

SAS Marketing Optimization 4.1

Installation Instructions for Hot Fix 41MO01 on Unix

Introduction

This document describes the steps necessary to install and deploy the SAS Marketing Optimization 4.1 Hot Fix 41MO01. ***Please take a moment to read through this entire document before attempting to install the hot fix.*** There are three parts to this hot fix that must all be completed:

1. Installation of updates to all SAS Marketing Optimization Client applications on Windows
2. Installation of updates to the SAS Marketing Optimization Server on Unix
3. Configuration of the SAS Marketing Optimization Server components

The hot fix 41MO01 addresses the issues in Release 4.1 of SAS Marketing Optimization software as documented in the "Issues Addressed" section of the hot fix download page:

<http://ftp.sas.com/techsup/download/hotfix/mo41.html#41mo01>

This hot fix contains the following file:

- **41mo01srv.tar**: the server component update file to be extracted on the MO 4.1 Server installation.

Getting Started

Before you download Hot Fix 41MO01, please address the following:

1. You must have the SAS Marketing Optimization 4.1 Server installed on your system before applying this hot fix.
2. This hot fix should be applied only to SAS Marketing Optimization Servers that reside on Unix hosts to support connectivity to SAS Marketing Optimization Clients running on Windows.
3. You must install SAS 9.1.3 Service Pack 2 prior to installing this hot fix. Service Pack 2 is available at: http://ftp.sas.com/techsup/download/hotfix/d9_sbcs_prod_list.html.
4. When applying the hot fix to the Server, the installer must be run under the same userid who performed the SAS 9.1.3 installation.

STEP 1: Install Hot Fix 41MO01 on SAS Marketing Optimization Clients

Before configuring the SAS Marketing Optimization Server, you should apply the appropriate hot fix on your SAS Marketing Optimization Clients on Windows. Please refer to http://ftp.sas.com/techsup/download/hotfix/mkt_opt/41mo01/win/41mo01wn.pdf (available on the download table for Hot Fix 41MO01 on Windows) for full details regarding the installation and configuration of the MO Client and its relation to the Server side updates.

1. Download the hot fix package from the SAS Technical Support Hot Fix website at <http://ftp.sas.com/techsup/download/hotfix/mo41.html#41mo01>. The hot fix package downloaded is a self-extracting executable named `41mo01wn.exe`.
2. Launch the executable to initiate the install wizard for the MO 4.1 Java Client-side components.
3. Execute this file on each MO 4.1 client installation at your site.

STEP 2: Install Hot Fix 41MO01 on SAS Marketing Optimization Server

1. Download the hot fix package from the SAS Technical Support Hot Fix website at <http://ftp.sas.com/techsup/download/hotfix/mo41.html#41mo01>. The hot fix package downloaded is a tar file named `41mo01srv.tar`.
2. Extract the contents of the tar file downloaded into a temporary directory, for example `/tmp`:

```
$> cd /tmp/  
$> tar -xf /tmp/41mo01srv.tar
```

This will create a directory called `41mo01_srv` in the current working directory. This directory will contain 3 files:

```
mo_create_tables.sas  
mo_create_user.sas  
mo_edit_user.sas
```

3. Copy the macro files to the appropriate MO Server path. The files should be placed in the following directory:

```
<SASROOT>/ucmacros/mktopt
```

where `<SASROOT>` is the location where your SAS 9.1.3 image is installed.

4. Remove the `/tmp/41mo01_srv` directory and its contents.

STEP 3: Configure the SAS Marketing Optimization Server

If you have installed this hot fix on an *existing* installation of SAS Marketing Optimization 4.1 with existing users defined, you must complete the following steps in order to configure your installation to comply with changes implemented in the hot fix.

IMPORTANT NOTE: If you have installed this hot fix on a *new* installation of SAS Marketing Optimization 4.1, please proceed to and review the section below entitled "**Changes to Installation Instructions for SAS Marketing Optimization 4.1**" before completing your installation.

1. Locate your SAS Marketing Optimization configuration files on the Server machine (e.g., <SASMODIR>/config), where <SASMODIR> is the location to which you copied and configured these files during your initial SAS Marketing Optimization 4.1 installation.
2. Start the Object Spawner by executing the following command, where <path_to_objspawn> is the location of the objspawn.cfg found in the previous step, and <SASROOT> is the location of the local SAS install directory:

You must start the object spawner with an administrator or system account. For more information on the required user rights, see http://support.sas.com/rnd/itech/doc9/admin_oma/sasserver/startserv/sp_suu_nx.html.

```
<SASROOT>/utilities/bin/objspawn -configfile  
<path_to_objspawn>/objspawn.cfg &
```

Note that the "-nosecurity" option has been removed from this command. If you use a script to start the object spawner, edit the file to remove this option. This is the command you should use to start the object spawner from this point forward.

3. Start the SAS/SHARE server, as you have in the past, by executing the following command, where <path_to_shrauto> is the location of the shrauto.sas file found in 1., and <path_to_shrauto_log> is a place where the SAS/SHARE server can log its output:

```
<SASROOT>/sas -nodms -autoexec <path_to_shrauto>/shrauto.sas -log  
<path_to_shrauto_log>/shrsrv.log &
```

4. Start an interactive SAS session by issuing the following command, where <path_to_autoexec> is the location of the autoexec.sas file. This file is typically in the same location as the configuration files listed above:

```
<SASROOT>/sas -dms -autoexec <path_to_autoexec>/autoexec.sas
```

5. This hot fix requires that all users defined to MO have user accounts defined to the SAS Server. These are user accounts that will be authenticated by the Server.

You will first need to add a new column to the MOMETA.USERS data set called authenticated_username. This column will be created automatically for new installations but needs to be created manually for existing installations where this data set already exists. To add the new column, submit the following code in a SAS Program Editor:

```
data mometa.users;  
  set mometa.users;  
  length authenticated_username $ 32 ;
```

```
run;
```

6. In the SAS Explorer window, open the SAS Library allocated by the autoexec called `MOMETA`.
7. Open the `Users` data set in this library and set Edit mode by selecting **Edit → Edit Mode** from the menu bar.
8. Edit the `Users` data set to change the existing MO usernames to corresponding user accounts defined to the Server:
 - a. Edit the values in the `username` column to actual user accounts (userids) that are defined to the Server. At minimum, you should have the “`moadmin`” account registered that needs to be changed to a valid userid on the Server.
 - b. *Remove* any values in the `password` column because these will no longer be stored in this data set.
 - c. In the `authenticated_username` column you created, add the username for each user in the proper form.
 - d. Repeat these steps for any users registered in this data set.
 - e. When finished, save and close the data set.
9. In the same `MOMETA` library, open the `Properties` data set in Edit mode.
10. Select **Edit → Add Row** to add a new record. Enter `SERVER_PLATFORM` in the Key column and `UNIX` in the Value column. The attributes must be in all capital letters as shown. When finished, save and close the data set. You may also close the interactive SAS session.
11. Locate the `projects` directory for your SAS Marketing Optimization installation on the Server (e.g., `<SASMODIR>/projects`). You configured this directory during your initial SAS Marketing Optimization 4.1 installation. A subdirectory is created for each user defined to this installation. Rename these user directories to reflect the new `username` values defined in the `MOMETA.USERS` data set. For example, rename `<SASMODIR>/projects/moadmin` to `<SASMODIR>/projects/<userid>`.

This completes the installation and configuration of hot fix 41MO01 on Unix.

Changes to Installation Instructions for SAS Marketing Optimization 4.1

Components in SAS Marketing Optimization 4.1 affected by this Hot Fix require changes to the installation instructions provided with the software. Please make note of the following changes before proceeding with your installation and configuration.

These changes refer to steps listed in the "**Configure SAS Marketing Optimization Server Software**" section of your install documentation.

- **Step 5: Start the Object Spawner.** You must start the object spawner with an administrator or system account. For more information on the required user rights, see http://support.sas.com/rnd/itech/doc9/admin_oma/sasserver/startserv/sp_suunx.html.

Start the object spawner with the following command:

```
<SASROOT>/utilities/bin/objspawn -configfile  
<path_to_objspawn>/objspawn.cfg &
```

Note that the "-nosecurity" option has been removed from this command.

- **Step 8: Create a Marketing Optimization administrative user definition.** Note that the username must be a userid that is defined to the Server and will authenticate on the Server. In addition, you do not need to provide a password. Omit the `password` parameter.
- **Step 9: Log In.** Log in using the username provided in Step 8 and the password associated with this account on the Server.