QuickStart Guide: SAS® 9.4 Planned Deployments Using Electronic Software Delivery

To prepare for your deployment, use the information below to confirm the contents of your software order and review its documentation. Then follow the numbered steps to perform your software deployment.

If you are migrating from SAS 9.2 or SAS 9.3, contact SAS Technical Support.

Confirm your order and download the software.

Confirm that your SAS Software Order Email (SOE) lists the software that you expect to receive.

If it is not what you expected, contact SAS Technical Support.

Follow the instructions in the SOE to download your software. The SAS Download Manager stores your software in a SAS Software Depot (the repository for your SAS software) at the location you select.

- A list of SAS software is also in the SAS Order Information document in your SAS Software Depot: *SAS-Software-Depot*/install_doc/*order-number*/soi.html
- The complete list of products in your software order is available at *SAS-Software-Depot*/install_doc/*order-number*/ordersummary.html

Review documentation.

Review the System Requirements.

- Review requirements documentation for SAS 9.4 Foundation and the SAS solutions in your software order. These documents are available on the SAS 9.4 System Requirements page.
- Additional requirements are described in the following locations:
  o the Pre-Install Checklist that is included in the ZIP file with your Deployment Plan
  o the README files stored in *SAS-Software-Depot*/install_doc/*order-number*/ReadmeFiles

Review the requirements for the SAS Installer account:

- **Windows**: The installer account requires Administrator rights (a local administrator on the machine or a member of the administrators group). For details, see SAS Usage Note 5055.
- **UNIX**: The installer account must be the sas account with a umask of 022. Do not use the root account.

To determine whether you need installation instructions, upgrade instructions, or migration instructions, start by reading Understanding SAS Software Updates in *SAS 9.4 Guide to Software Updates and Product Changes*.

Perform your software deployment.

1 **If you are modifying an existing SAS deployment, perform a backup before you install your new SAS software order.**

- Back up the existing SASHOME directory (for example, C:\Program Files\SASHome) and configuration directories. Follow your site's established backup procedures.
- Back up your metadata. For information, see Backing Up and Restoring Your SAS Content in the *SAS 9.4 System Administration Guide*.

2 **Complete the pre-installation checklist.**

Your Pre-Installation checklist (PDF) was included with the customized SAS Plan File that is required for the SAS deployment. You can access standard deployment plans on the Downloads and Hot Fixes: Deployment Plans page. SAS recommends using customized files for most deployments.

If a consultant provided a customized deployment plan, use the checklist included with that plan.

Your checklist identifies third-party software that must be installed before you begin to deploy your SAS software. If necessary, obtain that software and install it according to the vendor's instructions.

3 **Follow the supplemental instructions for deploying SAS software and required third-party software.**

If your order contains alternate or supplemental instructions for certain products, these products are listed in README files in your SAS Software Depot.

4 **Launch SAS Deployment Wizard from your SAS Software Depot.**

- **Windows**: Run setup.exe at the root of the SAS Software Depot as an administrator.
- **UNIX**: Execute setup.sh at the root of the SAS Software Depot. Use the sas account with umask of `022`.

SAS Deployment Wizard presents a series of dialog boxes to help you install and configure your software. The steps depend on the contents of the order and your selections. Proceed through the wizard to install and configure your software.

If your SAS software order contains updates for software that is currently installed on your system, these updates must be completed before new software is deployed. SAS Deployment Wizard updates products and components to the level of the software in your new order.

All the steps that are required for the deployment are described in the official installation, upgrade, or migration documentation:

- SAS 9.4 Intelligence Platform: Installation and Configuration Guide
- SAS 9.4 Guide to Software Updates and Product Changes
- SAS 9.4 Intelligence Platform: Migration Guide

5 **If required, perform additional configuration steps.**

Complete any product-specific post-installation steps that are associated with the SAS products in your software order. If such steps are required, a file named Instructions.html or UpdateInstructions.html is generated by SAS Deployment Wizard. Typically, it is saved in the `Lev`*n* configuration directory on the machine where the SAS Software Depot is located: *SASHOME*`/Config/Lev1/Instructions.html`.

Additional post-deployment configuration steps are described in the official deployment or upgrade documentation.

For UNIX, three files located in the `!SASROOT/utilities/bin` directory must be `setuid root`. For details, see SAS Knowledge Base article 15231.

More Information

For information about updating SAS 9.4 to a newer maintenance release, see Maintenance Releases and Product Upgrades.

For information about SAS hot fixes, check the Hot Fix Announcements page.

Technical Support

Technical support is available to all customers who license SAS software. However, you are encouraged to engage your designated on-site SAS support personnel as your first support contact. If your on-site SAS support personnel cannot resolve your issue, they can open a case with SAS Technical Support to report your problem.

Before you contact SAS Technical Support, explore the SAS Support website at `https://support.sas.com/techsup/`. This site offers access to the SAS Knowledge Base, SAS communities, and other materials that might answer your questions.

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