



Pre-installation Tasks

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Chapter 1

Pre-installation Tasks

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Pre-installation Checklist

Table 1.1 Pre-installation Tasks Checklist

Task: All Operating Environments
Create all user accounts in the operating environment.
Create a SAS Forecast Server administrative user.
Create a SAS Forecast Server User Group.

Administration Tasks for All Operating Environments

Create User Accounts in the Operating Environment

A pre-installation checklist is referenced in the index.html file that comes with your planning package. You should either print the Pre-installation Checklist and fill in the blanks, or edit the checklist with an HTML editor to fill in the blanks. The remaining installation steps call for this information, and your installation is easier if you complete the checklist before starting your installation process.

NOTE: In order to grant specific permissions, be sure that you create the following SAS user IDs on the server tier machine:

- sasadm
- sasdemo

- sasguest
- sassrv
- sastrust
- fsadm (SAS Forecast Server administrative user)
NOTE: The SAS Forecast Server administrative user is specific to SAS Forecast Server, and you are not prompted for this administrative user during configuration. You must add this administrative user because it is needed to perform some post-installation tasks.)

Create a SAS Forecast Server Administrative User

In order to perform some installation and configuration tasks, you need to create a SAS Forecast Server administrative user on the SAS Workspace Server machine. Alternatively, you can grant administrative permissions later to an existing user in SAS Metadata Server. Do NOT use the SAS Administrative user (e.g., sasadm).

When creating the user ID for Windows, it is recommended that you do the following:

- Clear the **User must change password at next logon** check box.
- Select the **User cannot change password** check box.
- Select the **Password never expires** check box.
- Grant the user permission **Log on as a Batch Job**.

NOTE: In the Windows user manager, you cannot enter <domain>\username (you enter the user name only), but you must enter <domain>\username in the SAS Configuration Wizard and SAS Management Console.

You can create a SAS Forecast Server administrative user that must be authenticated on the SAS Metadata Server and the SAS Workspace Server, as shown in [Table 1.2](#). This account is used by the SAS Forecast Server Mid-Tier to access the servers, data, and user credentials.

Table 1.2 SAS Forecast Server Administrative User Information

SAS Forecast Server Administrative User Information		Done
User Name:	_____ Example: For Windows, <domain>\fsadm, where <domain> is the Windows domain qualifier For UNIX, fsadm	[]
Full Name:	_____ Example: SAS Forecast Server Administrative User	[]
Password:	_____	[]

Create a SAS Forecast Server User Group

Different users have different operating system privileges when using the SAS Workspace Server. By defining operating system user groups, you can grant permissions to all of the SAS Forecast Server users who log on to the SAS Metadata Server as members of the group with the same credentials.

Later in the post-installation instructions, you must grant SAS Forecast Server users Read, Write, and Execute access on the . . ./SAS/ForecastStudio/ directory that is created during installation. The exact details of how to do this varies according to which operating system groups are defined, and how restrictive you want your security to be.

For a more secure deployment, you can create a SAS Forecast Server user group and ensure that the group contains all of the SAS Forecast Server users. In the UNIX operating environment, the physical central repository of saved projects must have Write permissions by all SAS Forecast Server users. Therefore, the SAS Forecast Server users' UNIX logons must be in the same UNIX OS group. UNIX users can be members of multiple groups, but one of the groups is primary. In this case, the SAS Forecast Server group must be the primary group. In the UNIX operating environment, the following conditions must be met:

- The UNIX OS group of forecasting users is created.
- The UNIX forecasting user IDs are members of the OS group and it becomes the primary group.
- The SAS scripts are updated to specify the umask options when the SAS Workspace Server and SAS Stored Process Server are running under the forecasting group user identities.
- The central physical project repository (*forecast-studio-project-directory*) has the correct ownership and group Write permissions applied on behalf of the forecasting group.

You must include any user who might run code that is created from a SAS Forecast Server project in a SAS session as part of the group.

