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# **SAS<sup>®</sup> Web Parts 6.1 for Microsoft SharePoint:**

User's Guide

**Third Edition**

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**SAS® Web Parts 6.1 for Microsoft SharePoint: User's Guide, Third Edition**

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# Using This Book

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## Audience

This book is intended for users of Microsoft SharePoint 2010 and 2013. SAS Web Parts for Microsoft SharePoint is designed for creators and consumers of web pages in Microsoft SharePoint.

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## Requirements

### Prerequisites

Here are the prerequisites for SAS Web Parts for Microsoft SharePoint:

- Administrators at your site should have installed and configured all necessary components of the SAS Enterprise Intelligence Platform. For information about how to install and configure SAS Web Parts for Microsoft SharePoint, see the *SAS Intelligence Platform: Installation and Configuration Guide* and the *SAS Intelligence Platform: Web Application Administration Guide*.
- You must have permission to access the SAS Metadata Server. SAS support personnel at your site set these permissions and provide the name and location of the SAS Metadata Server.
- You must be running Google Chrome, Mozilla Firefox, or Microsoft Internet Explorer 9 or later.

## **Support for Web Browsers**

Microsoft Internet Explorer and Mozilla Firefox are fully supported.

Here are two limitations when using Google Chrome as your web browser:

- In the SAS Content Web Part, you cannot browse for the content to add to the web part. However, you can view content after you add it to the web part by using Internet Explorer or Firefox.
- In the SAS Central Web Part, you can view your recent reports and favorites and can view them in SAS Visual Analytics Viewer. However, you cannot browse to open a new report if you are using Chrome.

## What's New

# What's New in SAS Web Parts 6.1 for Microsoft SharePoint

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## General Enhancements

Here are the new features and enhancements that are available in SAS Web Parts 6.1 for Microsoft SharePoint:

- Now, your SAS Web Parts administrator can create connection profiles for the SharePoint users at your site. A profile defines the connection between the SAS Web Parts for Microsoft SharePoint and a SAS Metadata Server.
- Two SAS Web Parts are available:
  - The SAS Central Web Part lists any SAS Visual Analytics reports that you recently opened and any favorites that you have created. It also enables you to open additional reports. These reports open in a new web browser.  
**Note:** The SAS Central Web Part is available only if your site licenses SAS Visual Analytics.
  - The SAS Content Viewer Web Part enables you to add SAS content (such as reports and the results from a stored process or a dashboard) to your SharePoint site.

In the first maintenance release for SAS Web Parts 6.1 for Microsoft SharePoint, you can view the comments for reports. If you are working on a desktop computer, you can open the report in SAS Visual Analytics Viewer. If you are working on an iPad, you can view the report in the BI Mobile application.

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## Administrative Enhancements

In first maintenance release for SAS Web Parts 6.1 for Microsoft SharePoint, the `-Upgrade` parameter is available in the `Enable-SASWebParts` and `Install-SASWebParts` functions.

- When you specify the `-Upgrade` parameter on the `Enable-SASWebParts` function, the current default profile (if it already exists) is not modified when you upgrade to the latest release of SAS Web Parts for Microsoft SharePoint.
- When you specify the `-Upgrade` parameter on the `Install-SASWebParts` function, any previous release of SAS Web Parts for Microsoft SharePoint is uninstalled before upgrading to the latest release. If a default profile existed in the previous release, that information remains intact.

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## Documentation Enhancements

The *SAS Web Parts for Microsoft SharePoint: User's Guide* and *SAS Web Parts for Microsoft SharePoint: Administrator's Guide* are now available.

# Accessibility

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For information about the accessibility of this product, see [Accessibility Features of SAS Web Parts 6.1 for Microsoft SharePoint](#).

**x** *SAS Web Parts for Microsoft SharePoint*

## 1

# Introduction to SAS Web Parts for Microsoft SharePoint

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## What Are the SAS Web Parts for Microsoft SharePoint?

Web Parts are an integrated set of controls that enable you to provide customized, dynamic content on your website. By using Microsoft Windows SharePoint Server, you can add SAS content directly to your website.

When you open a web page that contains SAS content, one of these scenarios occurs:

- The SAS Central Web Part displays an up-to-date report or prompts you to specify values for the report. Prompts are often used in stored processes because prompts enable the site visitor to select what content to include in the report. For example, a sales manager in the East can generate a report of sales data for the East region, and a sales manager in the South can generate a report of sales data for the South region.
- The SAS Central Viewer Web Part appears, and you can access reports that were created by using SAS Visual Analytics.

When you use a SAS Web Part, caching is performed by SAS rather than Microsoft SharePoint. SharePoint determines whether you have permission to open a given site or page. The user name that you used in Microsoft SharePoint is passed to SAS. The SAS Metadata Server uses that user name for security and permission checks. If SAS cannot authenticate you, then you can view the SharePoint site, but you cannot view the SAS content.

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## **Benefits to Using the SAS Web Parts for Microsoft SharePoint**

The SAS Web Parts for Microsoft SharePoint enables you to add SAS content to your SharePoint pages. If your organization uses SharePoint as a portal for collaboration or information dissemination, placing SAS content on SharePoint pages makes it easier for users to find and monitor their SAS reports. Because Web Parts are pulling SAS content in real time, the viewer is seeing up-to-date reports and not reports that were created in the past. This integration approach works well for content that needs to be generated quickly.

# 2

## Working with the SAS Central Web Part

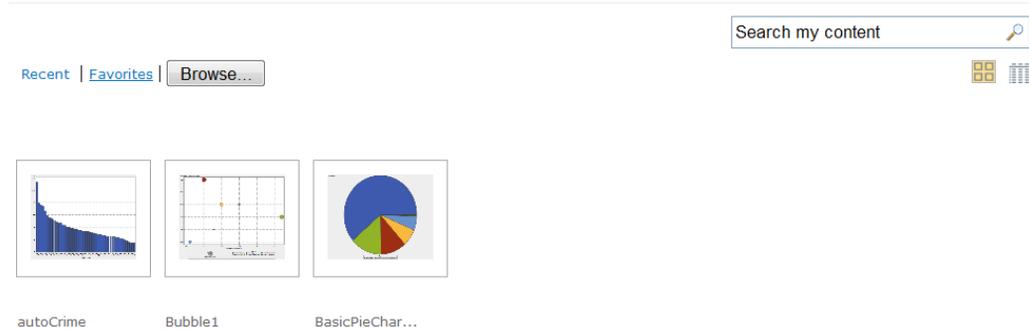
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### What Is a SAS Central Web Part?

The SAS Central Web Part is available only if your site also licenses SAS Visual Analytics. From the SAS Central Web Part, you can open reports that were created in SAS Visual Analytics, view the results from a stored process, and open a dashboard. You can also access reports that you have recently worked with and any favorites that you have created.

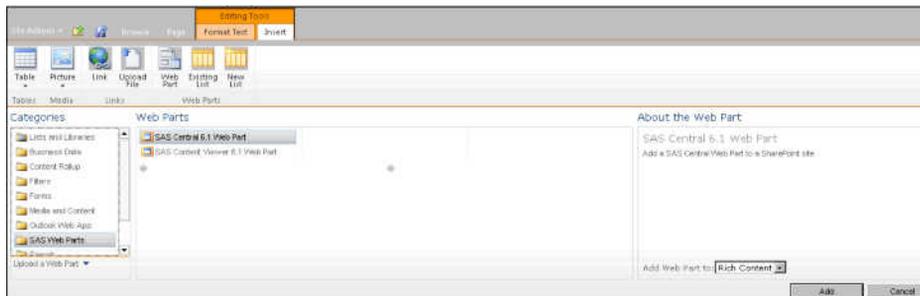
### SAS Central 6.1 Web Part



## Add a SAS Central Web Part

To add a SAS Central Web Part to an existing SharePoint page:

- 1 Change the page to Edit mode.
- 2 From the Editing Tools, select **Insert** ► **Web Part**.
- 3 In the **Categories** panel, select **SAS Web Parts**.
- 4 In the **Web Parts** panel, select **SAS Central 6.1 Web Part**, and click **Add**.



A container for the SAS Central Web Part appears on the SharePoint page.

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## Open a Report and Include It in the SAS Central Web Part

To open a report and include it in the SAS Central Web Part:

- 1 In the SAS Central Web Part, click **Browse**. The Select SAS content dialog box appears.
- 2 Select the report that you want to view and click **OK**. The report appears in a new web browser window. In the SAS Central Web Part, the report now appears under your list of recent reports.

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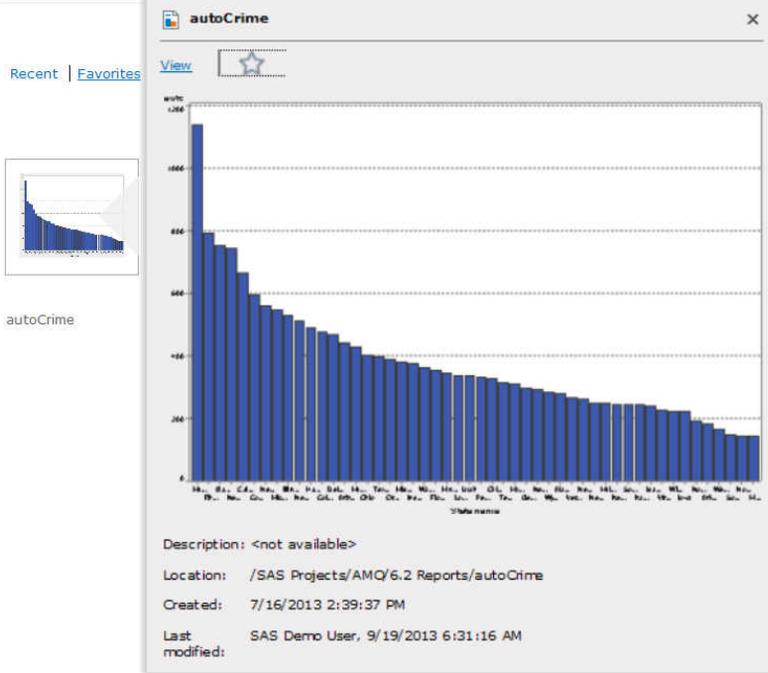
## Add a Favorite to the SAS Central Web Part

To add a favorite to the SAS Central Web Part:

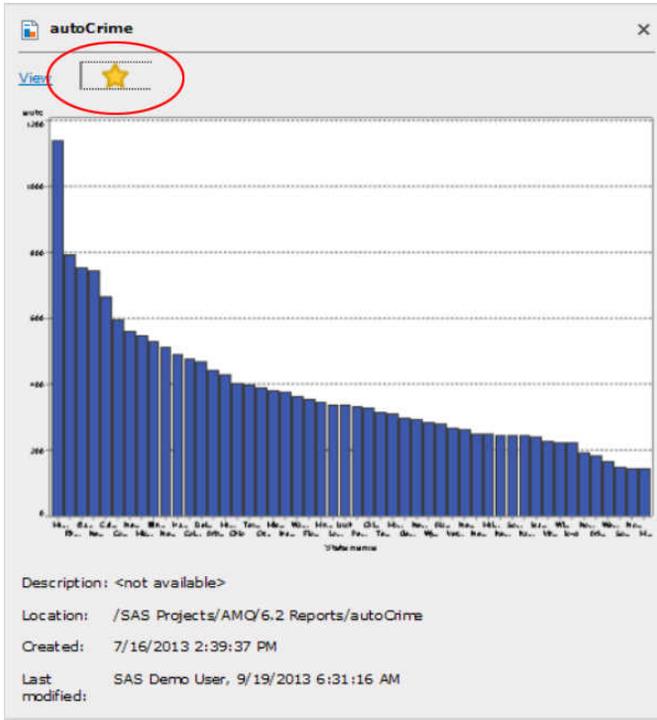
- 1 In the SAS Central Web Part, click **Recent** to view your recent reports.
- 2 Select the report that you want to add to your list of favorites. A flyout of the report appears.

**Note:** A thumbnail view of the report is available only if your SAS administrator changes the default setting in SAS Visual Analytics. For more information, see *SAS Visual Analytics: User's Guide*.

SAS Central 6.1 Web Part



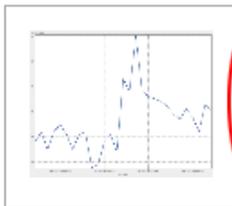
- 3 To add the report to your list of favorites, click the star icon. When a report is a favorite, the color of the star is yellow.



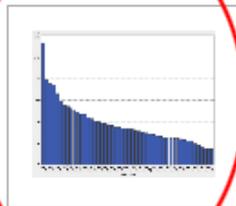
Close this flyout. To view your favorites, click **Favorites**.

## SAS Central 6.1 Web Part

[Recent](#) | [Favorites](#) | [Browse...](#)



Report\_test1



autoCrime



# 3

## Working with the SAS Content Viewer Web Part

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### What Is a SAS Content Viewer Web Part?

A SAS Content Viewer Web Part enables you to add SAS content to your Microsoft SharePoint site. You can add the results from reports such as the SAS Report (2G) and the results from a stored process, or you can open a dashboard.

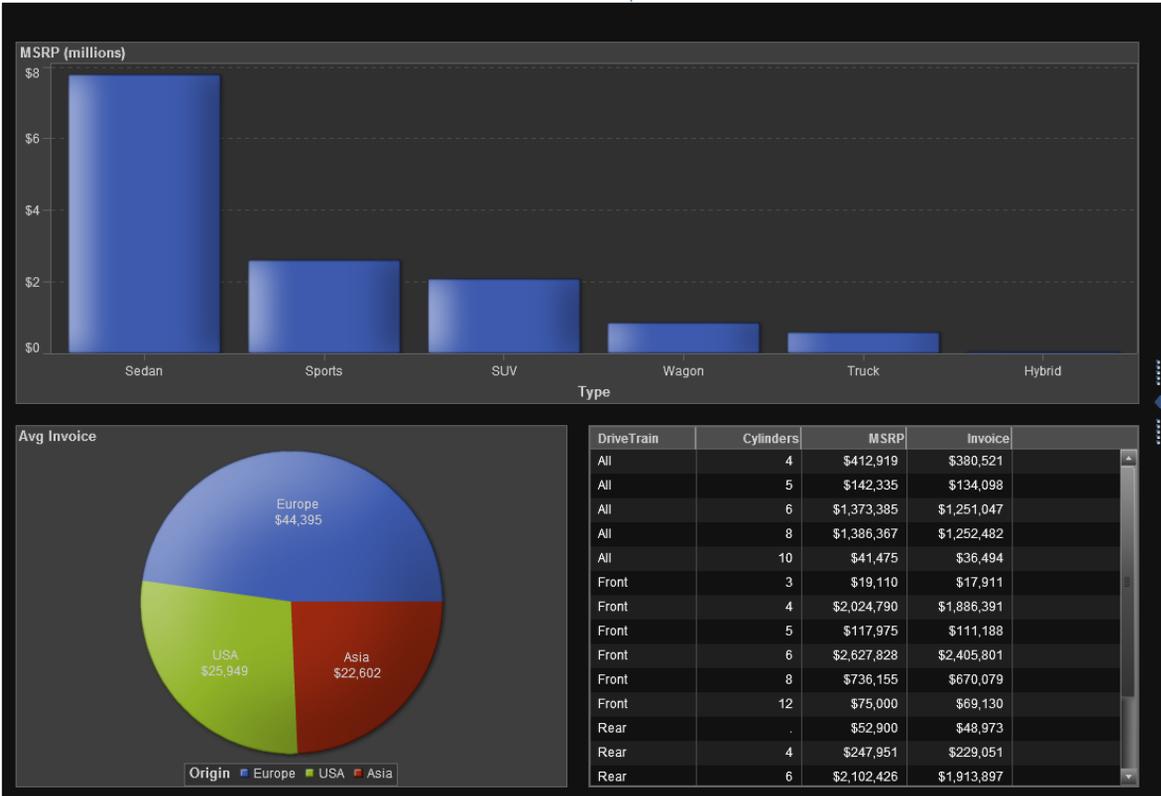
**Note:** The SAS Central Viewer Web Part supports only one stored process at a time on a Microsoft SharePoint page.

Here is an example of a report in the SAS Content Viewer Web Part:

SAS Content Viewer 6.1 Web Part

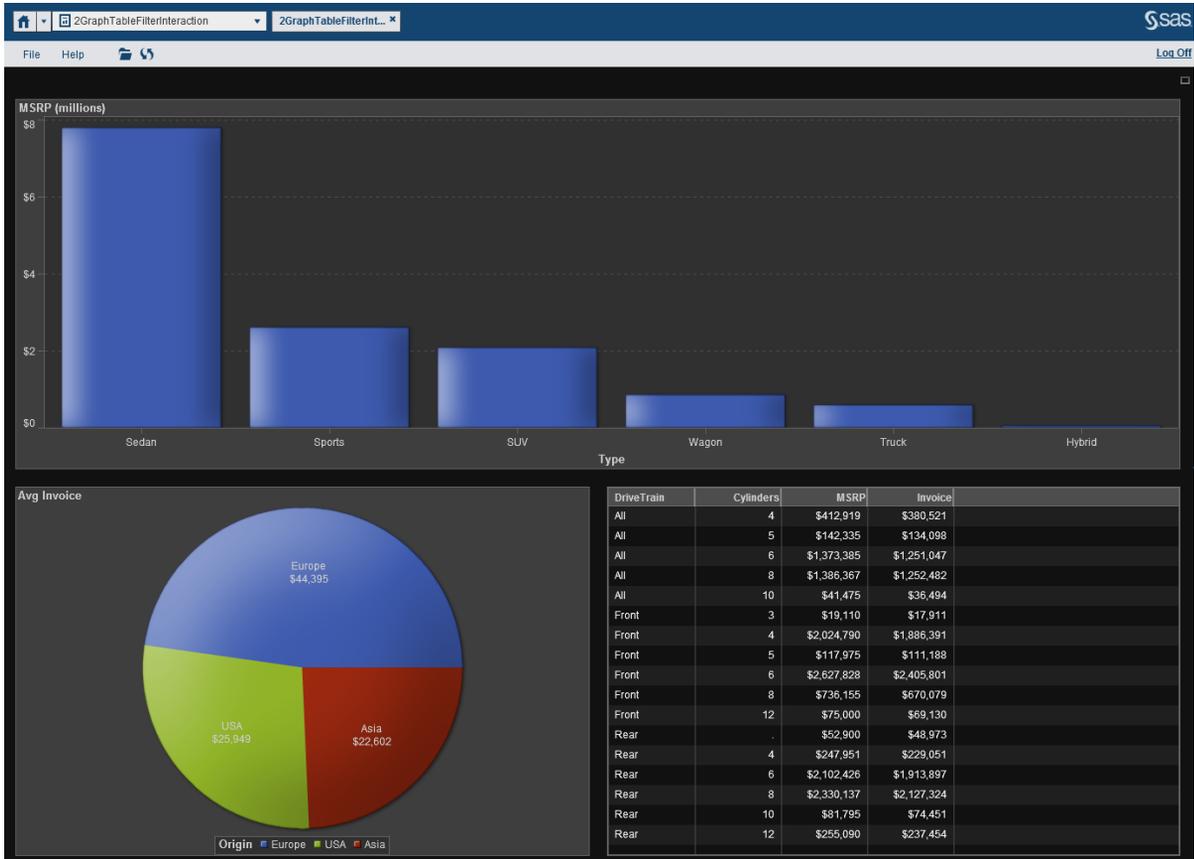
## Car Sales

[Open Viewer](#) [Details](#)



**Note:** If the report that you selected contains comments, then the **Show Comments** option is also available.

If you are working on a desktop computer and you click **Open Viewer**, the report opens in SAS Visual Analytics Viewer.



If you are working on an iPad and you click **Open Viewer**, the report opens in the BI Mobile app.

## Add a SAS Content Viewer Web Part

To add a SAS Content Viewer Web Part to an existing SharePoint page:

- 1 Change the page to Edit mode.
- 2 From the Editing Tools, select **Insert** ► **Web Part**.
- 3 In the **Categories** panel, select **SAS Web Parts**.

4 In the **Web Parts** panel, select **SAS Content Viewer 6.1 Web Part**, and click **Add**.



A container for the SAS Content Viewer Web Part appears on the SharePoint page.



- 5 To select the SAS content, click **Select SAS content to display in this section**. The **Connection Profile** panel appears.
- 6 From the **Connection name** drop-down list, select the profile that you want to use. (Profiles are created by the SAS Web Parts administrator.) For more information, see *SAS Web Parts for Microsoft SharePoint: Administrator's Guide*.
- 7 For the **SAS content** option, click **Browse**. The Select SAS content dialog box appears.
- 8 Select the content to include, and click **OK**.
- 9 (Optional) If your content is a SAS Visual Analytics report, select the **Show comments** check box to view any comments that are saved with the report.
- 10 (Optional) Select the **Disable SAS timeout** check box if you do not want the SAS logon page to replace the SharePoint content after 30 minutes of inactivity.
- 11 At the bottom of the **Connection Profile** panel, click **Apply**. The SAS content is now displayed in the SAS Content Viewer Web Part.

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## Customizing the Appearance of a SAS Content Viewer Web Part

By using the options in the **Appearance**, **Layout**, and **Advanced** sections of the tool pane, you can customize the appearance of any Web Part. These options are not specific to the SAS Content Viewer Web Part.

Because the content for a SAS Web Part is generated by SAS, SharePoint cannot adjust the height of the report to fit the zone. If you do not specify a fixed height for the report, the site visitor might see a scroll bar within the web part on the SharePoint page. This scroll bar is in addition to the scroll bar in the web browser. To eliminate double scroll bars, specify a fixed height for your SAS content.



## Recommended Reading

- *SAS Web Parts for Microsoft SharePoint: Administrator's Guide*
- *SAS Intelligence Platform: Installation and Configuration Guide*
- *SAS Intelligence Platform: Web Application Administration Guide*

For a complete list of SAS publications, go to [sas.com/store/books](http://sas.com/store/books). If you have questions about which titles you need, please contact a SAS Representative:

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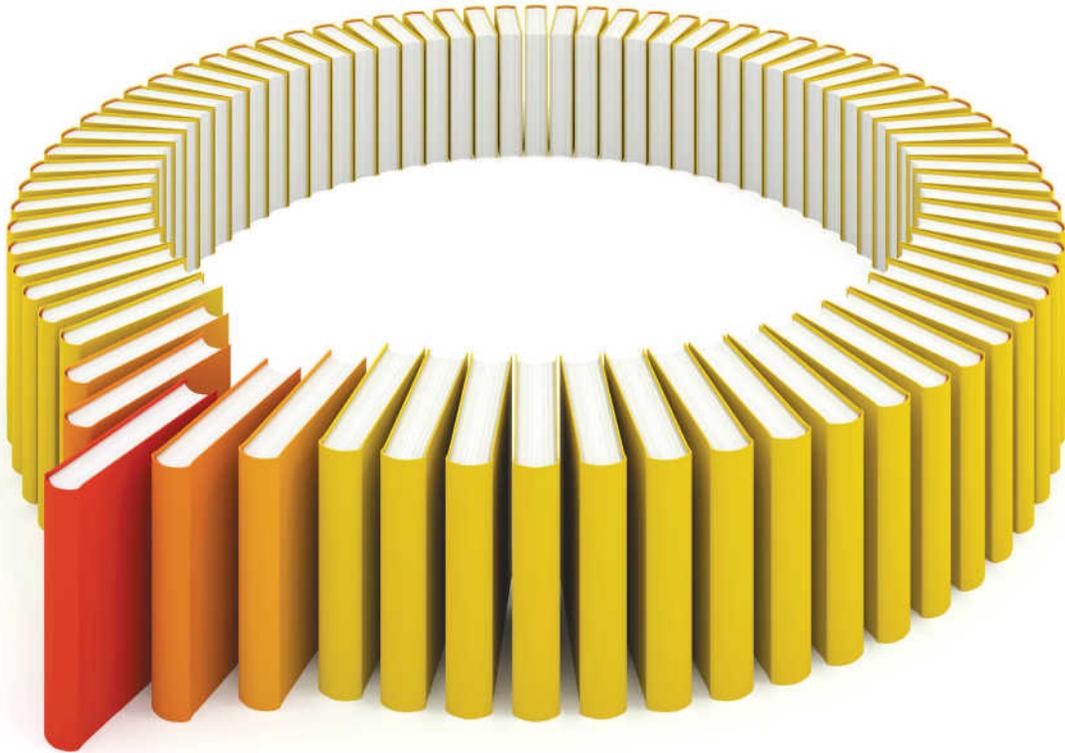
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