

## SAS® IT Resource Management 2.7 and 3.1.1

This Road Map briefly describes the media contained in your SAS IT Resource Management package and how to proceed to install the software.

### Description of Your Packages

Your SAS IT Resource Management software comes in as many as three installation kits. Each kit represents a distinct functional area of your SAS IT Resource Management solution and should be installed on a separate machine:

- SAS IT Resource Management Server
- SAS IT Resource Management Client 2.7
- SAS Metadata Server

Please note that your SAS IT Resource Management Server installation kit contains the software necessary to install SAS IT Resource Management Server 2.7 and SAS IT Resource Management Server and Client 3.1.1. The SAS IT Resource Management Client 2.7 installation kit will only be required if you are deploying SAS IT Resource Management 2.7.

SAS IT Resource Management 2.7 and SAS IT Resource Management 3.1.1 are both current releases of this SAS solution. SAS IT Resource Management 2.7 runs on the SAS 9.1.3 architecture and is the pre-requisite release required by SAS IT Service Level Management and SAS IT Charge Management. SAS IT Resource Management 3.1.1 runs on and fully leverages the SAS 9.1.3 architecture to create an IT data mart.

Follow the steps below based on which version of SAS IT Resource Management you are installing.

### SAS IT Resource Management 2.7

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 IT Resource Management Server.***

- ❑ To identify the installation kit that contains SAS IT Resource Management Server, see the product listing on the SAS 9.1.3 label on each kit.
- ❑ Read and complete all of the steps in the *QuickStart Guide to Your SAS 9.1.3 Basic Installation* in order to install SAS IT Resource Management Server. The *QuickStart Guide* is available on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Basic Installation Edition Kit**, then select your operating system's *QuickStart Guide* in the "QuickStart Guide" section.
- ❑ Refer to the "Installing SAS IT Resource Management" chapter or appendix of the *SAS Configuration (or Post-Installation) Guides – SAS 9.1.3 Foundation* for information on the manual configuration steps required to complete your installation. The document may be

located on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Basic Installation Edition Kit**, then select your operating system's post-installation document in the "Configuration" section under "Post-Installation and Configuration Guides."

**Note:** *If this installation is on the z/OS platform, then the Merrill's Expanded Guide to CPE, MXG is included with this installation. Instructions for its installation are included with the information for SAS IT Resource Management.*

**Note:** *If this is a new SAS IT Resource Management installation (rather than an upgrade) on a Windows system, then the NTSMF product CD is included with this installation. The NTSMF product CD is for Windows 32-bit systems. If you are planning to install Demand Technology's NTSMF product on Windows 64-bit systems, you will need to contact Demand Technology (at <http://www.demandtech.com/>) and request access to a download site that is available from this manufacturer.*

## **Step 2: Install and configure the installation kit containing SAS IT Resource Management Client 2.7.**

**Note:** *If SAS IT Resource Management Client 2.7 was included in the SAS IT Resource Management Server installation kit, then this installation should be complete. Otherwise, continue with this step.*

- ❑ To identify the installation kit that contains SAS IT Resource Management Client 2.7, 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 Resource Management Client 2.7 kit.
- ❑ When those steps have been performed, refer to the "Installing SAS IT Resource Management" chapter or appendix of the *SAS Configuration (or Post-Installation) Guides – SAS 9.1.3 Foundation* for information on the manual configuration steps required to complete your installation. The document is available on the **Documentation for Installing and Configuring SAS** CD. The document may be located on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Basic Installation Edition Kit**, then select your operating system's post-installation document in the "Configuration" section under "Post-Installation and Configuration Guides."

## **SAS IT Resource Management 3.1.1**

If you are a new SAS IT Resource Management 3 customer, then you should follow these directions beginning with Step 1 below. If you are an existing SAS IT Resource Management 3.1 customer and your intention is to update your existing installation to SAS IT Resource Management 3.1.1, then you should follow the directions in the SAS IT Resource Management 3.1.1 Update Install document.

The SAS IT Resource Management 3.1.1 Update Install document is available on the media for the SAS IT Management Solutions Core Components Data Tier product via the SAS Software Navigator's Software Index-style install. The SAS IT Resource Management 3.1.1 Update Install information is also available in the "Installing SAS IT Resource Management" chapter or appendix of the *SAS Configuration (or Post-Installation) – SAS 9.1.3 Foundation Guides* available on the **Documentation for Installing and Configuring SAS** or Install Center. On the first page, select **Planning Installation Edition Kit**, then select your operating system's post-installation document in the "Configuration" section under "Post-Installation and Configuration Guides."

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.

**Note:** If the kit that contains SAS Metadata Server also contains SAS IT Resource Management Server, skip to step 2. Otherwise, continue with this step.

- ❑ 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 IT Resource Management Server.

- ❑ To identify the installation kit that contains SAS IT Resource Management 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 IT Resource Management 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 IT Resource Management Server.

**Note:** For z/OS installations, Action A must be used to install SAS IT Resource Management Server 3.1.1.

- ❑ Perform the configuration steps included in the `instructions.html` file that is created either by the SAS Configuration Wizard or, on z/OS, the I9COPYIA job. When performing the step to “Define your Metadata Repository,” you should deselect the checkbox indicating that “This repository will be under change management.” In the context of SAS IT Resource Management, a Foundation repository with Change Management enabled is NOT supported. Please note that the installation kit with SAS IT Resource Management Client 2.7 on its label contains no software that is required for SAS IT Resource Management 3.1.1 (it is only required for SAS IT Resource Management 2.7) and may be set aside.
- ❑ Refer to the “Installing SAS IT Resource Management” chapter or appendix of the *SAS Configuration (or Post-Installation) – SAS 9.1.3 Foundation Guides* for information on the manual configuration steps required to complete your installation. The document can be located on the **Documentation for Installing and Configuring SAS** CD or Install Center. On the first page, select **Planning Installation Edition Kit**, then select your operating system’s post-installation document in the “Configuration” section under “Post-Installation and Configuration Guides.”

**Note:** *If this installation is on the z/OS platform, then the Merrill's Expanded Guide to CPE, MXG is included with this installation. Instructions for its installation are included with the information for SAS IT Resource Management.*

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