

Installation and Configuration Instructions for SAS[®] Enterprise Miner[™] 5.3



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Installation and Configuration Instructions for SAS® Enterprise Miner™ 5.3

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Overview

SAS Enterprise Miner must be installed via the **Planning** process. A `plan.xml` file is required. Sample plans are available within your deployment tools. This document describes two installation and configuration scenarios for SAS Enterprise Miner 5.3 as well as upgrade instructions:

- SAS Enterprise Miner Personal Workstation on page 3
- SAS Enterprise Client Multi-Machine Deployment on page 7

Important: *If you are upgrading from version 5.2 of SAS Enterprise Miner, refer to “Upgrading from SAS Enterprise Miner 5.2 to SAS Enterprise Miner 5.3” on page 17.*

There are several sample plans available to help you. The sample plans are selectable from the **Deployment Plan** window during your installation. If one of the sample plans does not meet your deployment criteria, contact your SAS representative for assistance in creating an appropriate Plan file prior to beginning your installation.

Plan Name	Plan Description	Contents
Enterprise Miner, one machine	Enterprise Miner on one machine	SAS Enterprise Miner and minimum required components for single machine.
Enterprise Miner and Text Miner, one machine	Enterprise Miner and Text Miner on one machine	SAS Enterprise Miner, SAS Text Miner and required components for single machine.
Enterprise Miner, two machines	Enterprise Miner on two machines	SAS Enterprise Miner and minimum required components to be installed on two tiers: server and client,
Enterprise Miner and Text Miner, two machines	Enterprise Miner and Text Miner on two machines	SAS Enterprise Miner, SAS Text Miner and required components to be installed on two tiers: server and client.
Enterprise Miner Upgrade, one machine	Enterprise Miner upgrade from 5.2 to 5.3 on one machine	Components necessary to upgrade from SAS Enterprise Miner 5.2 to SAS Enterprise Miner 5.3 on one machine.
Enterprise Miner Upgrade, two machines	Enterprise Miner upgrade from 5.2 to 5.3 on two machines	Components necessary to upgrade SAS Enterprise Miner 5.2 to 5.3 on two tiers: server and client.
Enterprise Miner and Text Miner Upgrade, one machine	Enterprise Miner and Text Miner upgrade from 5.2 to 5.3 on one machine	Components necessary to upgrade from SAS Enterprise Miner 5.2 to 5.3 and SAS Text Miner on one machine.
Enterprise Miner and Text Miner Upgrade, two machines	Enterprise Miner and Text Miner upgrade from 5.2 to 5.3 on two machines	Components necessary to upgrade from SAS Enterprise Miner 5.2 to 5.3 and SAS Text Miner on two tiers: server and client.

Plan Name	Plan Description	Contents
Data Mining for the Classroom	Enterprise Miner on one machine for classroom deployment.	SAS Enterprise Miner and minimum required components on a single machine for the SAS Data Mining for the Classroom license.
Enterprise Miner Desktop	Enterprise Miner Desktop, single machine deployment	SAS Enterprise Miner Desktop and minimum required components on a single machine.

SAS Enterprise Miner Personal Workstation

Note: This installation scenario is also appropriate for SAS Data Mining for the Classroom as well as SAS Enterprise Miner Desktop.

This configuration is for installing SAS Enterprise Miner and all components on which it depends on one single computer. Uses for this configuration include demos, education, and individual modeling.

Basic Requirements for the Personal Workstation Installation

Windows version	Windows XP, Windows 2000, or Windows for 64-Bit Itanium-based Systems. Windows XP Home is not supported.
Windows user name	The user must be a member of the Administrators group. This user should be created before running the SAS Software Navigator.
Windows password	You must declare a password for your user name. The password may not contain more than one \$ character.

Installing the SAS Enterprise Miner Personal Workstation

Follow these steps to install SAS Enterprise Miner Personal Workstation:

1. Locate your SAS installation data file (SID file). You should have received it via a Software Order E-mail (SOE).
2. Begin the install by inserting the SAS Software Navigator CD.
3. Select **Personal** as the type of deployment.
4. Specify the file location for your SID file when prompted.
5. In the **Plan Deployment** window, select **Enterprise Miner, one machine**.

Note: If your license also includes SAS Text Miner, select the **Enterprise Miner and Text Miner, one machine** plan in the **Deployment** window.

6. Continue to follow the prompts from the SAS Software Navigator, including the System Requirements Wizard and the InstallShield Wizard. Read each screen carefully and provide the necessary information.

Note: Accepting the default settings in these windows is appropriate.

7. The SAS Software Navigator will progress through the list of products to be installed. Several of the products have silent installs, meaning they do not require any user input. Other product installations may prompt for user input, to which you may accept the default values.

Note: During the SAS 9.1 Foundation installation you are prompted with a language selection window. Make certain you select **English with DBCS and Unicode support** if you need this functionality, such as for use with documents being passed to SAS Text Miner.

8. The last step will be to run the SAS Configuration Wizard. Again, follow each step carefully.
9. Select **Single Account** when prompted to select one account or multiple accounts.

Note: In some cases you may not receive this prompt. If you do not receive this prompt, proceed with the next step.

10. The configuration process utilizes the user ID that was used when logging on to this machine to complete the configuration. Supply the correct password for this account when prompted.

Note: If SAS Text Miner is also included in your deployment scenario, complete the post-installation tasks for SAS Text Miner by referring to the following Web page:
<http://support.sas.com/documentation/onlinedoc/txtminer/>.

Post-Installation Steps

Note: The path names in this document are based on the sample SAS Enterprise Miner plan. If this plan is used during the installation, the default configuration directory is named 'EMiner'; if not, the configuration directory will be different and should be substituted for 'EMiner' in the path.

1. Stop the SAS services in the following order:

Start → Programs → SAS → EMiner → Stop SAS Object Spawner

Start → Programs → SAS → EMiner → Stop SAS Metadata Server

2. Apply the following hotfixes from the SAS Technical Support Hotfix site to your system:

E9BB61

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB61

This fix for the SASMSG function is required by SAS Enterprise Miner 5.3. Apply this fix to the SAS Server image.

E9BB91

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB91

This fix will resolve a ClassFormatError exception found when executing the SAS Enterprise Miner score code where coded characters contain umlauts. Apply this fix to the SAS Server image.

E9BC17

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC17

This fix will resolve a problem where the SAS Enterprise Miner Java client hangs at the SAS Enterprise Miner splash screen after submitting log on to SAS Analytics Platform.

Apply the latest SAS Enterprise Miner 5.3 hot fixes

http://ftp.sas.com/techsup/download/hotfix/em_home.html

Apply the latest SAS Enterprise Guide 4.1 hot fixes

http://ftp.sas.com/techsup/download/hotfix/ent_guide41.html

Apply the latest SAS Analytics Platform 1.4 hot fixes

http://ftp.sas.com/techsup/download/hotfix/apcore_home.html

If you are running SAS Text Miner 3.2, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/tmine_home.html

If you are running SAS Credit Scoring for Enterprise Miner 5.3, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/credscem_home.html

3. Restart the SAS services in the following order:

Start → Programs → SAS → EMiner → Start SAS Metadata Server

Start → Programs → SAS → EMiner → Start SAS Object Spawner

4. If SAS Text Miner is also included in your deployment scenario, complete the post-installation tasks for SAS Text Miner by referring to the following Web page:

<http://support.sas.com/documentation/onlinedoc/txtminer/>

5. Merge the SAS Enterprise Miner Smart Object from the SAS Analytics Platform.

Merging the SAS Enterprise Miner Smart Object is necessary in order for users to register SAS Enterprise Miner models to the SAS Metadata Server for integration with other applications. In order to perform the merge, you'll need to know the installation location of the SAS Enterprise Miner `smartobject.xml` file. The default location is:

Windows: `C:\Program Files\SAS\SASAPCore\apps\EnterpriseMiner\conf`

- a. Start SAS Enterprise Miner by selecting

Start → Programs → SAS → SAS Enterprise Miner 5.3 → Enterprise Miner.

In the **Log On** window, select **Personal Workstation**, enter your **User Name** and **password**, and then click **Log On**. This step will deploy the SAS Foundation Services Manager required by the merging of the Smart Object.

- b. If the SAS Management Console is not open, start it by selecting

Start → Programs → SAS → SAS Management Console 9.1.

Log in.

- c. Expand the following folders: **Environment Management → Foundation Services Manager → Analytics Platform - Foundation Services → Core Services**

Note: If SAS Management Console was open prior to starting SAS Enterprise Miner, you may need to right-click on **Foundation Services Manager** and select **Refresh** for the Analytics Platform service to appear.

- d. Right-click on **Information Service** and select **Merge Service Configuration**.
- e. Navigate to the location noted above, select the `smartobject.xml` file, and then click **Open** to merge.

When this step is finished, the SAS Enterprise Miner Smart Object merge will be complete.

6. Once these steps are complete, the metadata server and object spawner should be running and you should be able to launch SAS Enterprise Miner.

You can further customize your SAS Enterprise Miner environment. Please refer to the SAS Enterprise Miner online help for more information.

Note: If you desire to produce Java Score code through SAS Enterprise Miner, please read and follow the platform-specific directions in SAS Note SN-014569 available at <http://support.sas.com/kb/14/569.html>.

SAS Enterprise Client Multi-Machine Deployment

This configuration describes a SAS Enterprise Client, Multi-Machine deployment (with optional Java Web Start Deployment and Model Viewer).

There are two optional features in SAS Enterprise Miner 5.3 that make use of the embedded HTTP server feature of the SAS Analytics Platform. By default this feature is enabled. Refer to the *Administrator's Guide for SAS Analytics Platform 1.4* (<http://support.sas.com/documentation/onlinedoc/apcore>) for more details.

- **Java Web Start.** SAS Enterprise Miner 5.3 client files can be deployed via Java Web Start.

Note: *The SAS Enterprise Miner Tree Desktop Application allows interactive training of decision trees in SAS Enterprise Miner 5.3. In order to use interactive training, the SAS Enterprise Miner Tree Desktop Application must be installed on the client machine. This application is installed separately from the SAS Enterprise Miner Client and is not deployed via Java Web Start.*

- **SAS Enterprise Miner Model Viewer, model registration and storage functions.** Users may register models to the SAS metadata server for integration with applications such as SAS Enterprise Guide, SAS Data Integration Studio, and SAS Model Manager. The SAS Enterprise Miner Model Viewer can be used to present a streamlined view of the Mining Models that are registered in the SAS Metadata Server. Users access the Web View functionality through the SAS Analytics Platform Configuration Web page by selecting the Enterprise Miner link. A SAS Metadata Server username and password are required.

Optionally, a web DAV server may be used to store the SAS Enterprise Miner Model Package when the model is registered. To enable this feature you must have an installed and configured web DAV server and specify the URL to that web DAV server in the Model Folder properties within the SAS Management Console. For more details on the Model Folder properties, refer to the “Customizing SAS Enterprise Miner Metadata Using the Enterprise Miner Plug-in for SAS Management Console” section in the “Administering SAS Enterprise Miner” chapter in the *SAS 9.1.3 Intelligence Platform: Desktop Application Administration Guide* available at

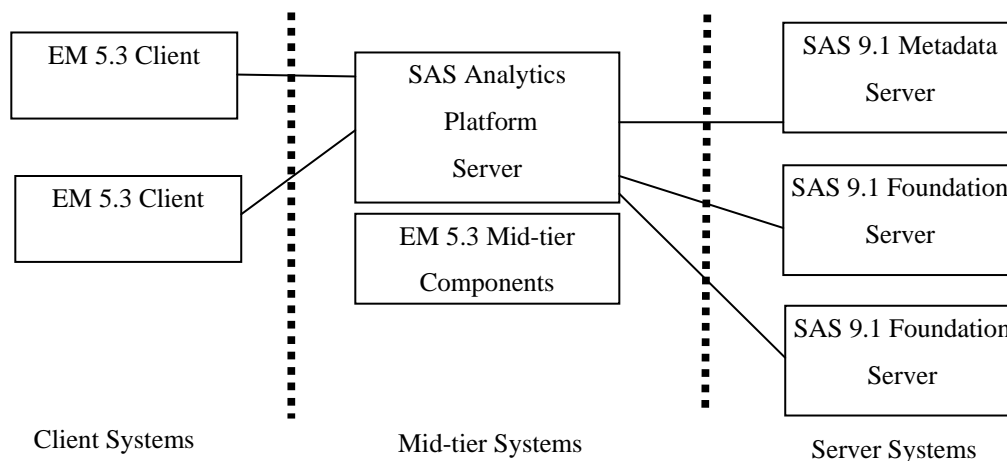
<http://support.sas.com/documentation/configuration/bidaag.pdf>.

You can go directly to this information in the SAS OnlineDoc version of this document here:

<http://support.sas.com/onlinedoc/913/getDoc/en/bidaag.hlp/a003088881.htm>.

Note: *SAS Enterprise Miner 5.3 has full data mining capabilities without the use of a Web server. These options can also be added at a later time.*

Diagram of a Typical Multi-Machine Installation Setup



This configuration is for installing SAS Enterprise Miner and all components on which it depends on two or more computers. The typical use for this configuration is collaborative modeling which requires heavier computational power than a desktop/laptop machine can provide, sharing models and computational resources among several users.

Using this configuration, the client can disconnect from a project and leave project flows running. While flows are running, the bulk of the personal client platform is available for other work while waiting, whether connected to the project or not.

In a Multi-Tier Server environment, various server configurations may be used. For example, you could have a separate Metadata Server machine, several Workspace Server machines and a separate Web Server/Mid-Tier machine. The clients may be executed on satellite machines, in which case only Java has to be installed on each machine. Alternatively, clients may be launched from terminal services or X-Window sessions on the same machine as the shared platform server. In this case the only requirement for client machines is to have a compatible communication method; for example, a desktop workstation with Hummingbird Exceed X-Windows server and the client launches from a telnet session on the same server machine.

Note: *If you would like to deploy over several server machines, your Account Team will work with you to develop a deployment plan for your site. You must obtain a custom plan from your Account Team prior to beginning this install.*

You also have the option to deploy SAS Enterprise Miner 5.3 client files to the client machines via Java Web Start, by enabling the embedded HTTP server feature of the SAS Analytics Platform. By default this feature is enabled. Refer to the *Administrator's Guide for SAS Analytics Platform* (<http://support.sas.com/documentation/onlinedoc/apcore>) for more details.

Note: *The SAS Enterprise Miner Tree Desktop Application allows interactive training on decision trees in SAS Enterprise Miner 5.3. In order to use interactive training, the SAS Enterprise Miner Tree Desktop Application must be installed on the client machine. This application is installed separately from the SAS Enterprise Miner Client and is not deployed via Java Web Start.*

SAS Enterprise Miner 5.3 (Multi-Tier Deployment)

Pre-Installation Steps

Complete the following steps prior to launching the SAS Software Navigator to install SAS Enterprise Miner.

1. As a minimum, you need to create the following operating system user accounts before you install and configure SAS Enterprise Miner:
 - SAS Administrator (sasadm)
 - SAS Trusted User (sastrust)
 - SAS Demo User (sasdmo)
 - SAS Guest User (sasguest)
 - SAS General Server User (sassrv)

For more information on the Pre-installation checklist, refer to

<http://support.sas.com/documentation/configuration/biicl.pdf>

For information on creating these users, see “Setting Up Required Users and Groups” in the *SAS Intelligence Platform: Installation Guide* available at

<http://support.sas.com/documentation/configuration/biig.pdf>. This

document is also available in SAS OnlineDoc format at

http://support.sas.com/onlinedoc/913/docMainpage.jsp?_topic=biig.hlp/a003070261.htm

2. **For Windows installations only**, create a group named **SAS Server Users** and add the preceding “sas” user accounts to it.
3. **For Windows installations only**, give the **SAS Server Users** group the user right “Log on as a Batch Job.”

Note: *All SAS Enterprise Miner users will need this user right as well. You can add your SAS Enterprise Miner users as members of the SAS Server Users group or create a separate group for the SAS Enterprise Miner Users and give this group the “Log on as a Batch Job” user right.*
4. Locate your SAS installation data file (SID file). You should have received it via a Software Order E-mail (SOE).
5. Obtain a custom plan file from your SAS representative if the available sample plans do not fit your deployment scenario.

Installation Steps

Note: *The SAS Analytics Platform Server is not supported on a Solaris for X64 machine; therefore, the standard SAS Enterprise Miner Two-Tier sample deployment plan is not appropriate. You may contact your SAS representative for a plan that is appropriate for this environment.*

You are now ready to begin installing SAS Enterprise Miner and its required components.

1. Perform all steps in the Pre-Installation checklist and refer to the chapter “Setting up Required Users and Groups” in the *SAS 9.1.3 Intelligence Platform: Installation Guide*, available at <http://support.sas.com/documentation/configuration/biig.pdf>. This document is also available in SAS OnlineDoc format at http://support.sas.com/onlinedoc/913/docMainpage.jsp?_topic=biig.hlp/a003070261.htm.

2. Launch the **SAS Software Navigator** from the SAS Software Depot or media. Select **Create a Software Depot**, which will enable you to install the software that you received from SAS over the network, rather than from CDs. A SAS Software Depot is a directory on the network from which you can install software on a set of machines running the same operating system. The SAS Software Depot must be built in a directory that is accessible to the set of machines on which you are installing the software.

Note: *This step is optional but highly recommended.*

Repeat steps 3–10 for each machine on which you are installing (computational server machine, Metadata Server machine, Mid-Tier Server machine, and client machine). If your metadata server is installed on a separate machine from your other servers, it is best to begin by installing on the metadata server machine.

3. Start the SAS Software Navigator from the Software Depot (or media) to install on the desired machine.
4. Select **Advanced** as the type of deployment.
5. Specify the file location for your SID file.
6. In the **Plan Deployment** window you may select **Enterprise Miner on two machines** or other appropriate sample plan from the list of sample plans, or point to the location of a **customized plan** created by your SAS representative.
7. Select the appropriate machine from the list (ServerTier, ClientTier), depending on which machine you are installing, when prompted to select your installation options.

Note: *When installing on the Client Tier, deselect **SAS Configuration Wizard** from the **Selected Software** window.*

Note: *If you wish to deploy the SAS Enterprise Miner client files via Java Web Start, you do not need to perform a planned installation on the client machine. As noted previously, the SAS Enterprise Miner Tree Desktop Application is not deployed via Java Web Start and requires a separate install. You can install this application from the **Client Side Components CD, Volume 1 (CLIENT1CD** in your SAS Software Depot) or you can download the application from the following web site:*

<http://www.sas.com/apps/demosdownloads/setupcat.jsp;jsessionid=6F246D6E6A988B749F080F15599DF96E.tomcat2?cat=Enterprise+Miner>.

Make sure to run the System Requirements Wizard prior to installing this application.

8. Continue to follow the prompts from the SAS Software Navigator, including the System Requirements Wizard and the InstallShield Wizard. Read each screen carefully and provide the necessary information.

Note: *During the SAS 9.1 Foundation installation, you are prompted with a language selection window. Make certain you select **English with DBCS and Unicode support** if you need this functionality, such as for use with documents being passed to SAS Text Miner.*

9. The SAS Software Navigator will progress through the list of products to be installed. Several of the products have silent installs, meaning they do not require any user input. Others product installations may prompt for user input, to which you may accept the default values.
10. The last step will be to run the SAS Configuration Wizard. Again, follow each step carefully.

After the installation and configuration steps complete within SAS Software Navigator, the manual configuration steps will begin. At this point, continue with the configuration steps described in the `instructions.html` file generated by the SAS Configuration Wizard. Read and complete each step carefully.

Post-Installation Steps

On the Metadata and Computational Servers

Note: All currently active SAS sessions, daemons, spawners and servers must be terminated before applying hotfixes.

1. Apply the following hotfixes from the SAS Technical Support Hotfix site to your system:

E9BB61

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB61

This fix for the SASMSG function is required by SAS Enterprise Miner 5.3. Apply this fix to the SAS Server image.

E9BB91

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB91

This fix will resolve a ClassFormatError exception found when executing the SAS Enterprise Miner score code where coded characters contain umlauts. Apply this fix to the SAS Server image.

E9BC09 (for AIX)

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC09

This fix resolves performance problems and errors found when running very large SAS DATA STEP programs such as those generated by the Interactive-Grouping node in SAS Enterprise Miner. Apply this fix to the SAS server image.

E9BC17

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC17

This fix will resolve a problem where the SAS Enterprise Miner Java client hangs at the SAS Enterprise Miner splash screen after submitting log on to SAS Analytics Platform.

Apply the latest SAS Enterprise Miner 5.3 hot fixes

http://ftp.sas.com/techsup/download/hotfix/em_home.html

Apply the latest SAS Enterprise Guide 4.1 hot fixes

http://ftp.sas.com/techsup/download/hotfix/ent_guide41.html

Apply the latest SAS Analytics Platform 1.4 hot fixes

http://ftp.sas.com/techsup/download/hotfix/apcore_home.html

If you are running SAS Text Miner 3.2, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/tmine_home.html

If you are running SAS Credit Scoring for Enterprise Miner 5.3, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/credscem_home.html

SAS Note SN-014569

<http://support.sas.com/kb/14/569.html>

This SAS Note details the platform-specific directions of modifying the SAS configuration file to add an environment variable for creating Java scoring code from SAS Enterprise Miner.

2. Add additional users in the SAS Management Console for SAS Enterprise Miner. To do so, complete the following steps:
 - a. Start the SAS Metadata service if it has not already been started.
 - b. Log on to SAS Management Console by opening a metadata profile with your *administrative user* account (or with the *unrestricted user* account).
 - c. In the navigation panel of SAS Management Console, select **User Manager**.
 - d. Open the New User properties dialog box by selecting this path from the menu bar: **Actions → New → User**.
 - e. On the **General** tab, enter the user's name in the **Name** field. The other fields on this tab are optional.
 - f. On the **Logins** tab, do the following: Add a login that the metadata server can use to determine the user's metadata identity. This login must contain the fully qualified form of the user ID for the primary account. If this login will be used to provide access to other servers from applications that do not cache credentials, include the password and specify the **DefaultAuth** authentication domain.
 - g. On the **Groups** tab, define the user's group memberships. Each user can belong to multiple groups.
 - h. Click **OK** to save and close the user definition.

Note: For more information, refer to the SAS 9.1.3 Intelligence Platform Security Administration Guide at <http://support.sas.com/documentation/configuration/bisecag.pdf>.

Note: If SAS Text Miner is also included in your deployment scenario, complete the post-installation tasks for SAS Text Miner by referring to the following web page: <http://support.sas.com/documentation/onlinedoc/txtminer/>.

On the Mid-Tier Server

1. Configure the SAS Analytics Platform server.

Specify the **sasadm** user account when prompted and be sure to check the box **Remember password** in order to store your credentials. If you do not store your credentials, then you cannot run the SAS Analytics Platform as a service or background process. Accept all the default values and settings.

On Windows platforms you can configure the server by selecting

Start → Programs → SAS → SAS Analytics Platform → AP Server Advanced Configuration.

On UNIX platforms you should run the **apserver** script in an XWindow session as follows:

```
./apserver config
```

Note: On UNIX, the **apserver** script is typically found in the following location:

```
<installdir>/SASAPCore/bin
```

For more information about the SAS Analytics Platform, see the *Administrator's Guide for SAS Analytics Platform* at the following Web address:

<http://support.sas.com/documentation/onlinedoc/apcore>

2. Create a Foundation Service Manager Entry for the SAS Analytics Platform.

To create an entry in the Foundation Services Manager with in the SAS Management Console, you must start and stop the SAS Analytics Platform.

- a. Start the SAS Analytics Platform.

On Windows Platforms, you can start the server by selecting

Start → Programs → SAS → SAS Analytics Platform → Start AP Server

On UNIX platforms, you should start the server by running the **apserver** script, which is typically located at `<installdir>/SASAPCore/bin`. You should run the script in an XWindow session as follows:

./apserver start &

- b. Stop the SAS Analytics Platform.

On Windows Platforms, you can start the server by selecting

Start → Programs → SAS → SAS Analytics Platform → Stop AP Server

On UNIX platforms, you should stop the server by running the **apserver** script as follows:

./apserver stop

3. Merge the SAS Enterprise Miner Smart Object from the SAS Analytics Platform.

Merging the SAS Enterprise Miner Smart Object is necessary in order for users to register SAS Enterprise Miner models to the SAS Metadata Server for integration with other applications. In order to perform the merge, you'll need to know the installation location of the SAS Enterprise Miner `smartobject.xml` file. The default location is:

Windows: `C:\Program Files\SAS\SASAPCore\apps\EnterpriseMiner\conf`

UNIX: `<installdir>/SASAPCore/apps/EnterpriseMiner/conf`

- a. If the SAS Management Console is not open, start it by selecting

Start → Programs → SAS → SAS Management Console 9.1.

Log in.

- b. Expand the following folders: **Environment Management → Foundation Services Manager → Analytics Platform - Foundation Services → Core Services**

Note: If SAS Management Console was open prior to configuring the SAS Analytics Platform, you may need to right-click on **Foundation Service** and select **Refresh** for the Analytics Platform service to appear.

- c. Right-click on **Information Service** and select **Merge Service Configuration**.
- d. Navigate to the location noted above, select the `smartobject.xml` file, and then click **Open** to merge.

When this step is finished, the SAS Enterprise Miner Smart Object merge will be complete.

4. Apply the appropriate hot fixes.

Apply the latest SAS Enterprise Miner 5.3 hot fixes

http://ftp.sas.com/techsup/download/hotfix/em_home.html

Apply the latest SAS Enterprise Guide 4.1 hot fixes

http://ftp.sas.com/techsup/download/hotfix/ent_guide41.html

Apply the latest SAS Analytics Platform 1.4 hot fixes

http://ftp.sas.com/techsup/download/hotfix/apcore_home.html

If you are running SAS Text Miner 3.2, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/tmine_home.html

5. Start the SAS Analytics Platform server.

Note: By default the SAS Analytics Platform is not installed as a Windows Service. Likewise, on UNIX, this process does not run as a background process by default. This means that once you close the terminal session that was used to start the server, the server will not continue to run. For information on how to install this as a Windows service or run on UNIX as a background process, refer to the Administrator's Guide for SAS Analytics Platform at the following Web address:

<http://support.sas.com/documentation/onlinedoc/apcore>.

On Windows Platforms, you can start the server by selecting

Start → Programs → SAS → SAS Analytics Platform → Start AP Server

On UNIX platforms, you should start the server by running the `apserver` script, which is typically located at `<installdir>/SASAPCore/bin`. You can run the script in one of the following ways:

`./apserver start`

or

`nohup ./apserver -headless start > <installdir>/SASAPCore/logs/ap.log 2>&1 &`

Note: This command will start the **apserver** process as a background task so that you can exit your `xterm` session and leave the server running. It will also generate a log file instead of sending the output to `stdout`. For more information, please refer to "Installing and Running the SAS Analytics Platform as a UNIX Background Service" in the Administrator's Guide for SAS Analytics Platform at the following Web address:

<http://support.sas.com/documentation/onlinedoc/apcore>

6. * Optional - To customize your SAS Workspace Server for use by SAS Enterprise Miner, refer to the "Customizing SAS Enterprise Miner Metadata by Using the Enterprise Miner Plug-in for SAS Management Console" section in the "Administering SAS Enterprise Miner" chapter in the *SAS 9.1.3 Intelligence Platform: Desktop Application Administration Guide* at

<http://support.sas.com/documentation/configuration/bidaag.pdf> for more information. You can go directly to this information in the SAS OnlineDoc version of this document here:

<http://support.sas.com/onlinedoc/913/getDoc/en/bidaag.hlp/a002760408.htm>.

Note: If you make any modifications to the workspace server settings, the SAS Analytics Platform must be stopped and restarted in order to pick up the changes.

On the Client

If You are Deploying Using Java Web Start

1. Install Sun's 1.4.2 JRE from the Sun Web site. The download link for Sun's archive of 1.4.2_09 is
http://java.sun.com/products/archive/j2se/1.4.2_09/index.html.
Select the **Download J2RE** link.
2. Launch the SAS Enterprise Miner 5.3 Java Web Start Client by pointing your Web browser to the SAS Analytics Platform server, using the port number of the embedded HTTP server. By default, this port is 6098. Therefore, if your SAS Analytics Platform Server is running on a machine called **my.apserver** then you would enter the following URL: `http://my.apserver:6098`.

You should then see the SAS Analytics Platform status page. Click the **Configuration** tab and then select the **Launch** link provided for SAS Enterprise Miner.

3. Enter the appropriate **User Name** and **password** when prompted.
4. Install the SAS Enterprise Miner Tree Desktop Application if you have not previously done so and you want the capability to perform interactive training of decision trees within SAS Enterprise Miner. This application is a separate application and is not installed via the SAS Enterprise Miner files downloaded with Java Web Start. You can install this application from the **Client Side Components CD, Volume 1** (CLIENT1CD in your SAS Software Depot) or you can download the application from the following Web site:

<http://www.sas.com/apps/demosdownloads/setupcat.jsp;jsessionid=6F246D6E6A988B749F080F15599DF96E.tomcat2?cat=Enterprise+Miner>

Make sure to run the System Requirements Wizard prior to installing this application.

If You are NOT Deploying Using Java Web Start

1. Ensure that a planned install of the client tier was completed on your machine.
2. If you also have SAS Model Manager 2.1 installed, you **MUST** install the latest SAS Model Manager Hotfix, 21MODELGR02, available at
<http://ftp.sas.com/techsup/download/hotfix/modelmgr21.html>.
3. Launch the SAS Enterprise Miner 5.3 client.
Start → Programs → SAS → SAS Enterprise Miner 5.3 → Enterprise Miner
4. In the **Log On** window, de-select **Personal Workstation**, and enter your user ID, password and the host of the SAS Analytics Platform server. You can locate available SAS Analytics Platform servers by selecting the **Search for Servers** item from the drop down list provided.

Depending on your network configuration, you may not have a server value returned. If not, enter the machine name on which the SAS Analytics Platform is running following by a colon (:) and the appropriate port number, which is typically 5099.

For example: `myapserver.machine:5099`

If the machine name doesn't work, try replacing the machine name with the IP address.

For example: `10.40.12.43:5099`

5. Click **Log On**.

Upgrading from SAS Enterprise Miner 5.2 to SAS Enterprise Miner 5.3

This section describes upgrading from SAS Enterprise Miner 5.2 to SAS Enterprise Miner 5.3 for the following configurations:

- Personal Workstation (Windows)
- Two-Machine Deployment
 - Server Tier
 - Client Tier

Upgrade Instructions for Personal Workstation

Checklist for Personal Workstation Upgrade Tasks
Create a backup copy of your SAS metadata
Stop the servers: SAS Object Spawner and SAS Metadata Server
Remove SAS Enterprise Miner 5.2 Java client, SAS Enterprise Miner Tree Desktop Application, and SAS Enterprise Guide
Delete the sas.swing.remote.jar file
Install SAS Enterprise Miner 5.3 and related software
Apply required hotfixes
Restart Servers
Merge Smart Object
Configure SAS Analytics Platform

Note: The path names in this document are based on the sample SAS Enterprise Miner plan. If this plan is used during the installation, the default configuration directory is named 'EMiner'; if not, the configuration directory will be different and should be substituted for 'EMiner' in the path.

1. Create a Backup Copy of Your SAS Metadata. For backup instructions, see the chapter "Using the %OMABAKUP Macro to Perform Backups and Restores" in the *SAS 9.1.3 Intelligence Platform System Administration Guide* available at

<http://support.sas.com/documentation/configuration/bisag.pdf>

Here is the link to the online version of this document:

<http://support.sas.com/onlinedoc/913/getDoc/en/bisag.hlp/a003134682.htm>

If you previously installed using the Enterprise Miner, one machine sample plan and accepted the defaults, the code to run the backup would look similar to this:

```
options metaserver='localhost'
      metaport=8561
      metaprotocol=bridge
      metauser='<domain\userid>'
```

```
metapass='<password>'
metarepository='Foundation';

%omabakup(destinationpath="c:\sas\eminer\lev1\sasbackup",
serverstartpath="c:\sas\eminer\lev1\sasmain",
rposmgrpath="metadataserver\rposmgr");
run;
```

Note: You must create the folder specified for the **destinationpath** prior to running the code.

Note: As an alternative to running the OMABAKUP utility, you could stop the services by following the instructions in Step 2 and then make a copy of the configuration directory, C:\SAS\EMiner.

2. Stop the servers.

Start → Programs → SAS → EMiner → Stop Object Spawner

Start → Programs → SAS → EMiner → Stop Metadata Server

3. Remove the SAS Enterprise Miner 5.2 client, SAS Enterprise Miner Tree Desktop Application, and SAS Enterprise Guide. Only remove the SAS components that are listed. Other SAS components will remain installed but will be updated during the installation process.

Note: If SAS Text Miner 3.1 is currently installed, remove that software as well.

To remove this software, select

Start → Settings → Control Panel → Add or Remove Programs.

Make the following selections from the list of software to remove:

- SAS Enterprise Miner Java Client 5.2 (depending on your license this may also be listed as SAS Enterprise Miner Desktop or SAS Data Mining for the Classroom)
- SAS Enterprise Miner Tree Desktop Application
- SAS Text Miner Java Client 3.1 (if licensed)
- **SAS Enterprise Guide**

Note: The upgrade plan includes SAS Enterprise Guide by default. If you have the latest version of SAS Enterprise Guide (4.1) installed with the appropriate hotfixes, you do **NOT** need to uninstall and reinstall. If you choose not to reinstall SAS Enterprise Guide, you will need to deselect **SAS Enterprise Guide** from the list of products when it is presented in the SAS Software Navigator. If you decide you need to install the latest version of SAS Enterprise Guide, you should first uninstall the current version when you are uninstalling the other recommended products and it will be installed automatically during the installation process.

Note: Accept the defaults when prompted by the InstallShield Wizard during removal of the software.

4. Delete the sas.swing.remote.jar file from the /SASAPCore/lib directory. This is the only file that should be deleted from this location.

Windows:

Using Windows Explorer, navigate to the SASAPCore/lib folder. The default location is: C:\Program Files\SAS\SASAPCore\lib

Right-click on `sas.swing.remote.jar` and choose **Delete**.

UNIX:

Navigate to the `SASAPCore/lib` directory. For example:

```
cd <installdir>/SASAPCore/lib
```

Remove the `sas.swing.remote.jar` file:

```
rm sas.swing.remote.jar
```

5. Install SAS Enterprise Miner and related software.
 - a. Insert the **SAS Software Navigator** CD.
 - b. Select **Personal** as the type of deployment.
 - c. Specify the location of your SID file when prompted.
 - d. Select **Standard plan** and choose the plan named **Enterprise Miner upgrade, one machine**.

Note: If your license also includes SAS Text Miner, select the **Enterprise Miner and Text Miner upgrade, one machine** plan.
 - e. Continue to follow the prompts from the SAS Software Navigator, including the System Requirements Wizard and the InstallShield Wizard. Read each screen carefully and provide the necessary information.
 - f. The SAS Software Navigator will progress through the list of products to be installed. Several of the products have silent installs, meaning they do not require any user input. Other product installations may prompt for user input, to which you may accept the default values.

Note: SAS Foundation is included in the plan. There are SAS Foundation components that need to be updated for SAS Enterprise Miner 5.3 to work correctly. **On Windows**, the installer will detect that SAS is already installed and present the choices to **Add Components to SAS** or **Install a new instance of SAS**. Take the default, **Add Components to SAS**. On the **Select Components** screen, all products licensed are selected; accept this default by clicking **NEXT** to ensure that all components are correctly updated.

6. Once the installation has completed, you must install the following system hot fixes in order for the system to function properly:

Note: All currently active SAS sessions, daemons, spawners and servers must be terminated before applying hotfixes.

E9BB61

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB61

This fix for the SASMSG function is required by SAS Enterprise Miner 5.3. Apply this fix to the SAS Server image.

E9BB91

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB91

This fix will resolve a ClassFormatError exception found when executing the SAS Enterprise Miner score code where coded characters contain umlauts. Apply this fix to the SAS Server image.

E9BC09 (for AIX)

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC09

This fix resolves performance problems and errors found when running very large SAS DATA STEP programs such as those generated by the Interactive-Grouping node in SAS Enterprise Miner. Apply this fix to the SAS server image.

E9BC17

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC17

This fix will resolve a problem where the SAS Enterprise Miner Java client hangs at the SAS Enterprise Miner splash screen after submitting log on to SAS Analytics Platform.

Apply the latest SAS Enterprise Miner 5.3 hot fixes

http://ftp.sas.com/techsup/download/hotfix/em_home.html

Apply the latest SAS Enterprise Guide 4.1 hot fixes

http://ftp.sas.com/techsup/download/hotfix/ent_guide41.html

Apply the latest SAS Analytics Platform 1.4 hot fixes

http://ftp.sas.com/techsup/download/hotfix/apcore_home.html

If you are running SAS Text Miner 3.2, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/tmine_home.html

If you are running SAS Credit Scoring for Enterprise Miner 5.3, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/credscem_home.html

SAS Note SN-014569

<http://support.sas.com/kb/14/569.html>

This SAS Note details the platform-specific directions of modifying the SAS configuration file to add an environment variable for creating Java scoring code from SAS Enterprise Miner.

7. Restart the Servers.

Start → Programs → SAS → EMiner → Start Metadata Server

Start → Programs → SAS → EMiner → Start Object Spawner

8. Merging the SAS Enterprise Miner Smart Object is necessary in order for users to register SAS Enterprise Miner models to the SAS Metadata Server for integration with other applications.

In order to perform the merge, you'll need to know the installation location of the SAS Enterprise Miner `smartobject.xml` file. The default location is:

C:\Program Files\SAS\SASAPCore\apps\EnterpriseMiner\conf

- a. If the SAS Management Console is not open, start it by selecting

Start → Programs → SAS → SAS Management Console 9.1.

Log in.

- b. Expand the following folders: **Environment Management → Foundation Services Manager → Analytics Platform - Foundation Services → Core Services**

Note: *If SAS Management Console was open prior to starting SAS Enterprise Miner, you may need to right-click on **Foundation Service** and select **Refresh** for the Analytics Platform service to appear.*

- c. Right-click on **Information Service** and select **Merge Service Configuration**.
- d. Navigate to the location noted above, select the `smartobject.xml` file, and then click **Open** to merge.

When this step is finished, the SAS Enterprise Miner Smart Object merge will be complete.

9. Configure the Analytics Platform Server

Start → Programs → SAS → Analytics Platform → AP Server Advanced Configuration

Specify the metadata server host name and port. The typical personal workstation deployment uses host= 127.0.0.1 and the default port= 8561. Specify the user ID and password used to logon to your machine. Don't forget to include the domain prior to the user ID for the Logon; for example, domain\userid.

Typically these are the credentials used when logging onto your Windows machine but if you are unsure, look at the value stored in the **adminusers.txt** file typically located at:

c:\SAS\EMiner\Levl\SASMain\MetadataServer

More information on the SAS Analytics Platform server can be found at:
<http://support.sas.com/documentation/onlinedoc/apcore>

10. Launch SAS Enterprise Miner 5.3:

Start → Programs → SAS → SAS Enterprise Miner 5.3 → Enterprise Miner

In the **Log On** window, select **Personal Workstation**, enter your **userid** (including the domain) and **password** and then click **Log On**.

Refer to the SAS Enterprise Miner on-line help for more information on further customizing your SAS Enterprise Miner Environment.

Upgrade Instructions for a Two-Machine Deployment

Note: If your deployment scenario is neither a personal workstation nor a two-machine deployment, contact your SAS Representative for assistance with a custom plan.

Server Tier

Checklist for the Server Tier Upgrade Tasks	
	Create a backup copy of your SAS metadata
	Stop the servers: SAS Analytics Platform, SAS Object Spawner and SAS Metadata Server
	Remove old hotfixes (UNIX only)
	Backup pertinent configuration files
	Remove SAS Enterprise Miner 5.2 Java client components from the machine running SAS Analytics Platform
	Delete the sas.swing.remote.jar file
	Install SAS Enterprise Miner 5.3 and related software
	Apply required hot fixes
	Merge Smart Object
	Restart Servers
	Configure SAS Analytics Platform

Note: The path names in this document are based on the sample SAS Enterprise Miner plan. If this plan is used during the installation, the default configuration directory is named 'EMiner'; if not, the configuration directory will be different and should be substituted for 'EMiner' in the path.

1. Create a Backup Copy of your SAS Metadata.

For information about how to create a copy of your entire metadata repository, see the section about managing the SAS Metadata Server in the *SAS Intelligence Platform: Administration Guide* that can be found in:

<http://support.sas.com/documentation/configuration/bisag.pdf>

Here is the link to the on-line version of this document:

<http://support.sas.com/onlinedoc/913/getDoc/en/bisag.hlp/a003134682.htm>

2. Stop the SAS Analytics Platform, SAS Metadata Server, and SAS Object Spawner.

SAS Analytics Platform

To stop the SAS Analytics Platform, perform the following steps:

On UNIX systems:

- a. Open a terminal session and have an X server running on the machine where the SAS Analytics Platform is running.
- b. Navigate to the !SASROOT/SASAPCore/bin path.
- c. Execute the following command: **./apserver stop**

On Windows systems:

From the Start menu, select

Programs → SAS → SAS Analytics Platform → Stop AP Server

SAS Object Spawner

To stop the SAS Object Spawner, perform the following steps:

On UNIX systems:

- a. Navigate to the following path:
`<path-to-config-dir>/Lev1/SASMain/ObjectSpawner`
- b. Execute the script in the directory that stops the SAS Object Spawner.
`./ObjectSpawner.sh stop`

On Windows systems:

From the Start menu, select **Programs → SAS → EMiner → Stop SAS Object Spawner**

SAS Metadata Server

To stop the SAS Metadata Server, perform the following steps:

On UNIX systems:

- a. Navigate to the following path:
`<path-to-config-dir>/Lev1/SASMain/MetadataServer`
- b. Execute the script in the directory that stops the SAS Metadata Server.
`./MetadataServer.sh stop`

On Windows systems:

From the Start menu, select **Programs → SAS → EMiner → Stop SAS Metadata Server.**

3. **IMPORTANT – for UNIX users only.** If you have not already done so, **before proceeding**, follow the instructions to remove old hot fixes which are included on the sheet in your installation kit entitled “IMPORTANT INFORMATION – PLEASE READ.” If this sheet is not available, please go to <http://ftp.sas.com/techsup/download/hotfix/uinst913.html> to download the required script.

4. Backup pertinent configuration files and scripts.

During the installation, the SAS Analytic Platform components will be upgraded to SAS Analytics Platform 1.4. Files within the SASAPCore directory will be updated. If you have made manual changes to files within that directory, make copies of those files and store them in an alternate location so that you have a record of those changes in case you would like to mimic those changes within the new files.

The file changed most often is the `apserver.sh` on UNIX platforms. This file resides in `<path-to-installdir>/SASAPCore/bin`.

The following is a list of other files that you may have modified:

- `apserver.bat` – (Windows only) in `<path-to-installdir>/SASAPCore/bin`
- `<path-to-installdir>/SASAPCore/conf`
 - `login.conf`
 - `server.config`
 - `wrapper.conf` - Windows only
- `<path-to-installdir>/SASAPCore/EnterpriseMiner`
 - `app.config`
 - `em.sh` – UNIX only
 - `em.bat` – Windows only

5. On the machine running the SAS Analytics Platform, remove the SAS Enterprise Miner 5.2 Java client components.

Note: If SAS Text Miner 3.1 is currently installed, remove that software as well.

On Windows systems:

To remove this software, select **Start → Settings → Control Panel → Add or Remove Programs**.

Make the following selections from the list of software to remove:

- SAS Enterprise Miner Java Client 5.2
- SAS Text Miner Java Client 3.1 (if licensed)

On UNIX systems:

Execute **UninstEM** from

`<path-to-installdir>/SASAPCore/apps/EnterpriseMiner/_uninstEM`

Note: If SAS Text Miner 3.1 is currently installed, remove that software as well by running **UninstTMC** from the same location.

Note: Accept the defaults when prompted by the InstallShield Wizard during removal of the software.

6. Delete the `sas.swing.remote.jar` file from the `/SASAPCore/lib` directory. This is the only file that should be deleted from this location.

Windows:

Using Windows Explorer, navigate to the `SASAPCore/lib` folder. The default location is: `C:\Program Files\SAS\SASAPCore\lib`

Right-click on `sas.swing.remote.jar` and choose **Delete**.

UNIX:

Navigate to the `SASAPCore/lib` directory. For example:

```
cd <installdir>/SASAPCore/lib
```

Remove the `sas.swing.remote.jar` file:

```
rm sas.swing.remote.jar
```

7. Install SAS Enterprise Miner 5.3 and related software.

To install the new version of SAS Enterprise Miner software, a planned install is required since several components need to be updated.

Note: *It is recommended that you build a SAS Software Depot with this new media and perform the install using the SAS Software Depot. For more information on this topic, review the chapter 'Building a SAS Software Depot' in the SAS 9.1.3 Intelligence Platform Installation Guide available at <http://support.sas.com/documentation/configuration/biig.pdf>.*

- a. If your site has created a SAS Software Depot, then start the SAS Software Navigator by launching the `setup.exe` (Windows) or `setup.sh` (UNIX) from the SAS Software Depot; otherwise, begin the install by launching the **SAS Software Navigator CD**.
- b. Select the **Advanced** deployment option and the path to your SID file, and then click **Next**.
- c. Verify the information contained in your SID file and then click **Next**.
- d. Select a standard deployment plan and select **Enterprise Miner upgrade, two machines**, or browse to the location of your customized plan. Click **Next**. Select the **ServerTier** when prompted to select your installation options.

Note: *If your license also includes SAS Text Miner, select the **Enterprise Miner and Text Miner upgrade, two machines** plan. Select this plan even if you are upgrading SAS Enterprise Miner but adding SAS Text Miner at this time.*

- e. Continue to follow the prompts from the SAS Software Navigator, including the System Requirements Wizard and the InstallShield Wizard. Read each screen carefully and provide the necessary information.
- f. The SAS Software Navigator will progress through the list of products to be installed. Several of the products have silent installs, meaning they do not require any user input. Others product installations may prompt for user input, to which you may accept the default values.

Note: *SAS Foundation is included in the plan. There are SAS Foundation components that need to be updated for SAS Enterprise Miner 5.3 to work correctly. On Windows, the installer will detect that SAS is already installed and present the choices **Add Components to SAS** or **Install a new instance of SAS**. Take the default **Add Components to SAS**. On the **Select Components** screen, all products licensed are selected; accept this default by clicking **NEXT** to ensure that all components are correctly updated.*

On UNIX, choose the option to **Update an Existing Installation** and accept the prompt to **Load All New Licensed Software (Recommended)**.

8. Once the installation has completed, you must install the following system hot fixes in order for the system to function properly:

Note: *All currently active SAS sessions, daemons, spawners and servers must be terminated before applying hotfixes.*

E9BB61

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB61

This fix for the SASMSG function is required by SAS Enterprise Miner 5.3. Apply this fix to the SAS Server image.

E9BB91

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BB91

This fix will resolve a ClassFormatError exception found when executing the SAS Enterprise Miner score code where coded characters contain umlauts. Apply this fix to the SAS Server image.

E9BC09 (for AIX)

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC09

This fix resolves performance problems and errors found when running very large SAS DATA STEP programs such as those generated by the Interactive-Grouping node in SAS Enterprise Miner. Apply this fix to the SAS server image.

E9BC17

http://ftp.sas.com/techsup/download/hotfix/e9_sbcs_prod_list.html#E9BC17

This fix will resolve a problem where the SAS Enterprise Miner Java client hangs at the SAS Enterprise Miner splash screen after submitting log on to SAS Analytics Platform.

Apply the latest SAS Enterprise Miner 5.3 hot fixes

http://ftp.sas.com/techsup/download/hotfix/em_home.html

Apply the latest SAS Enterprise Guide 4.1 hot fixes

http://ftp.sas.com/techsup/download/hotfix/ent_guide41.html

Apply the latest SAS Analytics Platform 1.4 hot fixes

http://ftp.sas.com/techsup/download/hotfix/apcore_home.html

If you are running SAS Text Miner 3.2, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/tmine_home.html

If you are running SAS Credit Scoring for Enterprise Miner 5.3, apply the latest hot fixes

http://ftp.sas.com/techsup/download/hotfix/credscem_home.html

SAS Note SN-014569

<http://support.sas.com/kb/14/569.html>

This SAS Note details the platform-specific directions of modifying the SAS configuration file to add an environment variable for creating Java scoring code from SAS Enterprise Miner.

9. Merging the SAS Enterprise Miner Smart Object is necessary in order for users to register SAS Enterprise Miner models to the SAS Metadata Server for integration with other applications.

In order to perform the merge, you'll need to know the installation location of the SAS Enterprise Miner smartobject.xml file. The default location is:

Windows: C:\Program Files\SAS\SASAPCore\apps\EnterpriseMiner\conf

UNIX: <installdir>/SASAPCore/apps/EnterpriseMiner/conf

- a. Start the SAS Management Console.
- b. Expand the following folders:
 - Environment Management
 - Foundation Services Manager
 - Analytics Platform
 - Foundation Services
 - Core Services
- c. Right-click on **Information Service** and select **Merge Service Configuration**.
- d. Navigate to the location noted above, select the file `smartobject.xml`, and then click **Open** to merge.

When this step is finished, the SAS Enterprise Miner Smart Object merge will be complete.

10. Start the SAS Metadata Server and the SAS Object Spawner.

On Windows systems:

Start → Programs → SAS → EMiner → Start Metadata Server

Start → Programs → SAS → EMiner → Start Object Spawner

On UNIX systems, to start the Metadata Server:

- a. Navigate to the following path:
<path-to-config-dir>/Lev1/SASMain/MetadataServer
- b. Execute the script in the directory that starts the SAS Metadata Server.
./MetadataServer.sh start

On UNIX systems, to start the Object Spawner:

- a. Navigate to the following path:
<path-to-config-dir>/Lev1/SASMain/ObjectSpawner
- b. Execute the script in the directory that starts the SAS Metadata Server.
./ObjectSpawner.sh start

11. Configure the SAS Analytics Platform.

On Windows platforms you can configure the server by selecting

Start → Programs → SAS → SAS Analytics Platform → AP Server Advanced Configuration

On UNIX platforms you should run the **apserver** script in an XWindow session as follows: **./apserver config**

Use the **sasadm** user account when prompted and be sure to check the box **Remember password** in order to store your credentials. If you do not store your credentials, then you cannot run the SAS Analytics Platform as a service or background process. Accept all the default values and settings.

For more information about the SAS Analytics Platform, see the *Administrator's Guide for SAS Analytics Platform* at the following Web address:

<http://support.sas.com/documentation/onlinedoc/apcore>

Note: On UNIX, the **apserver** script is typically found in the following location:

<installdir>/SASAPCore/bin

12. Start the SAS Analytics Platform.

On Windows Platforms you can start the server by selecting

Start → Programs → SAS → SAS Analytics Platform → Start AP Server.

On UNIX platforms you should start the server by running the **apserver** script, which is typically located at <installdir>/SASAPCore/bin. You can run the script in one of the following ways:

./apserver start

or

nohup ./apserver –headless start > <SASAPCORE-INSTALL>/logs/ap.log 2>&1 &

Note: If you previously made modifications to this script, you will need to manually edit this file and make those changes again. For information on how run on UNIX as a background process, refer to the Administrator's Guide for SAS Analytics Platform at the following Web address:

<http://support.sas.com/documentation/onlinedoc/apcore>.

Client Tier

	Checklist for the Client Tier Upgrade Tasks
	Remove SAS Enterprise Miner 5.2 Java client, SAS Enterprise Miner Tree Desktop Application, and SAS Enterprise Guide from the client machines.
	Install SAS Enterprise Miner 5.3 and related software.

1. Remove SAS Enterprise Miner 5.2 and related software by selecting **Start → Settings → Control Panel → Add or Remove Programs**.

Make the following selections from the list of software to remove:

- SAS Enterprise Miner Java Client 5.2
- SAS Enterprise Miner Tree Desktop Application
- SAS Text Miner Java Client 3.1 (if licensed)
- **SAS Enterprise Guide**

Note: The upgrade plan includes SAS Enterprise Guide by default. If you have the latest version of SAS Enterprise Guide (4.1) installed with the appropriate hotfixes, you do **NOT** need to uninstall and reinstall. If you choose not to reinstall SAS Enterprise Guide, you will need to deselect **SAS Enterprise Guide** from the list of products when it is presented in the SAS Software Navigator. If you decide you need to install the latest version of SAS Enterprise Guide, you should first uninstall the current version when you are uninstalling the other recommended products and it will be installed automatically during the installation process.

Note: Accept the defaults when prompted by the InstallShield Wizard during removal of the software.

Note: If client files are deployed via Java Web Start, it is still necessary to remove the SAS Enterprise Miner Tree Desktop Application in order to install the new version as the SAS Enterprise Miner Tree Desktop Application is not deployed via Java Web Start.

2. Install SAS Enterprise Miner 5.3 and related software.

If you are deploying using Java Web Start:

- a. SAS Enterprise Miner 5.3 client files will automatically be downloaded when you launch SAS Enterprise Miner via Java Web Start.

Install the SAS Enterprise Miner Tree Desktop Application in order to perform interactive training of decision trees within SAS Enterprise Miner. As noted previously, this application is a separate application and is not installed via the SAS Enterprise Miner files downloaded with Java Web Start. You can install this application from the **Client Side Components CD, Volume 1** (CLIENT1CD in your SAS Installation Depot) or you can download the application from the following web site:

[http://www.sas.com/apps/demosdownloads/setupcat.jsp;jsessionid=6F246D6E6A988B749F080F15599DF96E.tomcat2?cat=Enterprise+Miner.](http://www.sas.com/apps/demosdownloads/setupcat.jsp;jsessionid=6F246D6E6A988B749F080F15599DF96E.tomcat2?cat=Enterprise+Miner)

Make sure to run the System Requirements Wizard prior to installing this application.

If you are NOT deploying using Java Web Start:

- a. If your site has created a SAS Software Depot, then start the SAS Software Navigator by launching the **setup.exe** (Windows) or **setup.sh** (UNIX) from the SAS Software Depot; otherwise begin the install by launching the **SAS Software Navigator CD**.
- b. Select the **Advanced** deployment option and the path to your SID file. Click **Next**.
- c. Verify that the information in the SID file is correct, and then click **Next**.
- d. Select a standard deployment plan and select **Enterprise Miner upgrade, two machines** or browse to the location of your customized plan. Click **Next**. Select the **ClientTier** when prompted to select installation options.

Note: *If your license also includes SAS Text Miner, select the **Enterprise Miner and Text Miner upgrade, two machines** plan. Select this plan even if you are upgrading SAS Enterprise Miner but adding SAS Text Miner at this time.*

- e. Continue to follow the prompts from the SAS Software Navigator, including the System Requirements Wizard and the InstallShield Wizard. Read each screen carefully and provide the necessary information.
- f. The SAS Software Navigator will progress through the list of products to be installed. Several of the products have silent installs, meaning they do not require any user input. Other product installations may prompt for user input, to which you may accept the default values.
- g. If you also have SAS Model Manager 2.1 installed, you **MUST** install the latest SAS Model Manager Hotfix, 21MODELGR02, available at <http://ftp.sas.com/techsup/download/hotfix/modelmgr21.html>.

3. Launch SAS Enterprise Miner 5.3:

Deploying via Java Web Start:

Using an existing SAS Enterprise Miner 5.2 Java Web Start icon on your desktop, select that icon which will download the new SAS Enterprise Miner 5.3 client files. Otherwise, launch the SAS Enterprise Miner Java Web Start Client by pointing your Web browser to the SAS Analytics Platform server, using the port number of the embedded HTTP server. By default, this port is 6098. Therefore, if your SAS Analytics Platform Server is running on a machine called **my.apserver**, then you would enter the URL
`http://my.apserver:6098.`

You should then see the **SAS Analytics Platform status** page. Click the **Configuration** tab and then select the **Launch** link provided for SAS Enterprise Miner 5.3.

Launching via local client install:

Start → Programs → SAS → SAS Enterprise Miner 5.3 → Enterprise Miner

In the **Log On** window, de-select **Personal Workstation**; enter your **user ID** and **password**, and the **host** of the SAS Analytics Platform server. You can locate available SAS Analytics Platform servers by selecting the **Search for Servers** item from the drop down list provided.

Depending on your network configuration, you may not have a server value returned. If not, enter the machine name on which the SAS Analytics Platform is running following by a colon (:) and the appropriate port number, which is typically 5099.

For example: `myapserver.machine:5099`

If the machine name doesn't work, try replacing the machine name with the IP address.

For example: `10.40.12.43:5099`

Click **Log On**.



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