

SAS Marketing Optimization

Windows Installation Instructions for Hot Fix 51mo14

Introduction

This document describes the steps necessary to install and deploy the SAS Marketing Optimization 5.1 hot fix release 51mo14 for the Windows environment. Please take a moment to read through this entire document before beginning the install for this hot fix. There are three steps to this hot fix that must be completed:

1. **Create the appropriate backups**
2. **Extract the three components from the hot fix package**
3. **Install the individual components that apply to your system**

The hot fix 51mo14 addresses the issue(s) in Release 5.1 of SAS Marketing Optimization software on Windows as documented in the "Issue(s) Addressed" section of the hot fix download page:

<http://ftp.sas.com/techsup/download/hotfix/mo51.html#51mo14>

IMPORTANT NOTES:

1. You must have SAS Marketing Optimization 5.1 installed on your system before applying this hot fix.
2. You must have Administrator Privileges on your CLIENT or SERVER machine.
3. All currently active SAS sessions, daemons, spawners and servers must be terminated before applying this hot fix. Once the hot fix has been installed, the appropriate servers should be restarted.

Installation Details

1. Create the appropriate backups

Technical Support strongly suggests that you back up the files being replaced by this hot fix. You should always try to include the current date in the name of the backup file created to distinguish between versions of backup files. By doing this you will maintain a history of the file, which will be helpful when multiple iterations of a hot fix have been applied to the same file.

*** IMPORTANT NOTE: For the jar files, these backups must be created in a directory other than the directory that the original file resides in.

For example, copy the file

c:\foo\sas.foo.jar

to

c:\foo_backup\sas.foo.jar.07012006

where 07012006 is the date when the hot fix is applied.

The <date> extension MUST be appended AFTER the .jar extension as it appears above.

It is not necessary to create backups for the files installed by the **server** installer (51mktopt14wn.exe). These backups will be created automatically.

The files that should be backed up for the **midtier** component of this hot fix (51mktoptmid14wn.exe) are:

SASMarketingOptimizationServer\5.1\applicationContext.xml
 SASMarketingOptimizationServer\5.1\war\WEB-INF\applicationContext.xml
 SASMarketingOptimizationServer\5.1\war\WEB-INF\lib\sas.analytics.mo.server.jar
 SASMarketingOptimizationServer\5.1\bea\sas.analytics.crm.ma.core-client.jar
 SASMarketingOptimizationServer\5.1\ibm\sas.analytics.crm.ma.core-client.jar
 SASMarketingOptimizationServer\5.1\war\WEB-INF\lib\sas.analytics.crm.ma.core-client-ibm.jar
 SASMarketingOptimizationServer\5.1\war\WEB-INF\lib\sas.analytics.crm.ma.core-client.jar

For the **client** component of this hot fix (51mktoptweb14wn.exe), you will need to:

- create backups for the following files:
 - SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo_5.1.0\sas.analytics.mo.client.jar
 - SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\sas.analytics.mo.spring.jar
 - SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\lib\jars\sas.analytics.mo.server-client.jar
 - SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\lib\jars\iText.jar
 - SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\META-INF\MANIFEST.MF
- remove the iText.jar file from the following location (if it exists):
 SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\lib\jars\itext.jar

2. Extract the three components from the hot fix package

The hot fix package downloaded is a self extracting executable named 51mo14wn.exe. Launching the executable will extract three components into c:\51mo14, as follows:

51mktopt14wn.exe - contains updates to the server
 51mktoptmid14wn.exe - contains updates to the midtier
 51mktweb14wn.exe - contains updates to the client

3. Install the individual components that apply to your system.

3.1 Installing 51mktopt14wn.exe

Run 51mktopt14wn.exe on the machine where the SAS Marketing Optimization server is installed (this may require copying the file to the appropriate machine). The following files will be installed in c:\51mo14\mktopt:

mktoptwn.exe
 mo_migration_hf.sas

3.1.1 Run mktoptwn.exe

Launching this executable will initiate the install wizard, which will guide you through the setup process. The following files will be installed with the respective modified dates:

<!SASROOT>\mktopt\ucmacros\mo_copy_project.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_copy_scenario.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_create_input_data.sas	04/30/2010
<!SASROOT>\mktopt\ucmacros\mo_create_scenario.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_create_tables.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_delete_scenario_element.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_edit_optimization_pid.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_import_solution.sas	06/01/2009

<!SASROOT>\mktopt\ucmacros\mo_ma_agent_and_time.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_prepopulate_metadata_tables.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_promote_solution.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_refresh_update_scen_tables.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_rpt_compare_constraint_table.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_rpt_compare_offer_graph.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_rpt_compare_offer_table.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_rpt_constraint_summary_table.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_set_job_flow_scen.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_validate_imported_solution.sas	06/01/2009
<!SASROOT>\mktopt\ucmacros\mo_validate_input_data.sas	05/04/2010
<!SASROOT>\mktopt\cmacros\sasmacr.sas7bcats	09/28/2010
<!SASROOT>\mktopt\sasexe\mo	06/05/2009

3.1.2 Run mo_migration_hf.sas

- Restart the appropriate SAS servers and spawners.
- BACK UP the existing SCENARIOS table in the datastore. The datastore is located in the Lev1\SASMain\Data\MarketingOptimization\datastore directory. For example, if your Marketing Optimization 5.1 installation was done in c:\SAS\MO51, then the datastore is located in c:\SAS\MO51\ Lev1\SASMain\Data\MarketingOptimization\datastore. If the datastore does not contain a SCENARIOS table, you do not need to run this migration program and you can skip to step 3.2.
- Start an interactive SAS session with the MO 5.1 autoexec and submit the program mo_migration_hf.sas from the Program Editor. The MO 5.1 autoexec is located in the Lev1\SASMain directory. For example, if your Marketing Optimization 5.1 installation was done in c:\SAS\MO51, then the MO 5.1 autoexec is located in c:\SAS\MO51\Lev1\SASMain\MarketingOptimization_autoexec.sas. The mo_migration_hf.sas file was installed by the hot fix in c:\51mo14\mktopt.
- Verify the program runs successfully with no errors or warnings in the log.

3.2 Installing 51mktoptmid14wn.exe

3.2.1 Run 51mktoptmid14wn.exe

Launching this executable will install the following files:

```

SASMarketingOptimizationServer\5.1\applicationContext.xml
SASMarketingOptimizationServer\5.1\war\WEB-INF\applicationContext.xml
SASMarketingOptimizationServer\5.1\war\WEB-INF\lib\sas.analytics.mo.server.jar
SASMarketingOptimizationServer\5.1\bea\sas.analytics.crm.ma.core-client.jar
SASMarketingOptimizationServer\5.1\ibm\sas.analytics.crm.ma.core-client.jar
SASMarketingOptimizationServer\5.1\war\WEB-INF\lib\sas.analytics.crm.ma.core-client-ibm.jar
SASMarketingOptimizationServer\5.1\war\WEB-INF\lib\sas.analytics.crm.ma.core-client.jar
SASMarketingOptimizationServer\5.1\Config\mktoptmid_hf.xml
SASMarketingOptimizationServer\5.1\Config\MOTtransform.xsl

```

3.2.2 Run the Post-configuration Ant script

The 51mo14 hot fix has installed a post-configuration script, mktoptmid_hf.xml, which will repackage sas.analytics.mo.server.war with updated code. You will find mktoptmid_hf.xml in the SAS installation directory SASMarketingOptimizationServer\5.1\Config.

- Navigate to the bin subdirectory where ant is installed:

Example: cd C:\Program Files\SAS\SASEclipsePlugins\3.2\sites\org.apache.ant_1.6.5\eclipse\plugins\org.apache.ant_1.6.5\bin

Set JAVA_HOME for session if needed for your specific installation. In order for the post-configuration script to repackage the war file with updated code, JAVA_HOME must point to a JDK.

Example: set JAVA_HOME=C:\jdk1.4.2_15

b) Run the Post-configuration Ant script

```
ant -f mktoptmid_hf.xml
-Dconfig.dir=<CONFIGDIR>
-Dtemp.dir=<TEMPDIR>
-Dinstall.loc=<INSTALL_DIR>
-DMO_EmailServerName=<EMAIL SERVER>
```

where:

<CONFIGDIR> is the path to the Configuration Directory (eg. C:\SAS\MO51), where the new sas.analytics.mo.server.war file will be copied when the hot fix is applied by executing the ant scripts.

<TEMPDIR> is a path to an empty temporary directory for temp files. Make sure this location is empty so that the script can execute without errors when it performs the clean up.

<INSTALL_DIR> is the location of the product install (eg. C:\Program Files\SAS\SASMarketingOptimizationServer\5.1)

<EMAIL SERVER> is the name of your email server (eg. My.email.server.com)

Helpful hint: create a .bat file with the command above in case you need to make corrections.

Example:

```
ant -f "c:\Program Files\SAS\SASMarketingOptimizationServer\5.1\Config\mktoptmid_hf.xml"
-Dconfig.dir="c:\SAS\MO51"
-Dtemp.dir="c:\Program Files\SAS\SASMarketingOptimizationServer\5.1\hotfix_tmp"
-Dinstall.loc="c:\Program Files\SAS\SASMarketingOptimizationServer\5.1"
-DMO_EmailServerName="my.email.server.com"
```

Final messages from the execution of the script should be similar to:

BUILD SUCCESSFUL

Total time: 11 seconds

Note: A complete log from the ant script can be found in the SAS installation directory c:\Program Files\SAS\SASMarketingOptimizationServer\5.1\mktoptmid_hf.log.

3.2.3 Deploy the Mid-Tier

Deployment Instructions for BEA WebLogic:

After logging into the Weblogic console, navigate to Deployments -> Web Application Modules -> sas.analytics.crm.mo.server in the left panel. (Note that your application name may vary.) Select the Configuration tab to verify your deployment path is the <configuration install root>\Lev1\web\webapps\exploded directory where the updated war now resides.

Select the 'ReDeploy' tab under the "Actions" column

Deployment Instructions for IBM WebSphere

Re-deploy SAS Customer Intelligence war components using the Websphere Admin console.

- Navigate to Applications->Enterprise Applications
- Select the Stop button to stop sas_analytics_mo_server_war
- Select the update button to update sas_analytics_mo_server_war
- On the next screen, fill in the path to the sas_analytics_mo.server_war file. This is by default in the <configuration install root>\Lev1\web\webapps directory
- Type sas.analytics.mo.server as the Context Root
- Choose Next
- Choose Next
- Choose Continue on the Application Security Warnings panel
- Step1: choose Next
- Step2: choose Next
- Step3: check the box for Web Module sas.analytics.mo.server.war, then choose Next
- Summary: choose Finish
- Save

3.3 Installing 51mktweb14wn.exe

Run 51mktweb14wn.exe on the machine where the SAS Marketing Optimization client is installed (this may require copying the file to the appropriate machine). Launching this executable will install the following files:

SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo_5.1.0\sas.analytics.mo.client.jar
SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\sas.analytics.mo.spring.jar
SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\lib\jars\sas.analytics.mo.server-client.jar
SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\lib\jars\itext-1.3.6.jar
SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\META-INF\MANIFEST.MF

Be sure to backup and then remove

SASMarketingOptimization\5.1\plugins\com.sas.analytics.mo.spring_5.1.0\lib\jars\iText.jar, as recommended in step 1 above.

NOTE: This component must be updated on **EVERY** client box that is being used.

This completes the installation of hot fix 51mo14 on Windows.