizard or the Show Members window). As of SAS Financial Management 5.3, properties can be used to filter the hierarchy that they are associated with. Users can no longer apply member selection rules to those properties.

During migration, member selection rules for properties are converted to property filters for the associated hierarchy. For more information, see the online Help for the Show Members window in the SAS Financial Management Add-In for Microsoft Excel.

SAS Data Sets

SAS data sets in SAS libraries whose directories are beneath the SAS configuration directory are automatically migrated to the SAS 9.3 system. The libraries for SAS Financial Management 5.3 are located in the **SAS-config-dir** \Lev1\SASApp\Data\FinancialManagement directory. (In a migration from SAS 9.1.3, **SASMain** replaces **SASApp** in the path.) Other SAS libraries are placed in the same location relative to the SAS configuration directory root as they were in the previous release. Some changes to note:

- The StageFM library replaces the stagedds library.
- The Cross Industry Detail Data Store is no longer used. Data is loaded directly from the staging area to the SAS Financial Management data mart.

For more information, see the *SAS Financial Management: Data Administrator's Guide*.

(Optional) After migration is complete, you can safely delete the following directories from the SAS 9.3 installation:

- \Lev1\Data\DDSDData
- \Lev1\Data\stagedds
- \Lev1\Data\ConformedDataMart
- \Lev1\Data\crossindustrydds

In metadata, the Cross Industry Detail Data Store folder and its dependencies can also be deleted or left in place.

SAS libraries that were in locations outside the configuration directory are not automatically migrated. For more information, see “Migrating Content Stored Outside the SAS Configuration Directory” in the *SAS 9.3 Intelligence Platform: Migration Guide*.

(SAS 9.1.3 migrations) After a migration, the formerly dependent Finance repository might contain the fmsDS library from SAS Financial Management 4.4. This SAS library, if it exists, refers back to SAS Financial Management 4.4. It can be safely ignored or deleted from the SAS 9.3 installation.

Jobs from SAS Financial Management 5.1 or 5.2

The SAS Financial Management 5.3 jobs are located in these metadata folders: **/Products/SAS Financial Management/5.3 Jobs** and **/Products/SAS Financial Management/5.3 Standard Reports**.

Jobs from SAS Financial Management 5.1 or 5.2 are not upgraded in a migration. However, they are saved in folders such as the following:

- **/Products/SAS Solutions Services/5.2 Jobs**
- **/Products/SAS Solutions Services/5.2 Standard Reports**
- **/Products/Cross Industry Detail Data Store**

You can save the old jobs for reference, or you can delete them.

Role and Group Memberships

Metadata role and group memberships are migrated.

For information about groups, roles, and the use of capabilities in SAS Financial Management, see “Group and Role Assignments” in the *SAS Financial Management: System Administrator’s Guide*. For information about groups, roles, and capabilities in the SAS Intelligence Platform, see the *SAS Intelligence Platform: Security Administration Guide*.

Migrations from SAS 9.1.3

Metadata Repositories

All the metadata repositories that existed in the SAS 9.1.3 metadata server have been migrated to the SAS 9.3 metadata server. The new SAS Management Console contains a

new **Folders** tab. Each repository other than the Foundation repository is represented as a separate top-level folder on the **Folders** tab, along with the new folders from the SAS 9.3 installation.

The migrated repositories also exist on the **Plug-ins** tab of SAS Management Console as separate repositories.

All documents in the **Finance** repository in SAS 9.1.3 have been moved into the **Shared Content/Finance/Documents/Shared Documents** folder.

WebDAV Content

All WebDAV content that was previous associated with Xythos WebFile Server or Apache is now stored in the SAS Content Server.