Road Map

SAS® Marketing Automation

This Road Map briefly describes the media contained in your SAS Marketing Automation package and how to proceed to install the software.

Description of Your Packages

Your SAS Marketing Automation software comes in as many as two installation kits, each representing a distinct functional area of your SAS Marketing Automation solution:

- SAS Metadata Server
- SAS Marketing Automation

There may also be a folder that contains Scalable Performance Data Server.

How to Proceed

Be sure to terminate all non-essential applications before proceeding with the installation of any CD. Disable any anti-virus software that may be running.

Step 1: Install and configure the installation kit containing SAS Metadata Server.

❑ To identify the installation kit that contains SAS Metadata Server, see the product listing on the SAS 9.1.3 label on each kit. Unless you have already done so, follow the steps in the *QuickStart Guide* in the Getting Started folder of the SAS Metadata Server kit.

❑ Read and complete the tasks in the *SAS 9.1.3 Intelligence Platform: Installation Guide*, which is available on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Planning Installation Edition Kit**, then select **SAS 9.1.3 Intelligence Platform: Installation Guide** in the "Installation" section under "Installation Instructions – SAS Intelligence Platform." The *Installation Guide* takes you through the pre-installation, installation, and basic configuration steps to install your SAS Metadata Server.

Step 2: Install and configure the installation kit containing SAS Marketing Automation.

Note: If SAS Marketing Automation was included in the SAS Metadata Server installation kit, then this installation should be complete. Otherwise continue with this step.

❑ To identify the installation kit that contains SAS Marketing Automation, see the product listing on the SAS 9.1.3 label on each kit. Unless you have already done so, follow the steps in the *QuickStart Guide* in the Getting Started folder of the SAS Marketing Automation kit.

❑ Read and complete the tasks in the *SAS 9.1.3 Intelligence Platform: Installation Guide*, which is available on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Planning Installation Edition Kit**, then select **SAS 9.1.3 Intelligence Platform: Installation Guide** in the "Installation" section under "Installation Instructions – SAS Intelligence Platform." The *Installation Guide* takes you through the pre-installation, installation, and basic configuration steps to install your SAS Marketing Automation.

Step 3: Install Platform Suite for SAS

If your software order includes Platform Suite for SAS, locate the *Installation Guide—Platform Suite for SAS* on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Planning Installation Edition Kit**, then select **Installation Guide-- Platform Suite for SAS** in the "Installation" section under "Additional Installation Instructions." Follow the procedures in that document to install and configure your Platform Scheduling Server on the same machine where your SAS Marketing Automation Server is installed.

Additional Information

More detailed information about installation, administration, and use of SAS Marketing Automation can be found in a number of additional documents. The *SAS Marketing Automation 5.1 Administrator's Guide* is available at the following Web site:
http://ftp.sas.com/techsup/download/blind/CI5_1AdminGuide.pdf.
The *Install Quick Reference* is available at
http://ftp.sas.com/techsup/download/blind/MA5_1InstallQuickReference.pdf.
The *Upgrade Deployment Guide* is available at
http://ftp.sas.com/techsup/download/blind/MA5_1UpgradeFrom4_4.pdf.

Finally, the *SAS Marketing Automation 5.1 Reference* is included on the installation media. To download it:

1. Insert the **SAS Marketing Automation Client Components** CD in your CD-ROM drive. If the autoplay does not start, find setup.exe (Windows) or setup.sh (UNIX) and execute it.

2. The **Choose Language** dialog opens. Select the language you would like to use and click **OK**.

3. The **SAS Marketing Automation Client Components** window opens. Select SAS Campaign Studio in the left-hand pane.

4. The SAS Campaign Studio index page opens in the right-hand pane. Download the document using the link at the end of the "Overview" section.

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