

Installation Instructions for Hot Fix I92003

UNIX

Hot fix **I92003** addresses the issue(s) in *SAS Credit Scoring for Banking 5.1* as documented in the *Issue(s) Addressed* section of the hot fix download

page: <http://ftp.sas.com/techsup/download/hotfix/HF2/I92.html#I92003>

I92003 is a "container" hot fix that contains the following "member" hot fixes which will update the software components as indicated.

I76003 updates **SAS Credit Scoring for Banking Mid Tier 5.1**

I91002 updates **SAS Credit Scoring for Banking Server 5.1**

K94002 updates **SAS Foundation for Banking Server 5.1**

See [What is a container hot fix?](#) in the Hot Fix FAQ for more information about container hot fixes.

Before applying this hot fix, follow the instructions in [SAS Note 35968](#) to generate a SAS Deployment Registry report, then verify that the appropriate product releases are installed on your system. The release number information in the Registry report should match the 'member' release number information provided above for the software components installed on each machine in your deployment.

The hot fix downloaded, I92003pt.zip, includes the updates required for all components listed above on all applicable operating systems. To apply this hot fix on multiple machines, you can either save I92003pt.zip on each machine or save it in a network location that is accessible to all machines.

Do NOT extract the contents of I92003pt.zip. The hot fix installation process will extract the contents as needed.

IMPORTANT NOTES

1. You **must** use the `-alwaysoverwrite` command line option in order to apply this hot fix.

If you are running SAS 9.3 or 9.3M1, use the `sashf.exe` script, ie:

```
sashf.exe -alwaysoverwrite
```

If you are running SAS 9.3M2, use the `sasdm.exe` script, ie:

```
sasdm.exe -alwaysoverwrite
```

2. Before you apply the hot fix, make sure that you have performed all of the installation and post-installation steps that are described in the *SAS Credit Scoring for Banking 5.1: Administrator's Guide*.
3. The customizations done in any of the jobs, sas code, or tables that are modified as part of this hot fix will need to be reapplied manually after the hot fix is applied.
4. Files delivered in this hot fix will be backed up during the installation process. However, it is good general practice to back up your system before applying updates to software. The following should be backed-up for this hot fix, which will allow you to restore your environment to the original status prior to having applied the hot fix:
 - a. Take a backup of SAS Metadata repository.
 - b. Take a backup of application mart data files, copy the dataset and indexes from the following folder to your back area

<SASCONFIG>/<Level>/AppData/SASBankingFoundation/5.1/data/apdm

- c. Take a backup of data at the following locations:

Foundation Mart – See the topic, “Backing Up Data” in Chapter 7, “Populate the Foundation Mart” in the *SAS Credit Scoring for Banking 5.1: Administrator's Guide*.
Credit Scoring Mart – See the topic, “Backing Up Data” in Chapter 9, “Populate the Credit Scoring Mart” in the *SAS Credit Scoring for Banking 5.1: Administrator's Guide*.

- d. Take a backup of deployed jobs at the following locations:

/Applications/SASBankingFoundation5.1/deployed_jobs/foundationmart
/Applications/SASBankingFoundation5.1/deployed_jobs/inputmart
/Applications/SASCreditScoringBankingSrvr5.1/deployed_jobs/csmart

5. You must have Administrator Privileges on your CLIENT or SERVER machine.
6. All currently active SAS sessions, daemons, spawners and servers must be terminated before applying this hot fix.
7. This hot fix should be installed using the same userid who performed the initial software installation.

INSTALLATION

Hot Fix I92003 must be installed on each machine where the updated components of the product, listed above, are installed. During the installation process you may see references to all operating systems for which updates are provided in the hot fix. The installation process will determine the operating system and which component(s) of SAS Credit Scoring for Banking 5.1 require updating on the machine. See [SAS Note 44810](#) for more details.

The hot fix will be applied using the SAS Deployment Manager (SDM). By default, the SDM will search in the <SASHOME>/InstallMisc/HotFixes/New directory for hot fixes to be applied, but will also prompt for a location if you have downloaded hot fixes to a different directory.

After downloading I92003pt.zip, follow the instructions for applying hot fixes in the [SAS Deployment Wizard and SAS Deployment Manager 9.3: User's Guide](#).

The hot fix installation process generates the log file

<!SASHOME>/InstallMisc/InstallLogs/IT_date-and-time-stamp.log

for example, IT_2011-10-31-13.18.21.log. Each attempt to apply a hot fix results in the creation of a new log file giving detailed information regarding the installation process.

Postexec log files are created after the installation is completed and identifies the files that were added, backed up, changed and removed. These log files include the 'member' hot fix id in the name of the file and are also written to the <!SASHOME>/InstallMisc/InstallLogs directory. There is one postexec log for each 'member' hot fix applied (member hot fixes are listed at the top of these instructions).

The content of this hot fix is listed in the [hot fix manifest](#).

POST-INSTALLATION INSTRUCTIONS

[I76003 updates SAS Credit Scoring for Banking Mid Tier 5.1](#)

Authentication and software component updates

1. Change the authentication mechanism from Host based Authentication to Shared Account based Authentication. For detailed steps required for this configuration, refer to *SAS 9.3 Intelligence Platform: Security Administration Guide -- How to Store Passwords for the Workspace Server*, (Chapter 11, Page 144)

NOTE:

- i. This step is applicable only if the Metadata and Application tier are a pair of Windows and Unix machines or vice versa.
- ii. This needs to be done for all external accounts.
- 2. Software component updates:
 - i. Connect to SAS Management Console with administrator profile.
 - ii. Go to Plugin tab-->Application Management-->Configuration Manager-->SAS Application Infrastructure.
 - iii. Go to Properties of the Software Component 'Credit Scoring Banking Mid 5.1'
 - iv. Select 'Advanced' tab.
 - v. Update the property 'dabt.sharesrvhost' with value as share server host name.
 - vi. Add the following properties:

Re-build and Re-deploy Web Application

| Property | Value |
|------------------------|------------------------------|
| dabt.sharesrvport | Share server port number |
| dabt.workspacesrvrhost | Workspace Server host name |
| dabt.workspacesrvrport | Workspace Server port number |

This hot fix requires that the WebApp be rebuilt and redeployed. Use the following steps to perform this post-installation task:

Step 1: Re-build Web Application

In order for this step to execute correctly, the Metadata Server must be running.

1.1 Invoke the SAS Deployment Manager 9.3

From the SASDeploymentManager directory launch *sasdm.sh*.
 SAS Deployment Manager is installed in the following default location:
 <SASHOME>/SASDeploymentManager/9.3

1.2 Select a language in the *Choose Language* box

1.3 Select Rebuild Web Applications

1.4 Select Configuration Directory or Enter the Configuration Directory and Level that needs to be updated

1.5 Specify Connection Information, including the *sasadm* User ID and Password

1.6 Select *Credit Scoring Banking Mid 5.1* as the Web Application to Rebuild

1.7 Verify the information on the Summary screen and select Start

1.8 Select Finish when the deployment is complete

This process will update the *Credit Scoring for Banking 5.1* ear in
<SASCONFIGDIR>/Web/Staging.

A backup of the original ear file will be placed in the directory below:

<SASCONFIGDIR>/Web/Staging/Backup

Step 2: Re-deploy Web Applications

Re-deploy the updated EAR file listed above to the web application server that you are using based on the instructions appropriate for your web application server. See [SAS 9.3 Intelligence Platform, Middle-Tier Administration Guide](#), Chapter 7, Administering SAS Web Applications, for more details.

Restart SAS Services and Application server

Restart SAS Services and Application server to complete the hot fix deployment.

I91002 updates SAS Credit Scoring for Banking Server 5.1

1. Importing ETL job metadata
 - a. Start SAS Data Integration Studio, and connect to the appropriate metadata server.
Note: Make sure that you are connected to the correct application server.
 - b. Go to the **Folders** tab.
 - c. Right-click on the /Products/SAS Credit Scoring for Banking 5.1 metadata folder, then select **Import SAS Package**. The Import SAS Package wizard appears.
 - d. Use the Import SAS Package wizard to import the .spk file listed below. When importing the .spk file, on the first page of the Import SAS Package wizard, enter the physical location of the .spk file. Complete the tasks on the remaining pages of the Import SAS Package wizard using the default selections.

IMPORTANT NOTE:

The spk packages below are applicable if you are using SAS Detail Data Store or not.

Windows:

<SASHome>/SASFoundation/9.3/csbnva/sasmisc/Config/Deployment/Packages/csbnva_51_hf3.spk UNIX:

<SASHome>/SASFoundation/9.3/misc/csbnva/Config/Deployment/Packages/csbnva_51_hf3.spk

Special Note:

This package will overwrite below 11 existing jobs and create 3 new Table objects:

Jobs Overwritten:-

DEFAULTED_CREDIT_FACILITY_EXT
NOM_IND_APPLICANT_DIM
LOAD_MODEL_MEASURE_ACT_LGD
CORP_ACCOUNT_DIM
LGD_FACT
AM_ACTUALS_SCORE_TIME
MODEL_SCORE_TIME_LIST
FEED_FOR_CCF
FEED_FOR_LGD
FEED_FOR_MIP
FEED_FOR_PD

3 New Tables:-

CCF_UPDATETIME_LIST
LGD_UPDATETIME_LIST
PD_UPDATETIME_LIST

e. Deploy jobs.

- i. Start SAS Data Integration Studio, and connect to the appropriate metadata server.
- ii. Expand the Folders tab and select the following jobs

| No | Job Name | Path of job in Metadata |
|----|-----------------------------------|---|
| 1. | DEFAULTED_CREDIT_FA CILITY_EXT | /Products/SAS Credit Scoring for Banking 5.1/Input Mart Extensions/Jobs/Data Preparation |
| 2. | CORP_ACCOUNT_DIM | /Products/SAS Credit Scoring for Banking 5.1/Input Mart Extensions/Jobs/Dimension Base Tables |
| 3. | NOM_IND_APPLICANT_ DIM | /Products/SAS Credit Scoring for Banking 5.1/Input Mart Extensions/Jobs/Dimension Base Tables |

- iii. Right-click the jobs and then select Scheduling → Deploy
- iv. In the Deploy a job for scheduling dialog box, from the Batch Server list, select <Application Server> – SAS DATA Step Batch Server.

- v. From the Deployment Directory list, select a directory pointing to <SASCONFIG>/Applications/SASBankingFoundation5.1/deployed_jobs/inputmart
- vi. Click OK.
- vii. Do not change the default values in the Deployed Job Name field and in the Location field.
- viii. Click OK.
- ix. File exists dialogue will be shown. Choose to Overwrite the deployed job physical file.
- x. After the jobs are deployed successfully, ensure that the deployed job files are created in the deployment directory <SASCONFIG>/Applications/SASBankingFoundation5.1/deployed_jobs/inputmart) with new timestamp of current time.

f. Select the following jobs

| No | Job Name | Path of job in Metadata |
|----|----------------------------|---|
| 1. | LGD_FACT | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact/LGD_FACT |
| 2. | LOAD_MODEL_MEASURE_ACT_LGD | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact/MODEL_MEASURE_FACT |
| 3. | AM_ACTUALS_SCORE_TIME | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact Data Prep |
| 4. | MODEL_SCORE_TIME_LIST | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact Data Prep |
| 5. | FEED_FOR_CCF | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact/MODEL_MEASURE_FACT |
| 6. | FEED_FOR_LGD | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact/MODEL_MEASURE_FACT |
| 7. | FEED_FOR_MIP | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact/MODEL_MEASURE_FACT |
| 8. | FEED_FOR_PD | /Products/SAS Credit Scoring for Banking 5.1/Credit Scoring Mart/Jobs/Scoring Data Load/Fact/MODEL_MEASURE_FACT |

- i. Right-click the jobs and then select Scheduling → Deploy
- ii. In the Deploy a job for scheduling dialog box, from the Batch Server list, select <Application Server> – SAS DATA Step Batch Server.
- iii. From the Deployment Directory list, select a directory pointing to <SASCONFIG>/Applications/SASCreditScoringBankingSrvr5.1/deploymen_jobs/csmart
- iv. Click OK.
- v. Do not change the default values in the Deployed Job Name field and in the Location field.
- vi. Click OK.
- vii. File exists dialogue will be shown. Choose to Overwrite the deployed job physical file.
- xi. After the jobs are deployed successfully, ensure that the deployed job files are created in the deployment directory <SASCONFIG>/Applications/SASCreditScoringBankingSrvr5.1/deploymen_jobs/csmart) with new timestamp of current time.

g. Apply APDM configuration and other changes

- i. Start SAS Data Integration Studio, and connect to the appropriate metadata server.

Note: Make sure that you are connected to the correct application server.

- ii. Select Tools --> Code Editor and Run the following code given below

Windows:

```
%include
"%sysget(SASROOT)\csbmva\sasmisc\controlscripts\csbmva_hf_wrapper.s as";
```

UNIX:

```
%include
"%sysget(SASROOT)/misc/csbmva/controlscripts/csbmva_hf_wrapper.sas"
;
```

- h. Check macro update.

- i. Open csbmva_setdefaults.sas file present in the following location.

Windows

<SAS Home>/SASFoundation/9.3/csbmva/ucmacros

UNIX

<SAS Home>/SASFoundation/9.3/ucmacros/ csbmva

- ii. This file should have the last two lines as :

```
/* End: Modified for Hotfix 2014: S1109569*/
```

```
%mend csbmva_setdefaults;
```


K94002 updates SAS Foundation for Banking Server 5.1

1. Importing ETL job metadata

- a. Start SAS Data Integration Studio, and connect to the appropriate metadata server.
Note: Make sure that you are connected to the correct application server.
- b. Go to the **Folders** tab.
- c. Right-click on the /Products/SAS Foundation for Banking 5.1 metadata folder, then select **Import SAS Package**. The Import SAS Package wizard appears.
- d. Use the Import SAS Package wizard to import the .spk file listed below. When importing the .spk file, on the first page of the Import SAS Package wizard, enter the physical location of the .spk file. Complete the tasks on the remaining pages of the Import SAS Package wizard using the default selections.

IMPORTANT NOTE:

If you are using SAS Detail Data Store and DDS to Foundation mart ETL, all the 9 jobs need to be imported and deployed.

If you are using only Input mart ETL and not the DDS to Foundation mart ETL, then only one job IND_ACCOUNT_DIM needs to be imported and deployed.

If you are not using both DDS to Foundation mart ETL and Input mart ETL provided along with the solution, then you need not import this spk.

Windows:

```
<SASHome>/SASFoundation/9.3/bankfdnsrv/sasmisc/config/Deployment  
/Packages/bankfdn_51_hf2.spk
```

UNIX:

```
<SASHome>/SASFoundation/9.3/misc/bankfdnsrv/config/Deployment/Pa  
ckages/bankfdn_51_hf2.spk
```

Special Note:

This package will overwrite below 9 existing jobs:

```
DE_EXT  
ACCOUNT_COUNTRY_DETAIL  
CORPORATE_CUSTOMER_QUAL_DETAIL  
FA_DE_L  
FA_CUSXFA_FPA  
FA_CUSXFA_L
```

APPLICATION_PRE_DIM
 CREDIT_FACILITY_PRE_DIM
 IND_ACCOUNT_DIM

e. Deploy jobs.

- i. Start SAS Data Integration Studio, and connect to the appropriate metadata server.
- ii. Expand the Folders tab and select the following jobs

| No | Job Name | Path of job in Metadata |
|----|--------------------------------|---|
| 1. | DE_EXT | /Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/DDS Extract For Mart Load |
| 2. | ACCOUNT_COUNTRY_DETAIL | /Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Details/ACCOUNT_COUNTRY_DETAIL |
| 3. | CORPORATE_CUSTOMER_QUAL_DETAIL | /Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Details/CORPORATE_CUSTOMER_QUAL_DETAIL |

| No | Job Name | Path of job in Metadata |
|----|--------------------------------|---|
| 4. | FA_DE_L | /Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Facts/ACCOUNT_SNAPSHOT/ACCOUNT_SNAPSHOT_PRE_FACT |
| 5. | FA_CUSXFA_FPA | /Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Join for Mart Load |
| 6. | <u>FA_CUSXFA_L</u> | <u>/Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Join for Mart Load</u> |
| 7. | <u>APPLICATION_PRE_DIM</u> | <u>/Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Pre Dimensions</u> |
| 8. | <u>CREDIT_FACILITY_PRE_DIM</u> | <u>/Products/SAS Foundation for Banking Server 5.1/Foundation Mart/Jobs/Pre Dimensions</u> |

- iii. Right-click the jobs and then select Scheduling → Deploy
- iv. In the Deploy a job for scheduling dialog box, from the Batch Server list, select <Application Server> – SAS DATA Step Batch Server.

- v. From the Deployment Directory list, select a directory pointing to
<SASCONFIG>/Applications/SASBankingFoundation5.1/deployed_jobs/
foundationmart
- vi. Click OK.
- vii. Do not change the default values in the Deployed Job Name field and in the
Location field.
- viii. Click OK.
- ix. After the jobs are deployed successfully, the deployed job files are created
in the deployment directory
<SASCONFIG>/Applications/SASBankingFoundation5.1/deployed_jobs/
foundationmart) with new timestamp of current time.
- x. In the similar manner, deploy the following job by selecting a deployment
directory pointing to
<SASCONFIG>/Applications/SASBankingFoundation5.1/deployed_jobs/
inputmart

| <u>No</u> | <u>Job Name</u> | <u>Path of job in Metadata</u> |
|-----------|-----------------|--|
| 1. | IND_ACCOUNT_DIM | /Products/SAS Foundation for Banking Server 5.1/Input Mart/Jobs/Dimension Base Tables |

Important Note:

Loss Given Default (LGD) processing and calculation of statistical measures for application scoring have been modified as a part of this hot fix. Please click on the link below to access documentation regarding this change:

[LGD and Statistical Measures Changes](#)

This completes the installation of hot fix **I92003** on **UNIX**.