



# SAS<sup>®</sup> Inventory Optimization Workbench 5.3: Upgrade and Migration Guide, Second Edition

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**SAS® Inventory Optimization Workbench 5.3: Upgrade and Migration Guide, Second Edition**

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## 1

# Migrate 5.2 to the First Maintenance Release of 5.3

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## Pre-migration Tasks

### Prerequisites for Migrating 5.2 to the First Maintenance Release of 5.3

When you are migrating SAS Inventory Optimization Workbench 5.2 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, the following prerequisites apply:

- You must be familiar with the SAS 9.4 installation and configuration processes. For more information, see <http://support.sas.com/documentation/installcenter/94/index.html>.
- Review the system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3. The detailed system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3 are available at <http://support.sas.com/documentation/installcenter/en/ikinvoptofrndmsr/69171/HTML/default/index.html>.

- Review the instructions in *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.
- 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 system are also present on the target system in order to maintain the consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASInventoryOptimizationWorkbench/data* and *IOTRANS*.

## 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.

For more information, see *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.

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## Migration Tasks

### Create a Migration Package

On the source system that contains SAS Inventory Optimization 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/69173/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 First Maintenance Release of 5.3 By Using the Migration Package

In order to deploy the first maintenance release of SAS Inventory Optimization Workbench 5.3 by using the migration package, ensure that you choose the following settings in the 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

## Confirm Installation of Hot Fixes

Ensure that you install all hot fixes that are available for the first maintenance release of SAS Inventory Optimization Workbench 5.3. For a list of all hot fixes available for your solution, see <http://ftp.sas.com/techsup/download/hotfix/hotfix.html>.

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## Post-migration Tasks

### About Post-migration Tasks

Immediately after you migrate SAS Inventory Optimization Workbench 5.2 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

### Confirm the Presence of a SAS Inventory Optimization Workbench User

Confirm that a solution-specific operating-system user that existed on the source system is also present on the target system. Each of these users must be a member of the SAS Server Users group on Windows or must be a member of the group that the installation user belongs to on UNIX.

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/69172/HTML/default/viewer.htm>.

### Update the Data Structures

Run the `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave10 (Migration)/iow_1001_data_migration` job through SAS Data Integration Studio. The job transforms the data structures to those of the first maintenance release of SAS Inventory Optimization Workbench 5.3.

## Update Reports

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

If you created reports by using SAS Web Report Studio in SAS Inventory Optimization Workbench 5.2 and you have migrated to the first maintenance release of SAS Inventory Optimization Workbench 5.3, then you must update the references of all libraries in the respective SAS Information Maps.

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

- 1 In 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 become available.

### Run ETL Job for Reports Created in SAS Visual Analytics

If you have SAS Visual Analytics reports that use data from SAS Inventory Optimization Workbench 5.2 and you migrated to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must update those reports.

- 1 Start the SAS LASR Analytic Server.
- 2 Run the following jobs:
  - /Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave08 (VA integration - Data preparation):
    - iow\_0801\_va\_forecasted\_demand
    - iow\_0802\_va\_order\_details
    - iow\_0803\_va\_promotional\_order\_details
    - iow\_0804\_va\_inventory\_performance
  - /Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave09 (VA integration - Data Upload to LASR)/iow\_0901\_data\_upload\_to\_LASR

## Load Incremental Data to View Projected Back Orders

The first maintenance release of SAS Inventory Optimization Workbench 5.3 displays the projected back-order metric in the **Replenishment Details** view,



which is in the Orders workspace. The projected back-order metric was not available in the earlier releases of SAS Inventory Optimization Workbench. Therefore, after you migrate from SAS Inventory Optimization Workbench 5.2 or from the second maintenance release of SAS Inventory Optimization Workbench 5.2, the first maintenance release of SAS Inventory Optimization Workbench 5.3 displays no value for the projected back order. However, after you load the incremental data, the first maintenance release of SAS Inventory Optimization Workbench 5.3 calculates and displays the projected back-order metric.

## Update Configuration Parameters

After you migrate to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must verify that the values in the configuration parameters meet your business requirements. If any new parameters were added in the first maintenance release of SAS Inventory Optimization Workbench 5.3, you can update them. For more information about configuration parameters, see *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.



## 2

## Migrate the Second Maintenance Release of 5.2 to the First Maintenance Release of 5.3

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### Pre-migration Tasks

#### Prerequisites for Migrating the Second Maintenance Release of 5.2 to the First Maintenance Release of 5.3

When you are migrating the second maintenance release of SAS Inventory Optimization Workbench 5.2 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, the following prerequisites apply:

- You must be familiar with the SAS 9.4 installation and configuration processes. For more information, see <http://support.sas.com/documentation/installcenter/94/index.html>.
- Review the system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3. The detailed system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3

are available at <http://support.sas.com/documentation/installcenter/en/ikinoptofrndmsr/69171/HTML/default/index.html>.

- Review the instructions in *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.
- 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 system are also present on the target system in order to maintain the consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASInventoryOptimizationWorkbench/data* and *IOTRANS*.

## 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.

For more information, see *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.

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## Migration Tasks

### Create a Migration Package

On the source system that contains the second maintenance release of SAS Inventory Optimization 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/69173/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 First Maintenance Release of 5.3 By Using the Migration Package

In order to deploy the first maintenance release of SAS Inventory Optimization Workbench 5.3 by using the migration package, ensure that you choose the following settings in the 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

## Confirm Installation of Hot Fixes

Ensure that you install all hot fixes that are available for the first maintenance release of SAS Inventory Optimization Workbench 5.3. For a list of all hot fixes available for your solution, see <http://ftp.sas.com/techsup/download/hotfix/hotfix.html>.

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## Post-migration Tasks

### About Post-migration Tasks

Immediately after you migrate the second maintenance release of SAS Inventory Optimization Workbench 5.2 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

### Confirm the Presence of a SAS Inventory Optimization Workbench User

Confirm that a solution-specific operating-system user that existed on the source system is also present on the target system. Each of these users must be a member of the SAS Server Users group on Windows or must be a member of the group that the installation user belongs to on UNIX.

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/69172/HTML/default/viewer.htm>.

### Update the Data Structures

Run the `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave10 (Migration)/iow_1001_data_migration` job through SAS Data

Integration Studio. The job transforms the data structures to those of the first maintenance release of SAS Inventory Optimization Workbench 5.3.

## Run ETL Jobs for Reports Created in SAS Visual Analytics

If you have SAS Visual Analytics reports that use data from the second maintenance release of SAS Inventory Optimization Workbench 5.2 and you migrated to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must update the reports.

- 1 Start the SAS LASR Analytic Server.
- 2 Run the following jobs:
  - `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave08 (VA integration - Data preparation):`
    - `iow_0801_va_forecasted_demand`
    - `iow_0802_va_order_details`
    - `iow_0803_va_promotional_order_details`
    - `iow_0804_va_inventory_performance`
  - `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave09 (VA integration - Data Upload to LASR)/iow_0901_data_upload_to_LASR`

## Load Incremental Data to View Projected Back Orders

SAS Inventory Optimization Workbench 5.3 displays the projected back-order metric in the **Replenishment Details** view, which is in the Orders workspace. The projected back-order metric was not available in the earlier releases of SAS Inventory Optimization Workbench. Therefore, after you migrate from SAS Inventory Optimization Workbench 5.2 or from the second maintenance release of SAS Inventory Optimization Workbench 5.2, the first maintenance release of SAS Inventory Optimization Workbench 5.3 displays no value for the projected back order. However, after you load the incremental data, the first maintenance release of SAS Inventory Optimization Workbench 5.3 calculates and displays the projected back-order metric.

## Update Configuration Parameters

After you migrate to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must verify that the values in the configuration parameters meet your business requirements. If new parameters were added in the first maintenance release of SAS Inventory Optimization Workbench 5.3, you can update them. For more information about configuration parameters, see *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

## 3

## Migrate 5.3 to the First Maintenance Release of 5.3

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### Pre-migration Tasks

#### Prerequisites for Migrating 5.3 to the First Maintenance Release of 5.3

When you are migrating SAS Inventory Optimization Workbench 5.3 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, the following prerequisites apply:

- You must be familiar with the SAS 9.4 installation and configuration processes. For more information, see <http://support.sas.com/documentation/installcenter/94/index.html>.
- Review the system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3. The detailed system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3 are available at <http://support.sas.com/documentation/installcenter/en/ikinvoptofrndmsr/69171/HTML/default/index.html>.
- Review the instructions in *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.

- 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 are present on the source system are also present on the target system in order to maintain consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASInventoryOptimizationWorkbench/data* and *IOTRANS*.

## 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.

For more information, see *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.

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## Migration Tasks

### Create a Migration Package

On the source system that contains SAS Inventory Optimization Workbench 5.3, 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/69173/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 First Maintenance Release of 5.3 By Using the Migration Package

In order to deploy the first maintenance release of SAS Inventory Optimization Workbench 5.3 by using the migration package, ensure that you choose the following settings in the 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

## Confirm Installation of Hot Fixes

Ensure that you install all hot fixes that are available for the first maintenance release of SAS Inventory Optimization Workbench 5.3. For a list of all hot fixes available for your solution, see <http://ftp.sas.com/techsup/download/hotfix/hotfix.html>.

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## Post-migration Tasks

### About Post-migration Tasks

Immediately after you migrate SAS Inventory Optimization Workbench 5.3 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

### Confirm the Presence of a SAS Inventory Optimization Workbench User

Confirm that a solution-specific operating-system user that existed on the source system is also present on the target system. Each of these users must be a member of the SAS Server Users group on Windows or must be a member of the group that the installation user belongs to on UNIX.

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/69172/HTML/default/viewer.htm>.

### Run ETL Jobs for Reports Created in SAS Visual Analytics

You must run ETL jobs for reports that were created in SAS Visual Analytics on a source system.

- 1 Start the SAS LASR Analytic Server.

2 Run the following jobs:

- `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave08 (VA integration - Data preparation)`
  - `iow_0801_va_forecasted_demand`
  - `iow_0802_va_order_details`
  - `iow_0803_va_promotional_order_details`
  - `iow_0804_va_inventory_performance`
- `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave09 (VA integration - Data Upload to LASR)/iow_0901_data_upload_to_LASR`

## Update Configuration Parameters

After you migrate to a target system, you must verify that the values in the configuration parameters meet your business requirements. For more information about configuration parameters, see *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

## 4

## Migrate the First Maintenance Release of 5.3 to a Target System

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### Pre-migration Tasks

#### Prerequisites for Migrating the First Maintenance Release of 5.3 from a Source System to a Target System

When you are migrating the first maintenance release of SAS Inventory Optimization Workbench 5.3 from a source system to a target system, the following prerequisites apply:

- You must be familiar with the SAS 9.4 installation and configuration processes. For more information, see <http://support.sas.com/documentation/installcenter/94/index.html>.
- Review the system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3. The detailed system requirements for the first maintenance release of SAS Inventory Optimization Workbench 5.3 are available at <http://support.sas.com/documentation/installcenter/en/ikinvoptofrndmsr/69171/HTML/default/index.html>.

- Review the instructions in *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.
- 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 are present on the source system are also present on the target system in order to maintain consistency in file access permissions.
- Ensure that you make a backup of *SAS-configuration-directory/Levn/AppData/SASInventoryOptimizationWorkbench/data* and *IOTRANS*.

## 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.

For more information, see *SAS 9.4 Intelligence Platform: Migration Guide* at <http://support.sas.com/documentation/cdl/en/bimig/69173/HTML/default/viewer.htm>.

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## Migration Tasks

### Create a Migration Package

On the source system that contains the first maintenance release of SAS Inventory Optimization Workbench 5.3, 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/69173/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 First Maintenance Release of 5.3 By Using the Migration Package

In order to deploy the first maintenance release of SAS Inventory Optimization Workbench 5.3 by using the migration package, ensure that you choose the following settings in the 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

## Confirm Installation of Hot Fixes

Ensure that you install all hot fixes that are available for the first maintenance release of SAS Inventory Optimization Workbench 5.3. For a list of all hot fixes available for your solution, see <http://ftp.sas.com/techsup/download/hotfix/hotfix.html>.

---

## Post-migration Tasks

### About Post-migration Tasks

Immediately after you migrate the first maintenance release of SAS Inventory Optimization Workbench 5.3 to a target system, you must perform the post-migration tasks. Do not perform the post-installation tasks that are described in *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

### Confirm the Presence of a SAS Inventory Optimization Workbench User

Confirm that a solution-specific operating-system user that existed on the source system is also present on the target system. Each of these users must be a member of the SAS Server Users group on Windows or must be a member of the group that the installation user belongs to on UNIX.

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/69172/HTML/default/viewer.htm>.

### Run ETL Jobs for Reports Created in SAS Visual Analytics

You must run ETL jobs for reports that were created in SAS Visual Analytics on a source system.

- 1 Start the SAS LASR Analytic Server.

2 Run the following jobs:

- /Products/SAS Inventory Optimization Workbench/5.3 Jobs/  
Wave08 (VA integration - Data preparation)
  - iow\_0801\_va\_forecasted\_demand
  - iow\_0802\_va\_order\_details
  - iow\_0803\_va\_promotional\_order\_details
  - iow\_0804\_va\_inventory\_performance
- /Products/SAS Inventory Optimization Workbench/5.3 Jobs/  
Wave09 (VA integration - Data Upload to LASR)/  
iow\_0901\_data\_upload\_to\_LASR

## Update Configuration Parameters

After you migrate to a target system, you must verify that the values in the configuration parameters meet your business requirements. For more information about configuration parameters, see *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

# 5

## Upgrade to the First Maintenance Release of 5.3

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### Introduction to Upgrading SAS Inventory Optimization Workbench

You can upgrade any of the following previously installed versions of SAS Inventory Optimization Workbench to the first maintenance release of SAS Inventory Optimization Workbench 5.3:

- SAS Inventory Optimization Workbench 5.2
- the second maintenance release of SAS Inventory Optimization Workbench 5.2
- SAS Inventory Optimization Workbench 5.3

This chapter provides complete information about upgrading SAS Inventory Optimization Workbench.

---

### Pre-upgrade Tasks

Before you upgrade to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must perform the following tasks:

- assess the effect of the update on products at your site

Assessing the effect of the update on products at your site includes reviewing the list of products that will be updated on a system. From SAS Deployment Wizard, generate a list of the product updates that SAS will apply to the current system. This list of product updates could vary for each machine at your site.

- make backups

Make a backup of the database, 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>.

---

## Upgrading SAS Inventory Optimization Workbench

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

Perform the SAS Deployment Wizard tasks in order to upgrade to the first maintenance release of SAS Inventory Optimization Workbench 5.3, and then perform the SAS Deployment Manager tasks in order to configure the first maintenance release of SAS Inventory Optimization Workbench 5.3. In order to configure SAS Inventory Optimization Workbench for use with SAS Visual Analytics, select the default services that are related to SAS Visual Analytics in SAS Deployment Manager.

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>.

---

## Confirm Installation of Hot Fixes

After you have used the SAS tools to upgrade your software, install all hot fixes that are available for the first maintenance release of SAS Inventory Optimization Workbench 5.3. For a list of all hot fixes available for your solution, see <http://ftp.sas.com/techsup/download/hotfix/hotfix.html>.



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## Post-upgrade Tasks

### About Post-upgrade Tasks

Immediately after you upgrade SAS Inventory Optimization Workbench 5.2, the second maintenance release of SAS Inventory Optimization Workbench 5.2, or SAS Inventory Optimization Workbench 5.3 to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must perform the post-upgrade tasks. Do not perform the post-installation tasks that are described in *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

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

### Update the Data Structures

After you complete any manual steps that are mentioned in the `UpdateInstructions.html` file, run the `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave10 (Migration)/iow_1001_data_migration` job through SAS Data Integration Studio. The job transforms the data structures to those of the first maintenance release of SAS Inventory Optimization Workbench 5.3.

### Update Reports

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

If you created reports by using SAS Web Report Studio in SAS Inventory Optimization Workbench 5.2 and you have upgraded to the first maintenance release of SAS Inventory Optimization Workbench 5.3, then you must update the references of all libraries in the respective SAS Information Maps.

Do not perform this task if you are upgrading from any version of SAS Inventory Optimization Workbench other than SAS Inventory Optimization Workbench 5.2.

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

- 1 In 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 become available.

## Run ETL Job for Reports Created in SAS Visual Analytics

If you have SAS Visual Analytics reports that use data from SAS Inventory Optimization Workbench 5.2 or from the second maintenance release of SAS Inventory Optimization Workbench 5.2 and you have updated to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must update those reports.

- 1 Start the SAS LASR Analytic Server.
- 2 Run the following jobs:
  - `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave08 (VA integration - Data preparation):`
    - `iow_0801_va_forecasted_demand`
    - `iow_0802_va_order_details`
    - `iow_0803_va_promotional_order_details`
    - `iow_0804_va_inventory_performance`
  - `/Products/SAS Inventory Optimization Workbench/5.3 Jobs/Wave09 (VA integration - Data Upload to LASR)/iow_0901_data_upload_to_LASR`

## Load Incremental Data to View Projected Back Orders

The first maintenance release of SAS Inventory Optimization Workbench 5.3 displays the projected back-order metric in the **Replenishment Details** view, which is in the Orders workspace. The projected back-order metric was not available in the earlier releases of SAS Inventory Optimization Workbench. Therefore, after you upgrade from SAS Inventory Optimization Workbench 5.2 or from the second maintenance release of SAS Inventory Optimization Workbench 5.2, the first maintenance release of SAS Inventory Optimization Workbench 5.3 displays no value for the projected back order. However, after you load the incremental data, the first maintenance release of SAS Inventory Optimization Workbench 5.3 calculates and displays the projected back-order metric.

## Update Configuration Parameters

After you upgrade to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must verify that the values in the configuration parameters meet your business requirements. If there are any new parameters added in the first maintenance release of SAS Inventory Optimization Workbench 5.3, you can update them. For more information about configuration parameters, see *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*.

## Confirm Groups and Roles Related to SAS Visual Analytics

After you upgrade to the first maintenance release of SAS Inventory Optimization Workbench 5.3, you must confirm that the SAS Inventory

Optimization Workbench groups are members of the SAS Visual Analytics-related groups.

If SAS Inventory Optimization Workbench groups are members of the SAS Visual Analytics-related roles, perform the following tasks:

- 1 Log on to SAS Management Console as an unrestricted user (sasadm) or as a user who has the capability to update the groups.
- 2 On the **Plug-ins** tab, select **Environment Management** ► **User Manager**.
- 3 In the **User Manager** node, perform the following tasks.

*Table 5.1 Update SAS Visual Analytics-Related Groups and Roles*

Right-click on each of the following items, and then select Properties.	On the <b>Members</b> tab in the Properties dialog box, perform the following actions:
<b>Visual Analytics: Analysis</b> role	Remove the <b>Inventory Opt Workbench Analysts</b> and <b>Inventory Opt Workbench Buyers</b> groups
<b>Visual Analytics: Data Building</b> role	Remove the <b>Inventory Opt Workbench Analysts</b> group
<b>Visual Analytics Data Administrators</b> group	Add the <b>Inventory Opt Workbench Analysts</b> and <b>Inventory Opt Workbench ETL Users</b> groups
<b>Visual Data Builder Administrators</b> group	Add the <b>Inventory Opt Workbench Analysts</b> , <b>Inventory Opt Workbench Buyers</b> , and <b>Inventory Opt Workbench ETL Users</b> groups

- 4 Click **OK**.



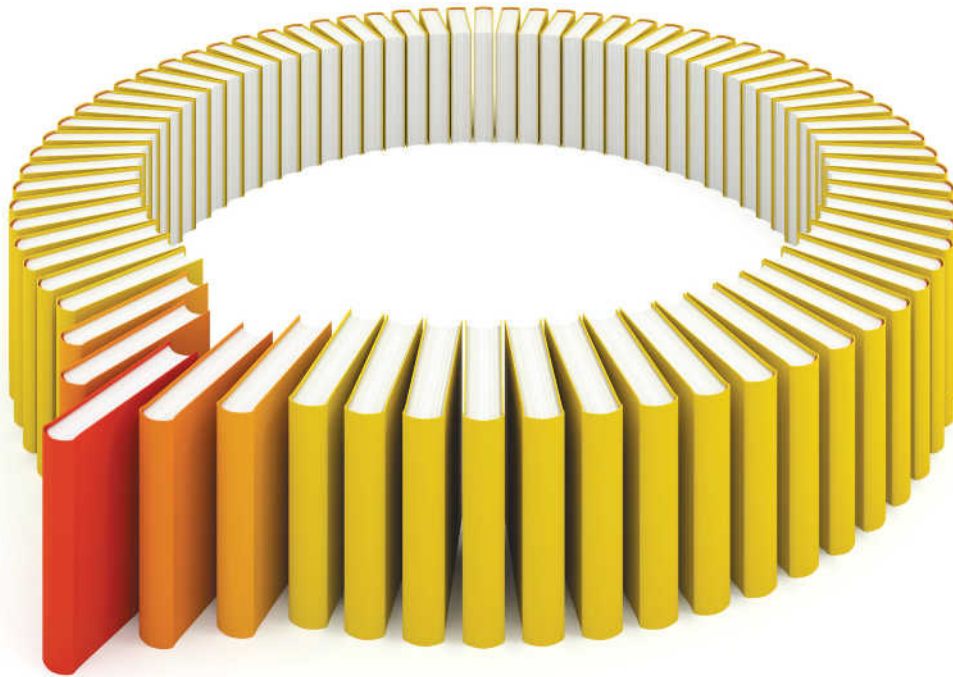
## Recommended Reading

- *SAS Inventory Optimization Workbench 5.3: Administrator's Guide*
- *SAS Inventory Optimization Workbench 5.3: Data Reference Guide*
- *SAS Inventory Optimization Workbench 5.3: User's Guide*
- *SAS 9.4 Guide to Software Updates*

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