

Installation Instructions for SAS[®] Strategy Management Release 5.6 for SAS[®] 9.4



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The correct bibliographic citation for this manual is as follows: SAS Institute Inc. 2014. *Installation Instructions for SAS Strategy Management Release 5.6 for SAS 9.4*, Cary, NC: SAS Institute Inc.

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March 2014

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Chapter 1 — Getting Started

Before You Begin the Installation

SAS Software Order and SAS Software Depot

Your SAS Software Order E-Mail (SOE) will provide you with information about how to download your SAS Software Depot. Follow those instructions to download your software and create a SAS Software Depot. An instructional video for 9.4 Software Depots is available from this location: <http://support.sas.com/documentation/installcenter/gettingstarted/94/index.html>

QuickStart Guide

Your SAS Software Order E-Mail (SOE) and the SAS Download Manager instruct you to follow the steps in the *QuickStart Guide: SAS® 9.4 Planned Deployments using Electronic Software Delivery*.

A link to the *QuickStart Guide* is found in your SAS Software Order. You can also access it in the `depotsummary.html` file which is located at the top level of the SAS Software Depot.

Deployment Plan and SAS 9 Pre-Installation Checklist

This solution requires you to complete a planned installation.

Deployment Plan

A deployment plan is an XML-based description of the topology for your SAS system. The deployment plan describes the intended final SAS software environment. It is used in the SAS software deployment process to tell the SAS Deployment Wizard which software components to install and configure on each machine.

A deployment plan will be generated and provided for each deployment. The SAS Planning Application can be used only by SAS representatives. You must log in with a valid `sas.com` e-mail address before accessing the Planning Application 2.0.

Note: *If you want SAS Visual Analytics and Reporting to be installed, select SAS Strategy Management as well as SAS Visual Analytics and Reporting offerings in the planning application.*

More information about the planning application is found in the SAS Planning Application, <http://support.sas.com/planning>.

Mobile Support

If you have already installed a previous version of SAS Strategy Management and want to add mobile support, please refer to the *SAS Strategy Management Migration Guide*. If this is a new installation of SAS Strategy Management, please add the SAS Visual Analytics and Reporting to the deployment plan.

Pre-Installation Checklist

The *SAS 9 Pre-Installation Checklist* document is found in the same directory as the deployment plan and will explain the users, groups and third party software are needed on each tier of this deployment. In these instructions, “pre-installation checklist” refers to this customized document.

Migration Guides

If you have already installed SAS Strategy Management 2.4/2.4.1 and want to maintain data, please refer to the *SAS Performance Management Solutions: 9.1.3 to 9.2 Migration Guide*.

If you have already installed SAS Strategy Management 5.1 or 5.2 and want to maintain data, please refer to the *SAS Strategy Management: 5.6 Migration Guide*.

If you have already installed SAS Strategy Management 5.3 or 5.4 and want to maintain data, please refer to the *SAS Strategy Management 5.6 Migration Guide*.

Chapter 2 — Pre-Installation Steps

Steps to Perform Before You Install SAS Software

For important information about these steps, complete the pre-installation checklist and read the *SAS 9.4 Intelligence Platform Installation and Configuration Guide* which can be found here:

<http://support.sas.com/documentation/onlinedoc/intellplatform/index.html>

Operating System Users and Groups

Create the users and groups that are specified in the pre-installation checklist for each tier of your installation.

Third Party Software and System Requirements

The *QuickStart Guide* contains a link to the System Requirements on SAS Install Center. Review the system requirements for the products that you will install. Install the required third party products. SAS Strategy Management system requirements can be found here:

<http://support.sas.com/documentation/onlinedoc/stm/index.html>

The 9.4 Third Party documentation is located here:

<http://support.sas.com/resources/thirdpartysupport/v94/index.html>

JUnit Jar

Download the JUnit jar version 4.8.1 from this web site:

<http://sourceforge.net/projects/junit/files/junit/>

Note: The SAS Deployment Tester requires JUnit 4.8.1. The SAS Deployment Wizard will prompt you for the location of JUnit 4.8.1.

Python

Download Python version 2.7 from this web site:

<http://www.python.org/download/>

Note: The SAS Deployment Tester requires Python 2.6 or higher. The SAS Deployment Wizard will prompt you for the location of the Python installation1.

Windows Power Shell 2.0

Normally this software will already be installed in the Windows System32 folder, but if it needs to be downloaded and installed it can be obtained from the Microsoft Download Center:

<http://www.microsoft.com/en-us/download/details.aspx?id=20430>

UNIX Operating System Considerations (Linux, HP, SUN, AIX)

Prior to running the installation SAS Deployment Wizard script, the installer should set the following environment variables. In some installations, particularly migration scenarios, they are required.

```
LD_LIBRARY_PATH=$LD_LIBRARY_PATH:<SAS-installation-directory>
/SASWebInfrastructurePlatformDataServer/9.4/lib
LIBPATH=$LIBPATH:< SAS-installation-directory>
/SASWebInfrastructurePlatformDataServer/9.4/lib
export LD_LIBRARY_PATH
```

```
export LIBPATH
```

For example:

```
LD_LIBRARY_PATH=$LD_LIBRARY_PATH:/usr/local/install/SASHome/SASWebInfrastr  
ucturePlatformDataServer/9.4/lib
```

```
LIBPATH=$LIBPATH:/usr/local/install/SASHome/SASWebInfrastructurePlatformD  
ataServer/9.4/lib
```

```
export LD_LIBRARY_PATH
```

```
export LIBPATH
```

AIX Operating System Consideration

When installing SAS Strategy Management on the AIX operating system, do not use symbolic links (symlinks). If they are used, certain aspects of SAS Strategy Management may not work properly because parts of Base SAS may not work properly. This has been observed with Export to IMaps but the problem could manifest itself with any software that runs a stored process.

There are some other considerations in addition to the requirements discussed in <http://support.sas.com/documentation/onlinedoc/stm/index.html>

Chapter 3 — Install and Configure SAS Software

SAS Deployment Wizard

Adding SAS Strategy Management to an Existing SAS 9.4 Intelligence Platform Deployment

Follow the steps outlined in *SAS 9.4 Intelligence Platform Installation and Configuration Guide* “Managing your SAS Deployment: Adding SAS Products,” which can be found in these two locations:

<http://support.sas.com/documentation/cdl/en/biig/63852/PDF/default/biig.pdf>

or

<http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm#titlepage.htm>

If the deployment has been configured with only a single managed server, the web application server must be temporarily removed from your deployment. During the add-on of SAS Strategy Management, redeploy the web application server with *all* of your web applications. For more information, refer to the instructions in the *SAS 9.4 Intelligence Platform and Configuration Guide Appendix 4* “Adding SAS Products.”

SAS Deployment Wizard

The *QuickStart Guide* explains how to launch the SAS Deployment Wizard. Use the SAS Deployment Wizard Help and SAS 9.4 Intelligence Platform documentation to guide you as needed. In addition, see the *SAS Deployment Wizard and SAS Deployment Manager 9.4: User’s Guide*:

<http://support.sas.com/documentation/installcenter/en/ikdeploywizug/66034/PDF/default/user.pdf>

Installation on Two Tiers (Data Tier/Mid-Tier and Client Tier)

Before You Begin the Data Tier and Mid-Tier on a Single Server

Refer to the *SAS 9.4 Intelligence Platform Installation and Configuration Guide* for more detailed information about the installation:

<http://support.sas.com/94administration>

Verify External Users and Groups

1. Verify that the following users have been created on the data tier as instructed in the pre-installation checklist.

SAS Installer	mydomain\installer-ID
SAS Spawned Servers account	mydomain\sassrv
SAS First User	mydomain\sasdemo
SAS Server Users group	SAS Server Users

- On Windows, the SAS Installer account should be available in the long term for future SAS maintenance.

- On AIX, make sure that the **User can LOGIN?** setting is set to *true* for the SAS Installer ID.
 - On UNIX, do not use root as the SAS Installer account.
2. Follow the instructions for your platform:
- On Windows, verify that SAS Server Users group has the user right “Log on as a batch job.” The SAS Spawned Servers Account (sassrv) can be added to this group to obtain this right or it can be assigned by the SAS Deployment Wizard.
 - On UNIX, verify that the SAS Spawned Servers and SAS Installer account are members of the same group and that the group is the primary group for both groups. Refer to the pre-installation steps for the mid-tier:
<http://support.sas.com/resources/thirdpartysupport/v94/appservers/preinstall.html>

Software Deployment Wizard for Data Tier and Mid-Tier on a Single Server

1. In the **Select Products to Install** dialog, select “Server and Middle Tier” as the machine.
2. At the **Specify SAS PC Files Service Options** dialog, check “Start Service Now and Automatically when Windows Starts.”
Note: This needs to be manually included by selection in the installation plan; as of SAS 9.4 it is no longer automatically included when only the recommended software list is selected during plan generation.
3. Select *Typical* in the **Select Configuration Prompting Level** dialog. If the default values are appropriate for your site, you can accept many of the SAS Deployment Wizard dialogs as they are presented. Noted below are changes that need to be made.
Note: If you select “Custom” for the prompting level, do not check the checkbox to **Secure JMS Resources** in the dialog **Web Application Server: Secure JMS Resources**.
4. For the solution-specific dialogs listed below, the following information supplements the help screens:
 - A. For SAS Strategy Management: SPM Database Configuration dialog.
The default database account identity is spmdbadm. Enter a userid and password. This is not an operating system account but is used to secure and access the PostgreSQL SPM database
 - B. For SAS Environment Manager: Administration Database Configuration.
The default database account identity is: adminowner. Enter a userid and password.
 - C. SAS Visual Analytics Services Database Credentials
The default database account identity is vtadm. Enter a userid and password.
The dialog will be present if either VA Report Services or the full VA product is installed with SAS Strategy Management.
 - D. SAS Visual Data Builder Database Credentials
The default database account identity is vdbadm. Enter a userid and password.
The dialog will be present if either VA Report Services or the full VA product is installed with SAS Strategy Management.

- E. Define the **webanon** user during configuration as some Strategy Management web services including the diagram Correlation Analysis require it to function properly.

To the Anonymous Web Access SAS Deployment Wizard prompt, check the Enable Anonymous Web Access checkbox and in the next SAS Deployment Wizard prompt screen for the Anonymous User, supply the credentials for the SAS Internal Account: SAS Anonymous Web User. The default userid: webanon@saspw is fine but a password needs to be entered.

5. At the Deployment Summary dialog, press **Start**.

Client Tier

On the **Select Products to Install** dialog, select “Client Tier” as the machine and respond to the prompts. You will need to enter the host and port of the SAS Metadata Server.

Installation on Three Tiers (Data Tier, Mid-Tier and Client Tier)

Before You Begin the Data Tier

For more detailed information about the installation, refer to the *SAS 9.4 Intelligence Platform Installation and Configuration Guide*: <http://support.sas.com/94administration>

Verify External Users and Groups

1. Verify that the following users have been created on the data tier as instructed in the pre-installation checklist.

SAS Installer	mydomain\installer-ID
SAS Spawnd Servers account	mydomain\sassrv
SAS First User	mydomain\sasdemo
SAS Server Users group	SAS Server Users

 - On Windows, the SAS Installer account should be available in the long term for future SAS maintenance.
 - On AIX, make sure that the **User can LOGIN?** setting is set to *true* for the SAS Installer ID.
 - On UNIX, do not use root as the SAS Installer account.
2. Follow the instruction for your platform:
 - On Windows, verify that SAS Server Users group has the user right “Log on as a batch job.” The SAS Spawnd Servers Account (sassrv) can be added to this group to obtain this right or it can be assigned by the SAS Deployment Wizard.
 - On UNIX, verify that the SAS Spawnd Servers and SAS Installer account are members of a same group and that group is the primary group for both groups.

Software Deployment Wizard for Data Tier

1. Select *Server* as the machine in the “**Select Products to Install**” dialog.
2. At the **Specify SAS PC Files Service Options** dialog, check “Start Service Now and Automatically when Windows Starts.”

- Note:** This needs to be manually included by selection in the installation plan; as of SAS 9.4 it is no longer automatically included when only the recommended software list is selected during plan generation
3. Specify *Typical* in the **Select Configuration Prompting Level** dialog. If the default values are appropriate for your site, you can accept many of the SAS Deployment Wizard dialogs as they are presented. Noted below are changes that need to be made.
 4. For the solution-specific dialogs listed below, the following information supplements the help screens:
 - A. For SAS Strategy Management: SPM Database Configuration dialog
The default database account identity is spmdbadm. Enter a userid and password. This is not an operating system account but is used to secure and access the PostgreSQL SPM database.
 - B. SAS Visual Analytics Services Database Credentials
The default database account identity is vtadm. Enter a userid and password. The dialog will be present if either VA Report Services or the full VA product is installed with SAS Strategy Management.
 - C. SAS Visual Data Builder Database Credentials
The default database account identity is vdbadm. Enter a userid and password. The dialog will be present if either VA Report Services or the full VA product is installed with SAS Strategy Management.
 - D. Define the webanon user during configuration as some Strategy Management web services including the diagram Correlation Analysis require it to function properly.

To the Anonymous Web Access SAS Deployment Wizard prompt, check the Enable Anonymous Web Access checkbox and in the next SAS Deployment Wizard prompt screen for the Anonymous User, supply the credentials for the SAS Internal Account: SAS Anonymous Web User. The default userid: webanon@saspw is fine but a password needs to be entered.
 5. At the **Deployment Summary** dialog press **Start**.

Before You Begin the Mid-Tier

Verify Third Party Products

Verify that your web browser is on the list of browsers supported by SAS. The list is updated as new software is tested and approved. For the latest information, please select the link for Web Browsers and Plug-Ins at

<http://support.sas.com/resources/thirdpartysupport/index.html>.

Software Deployment Wizard for Mid-Tier

1. In the **Select Products to Install** dialog, select “Middle Tier” as the machine.
2. After the **Review Required Software** dialog, you will be prompted for third-party software. If the locations you chose were not the default locations, refer to the notes you made on your pre-installation checklist.
3. Specify *Typical* in the **Select Configuration Prompting Level** dialog. If the default values are appropriate for your site, you can accept many of the SAS Deployment Wizard dialogs as they are presented. Noted below are changes that need to be made.

- Note:** *If you select "Custom" for the prompting level, do not check the checkbox to **Secure JMS Resources** in the dialog **Web Application Server: Secure JMS Resources***
4. In the **SAS Metadata Server** dialog, enter or change the server name to the fully qualified hostname of the data tier server.
 5. For the solution-specific dialogs listed below, the following information supplements the help screens:
 - A. SAS Web Infrastructure Platform Database Server, specify the Platform's PostgreSQL database instance host, port and administrative credential. The default administrative userid is dbmsowner
 - B. For SAS Strategy Management: SPM Database Configuration dialog, the default database account identity is spmdbadm. Enter a userid and password. This is not an operating system account but is used to secure and access the PostgreSQL SPM database.
 6. At the **Deployment Summary** dialog, press **Start**.

Client Tier

On the **Select Products to Install** dialog, select "Client Tier" as the machine and respond to the prompts. You will need to enter the host and port of the SAS Metadata Server.

Chapter 4 — SAS PC Files Server

SAS PC Files Server is mandatory for 64-bit Windows installations and optional for UNIX installations. It enables users to load data from 32-bit PC files into 64-bit SAS. With this configuration, data administrators can use Microsoft Excel or Microsoft Access files as input to jobs in SAS Data Integration Studio.

This chapter explains how to install SAS PC Files Server and how to use a Microsoft Office file as a data source in SAS Data Integration Studio.

Install PC Files Server

Starting with SAS Strategy Management 5.6, SAS PC Files Server is not automatically included in the recommended product list for an installation plan file that includes SAS Enterprise Business Intelligence, SAS Strategy Management, and SAS Visual Analytics Report Services. As a result, you must do one of the following:

- manually include SAS PC Files Server in your original installation plan
- run the SAS Deployment Wizard and select Install Additional Software to install SAS PC Files Server

Install the Microsoft Office 2007 ODBC Driver

On the server where you installed SAS PC Files Server, install the Microsoft Office 2007 ODBC driver, which works with both Office 2007 and Office 2003 files.

To download the driver, refer to SAS Note 37521 “ODBC driver-manager errors occur when you use the SAS® 9.2 PC Files Server with the EXCELCS or the ACCESSCS engines” at <http://support.sas.com/kb/37/521.html>.

Validate the Configuration Changes

To validate the changes that you made, follow these instructions for importing a Microsoft Excel file.

Note: The file to be imported must reside on the system where SAS PC Files Server is installed, and it must be accessible from the data tier.

Add a Library

Add a library for the imported files by completing the following steps:

1. Log on to SAS Data Integration Studio as a data administrator.
2. On the **Inventory** tab, right-click the **Library** folder and select **New Library**.
3. Select **Resource Templates -> Libraries -> Generic Library**. Click **Next**.
4. Enter a name for the library.
5. Click **Browse** and select a location for the library. Click **Next**.
6. From the Available Servers list, select SASApp. Click **Next**.
7. On the Library properties page, enter the following values:
 - A. **Libref:** Enter a libref with a maximum of 8 characters.
 - B. **Engine Type:** Enter `pcfiles`.

- C. **Other Options:** Enter the path to the file that you want to import and the port number for SAS PC Files Server. If the file is on a server other than the data tier, enter the server name. For example:

```
path="C:\MyFiles\myfile.xlsx" port=9621 server=servername
```

For more information, see *SAS/ACCESS 9.4 Interface to PC Files: Reference* at <http://support.sas.com/documentation>

8. Click **Next**.
9. Review your selections and click **Finish**.

Register the Excel File

Register the Excel file that you want to import by completing the following steps:

Note: You cannot register tables as the unrestricted user.

1. Right-click the new library and select **Register tables**.
2. Select the following options:
 - A. **Enable case-sensitive**
 - B. **Enable special characters**
3. Select the tables to register.
4. Click **Next**.
5. Review your selections and click **Finish**.

Chapter 5 — Post-Configuration Guide

After you complete the installation and configuration of your software, follow the post-configuration steps in Chapter 2 of the *SAS Strategy Management 5.6 System Administration Guide, Second Edition* which can be found here:

<http://support.sas.com/documentation/onlinedoc/stm/index.html>

The *SAS 9.4 Intelligence Platform: System Administration Guide* provides additional general information on System Administration and can be found here:

<http://support.sas.com/94administration>

For application server clustering support there are some post-installation issues for Strategy Management that required contacting Technical Support for the relevant release-dependent usage note.

Removing Configurations

When you remove just the configuration of SAS Strategy Management without the whole SAS platform being affected, SASServer1 instances should remain active. This facilitates removal of spmmidtier installation content.

However, if you receive a deletion error for `sas.strategy.management5.6.par` or `sas.strategy.dashboard5.6.par` files when the spmportlet configurations are removed, reply **yes** to the SAS Deployment Wizard to continue.

After the configurations are removed and at your convenience, but before you re-install or reconfigure SAS Strategy Management, shut down all SASServer1 instances, and from

```
<!SAS Config><Level>/Web/Applications/SASPortlets4.4/Deployed
```

manually delete the following files:

```
sas.strategy.management5.6.par and  
sas.strategy.dashboard5.6.par files
```




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