SAS Marketing Optimization 4.1

Installation Instructions for Hot Fix 41MO01 on Windows

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
2. Installation of updates to the SAS Marketing Optimization Server
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 on Windows 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 files:

- **41mo01clnt.exe:** the Java client update files, auto installed when 41MO01wn is executed

- **41mo01srvr_wn.exe:** the server component update file to be copied and executed on the MO 4.1 Server installation. This file will be located in `C:\41MO01` on the client machine after 41MO01wn execution.

- **41mo01wn.pdf:** a copy of these installation instructions. This file is installed in `C:\41MO01`.

Getting Started

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

1. You must have the SAS Marketing Optimization 4.1 Client installed on your system before applying this hot fix.

2. You must have Administrator Privileges on your CLIENT machine and all currently active SAS Marketing Optimization sessions must be terminated before applying this hot fix.

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/hotfix.html**.

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

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

After installing the hot fix on the MO clients, you must then update your MO Server Installation using the `41mo01srvr_wn.exe file` provided with this hot fix.

1. Locate the `41mo01srvr_wn.exe` file in `C:\41MO01`.

2. Transfer this file to the applicable Server machine.

3. Launch the executable. It will initiate an install wizard for the MO 4.1 Server-side components.

You must install the server component of this hot fix before this hot fix is considered to be successfully installed. Failure to do so can result in unexpected behavior.

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., `C:\MO4\config` on Windows). You 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_suw in.html**.

   `"<SASROOT>\objspawn.exe" -configfile "<path_to_objspawn>\objspawn.cfg"`

Note that the "`-nosecurity`" option has been removed from this command. If you use a `*.bat` file 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.

Example:
```
"C:\Program Files\SAS\SAS 9.1\objspawn.exe" -configfile
"C:\MO4\config\objspawn.cfg"
```

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.exe" "<path_to_shrauto>\shrauto.sas" -log
"<path_to_shrauto_log>\shrsrv.log" -logparm "open=append rollover=auto"
-awstitle "SAS ShrSrv" -nosplash –noterminal
```

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.exe -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 that are defined to the Server. Replace any slashes "\" with underscores "_", e.g. "`<domain>_<userid>`". 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, including slashes, e.g. "`<domain>\<userid>`".
    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 `WINDOWS` 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., `C:\MO4\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 `C:\MO4\projects\moadmin` to `C:\MO4\projects\<domain>_<userid>`.

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

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_suwin. html**.
  Start the object spawner with the following command:

  ```
  "<SASROOT>\objspawn.exe" -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.