Configuration of SAS® Forecast Server 2.1 and the SAS® Add-in for Microsoft Office

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Chapter 1

Configuring of SAS Forecast Server and SAS Add-In for Microsoft Office

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What Is the SAS Add-In for Microsoft Office?

The SAS Add-In for Microsoft Office extends the functionality of Microsoft Excel, Microsoft Word, and Microsoft PowerPoint by enabling you to access SAS analytics and SAS reporting functionality without any SAS programming experience. The SAS add-in is designed for people who are familiar with these Microsoft Office programs but who might be new to SAS.

When the SAS add-in is installed on a client machine, a SAS menu and the SAS Analysis Tools toolbar are automatically integrated into Excel, Word, and PowerPoint.

The SAS add-in includes approximately 80 SAS tasks that enable you to perform a variety of analyses. The Forecast Studio Create Project task, the Forecast Studio Open Project task, and the Forecast Studio Submit Overrides task are available in the Analyze Data window.

What Are the SAS Forecast Studio Tasks?

You can use the SAS Add-In for Microsoft Office to run the following SAS Forecast Studio tasks:

- the Forecast Studio Create Project task to create a SAS Forecast Studio project from an Excel or SAS data source
- the Forecast Studio Open Project task to open the results from a selected series in an existing SAS Forecast Studio project

- the Forecast Studio Submit Overrides tasks to submit overrides for the forecast data in an existing SAS Forecast Studio project

Prerequisites for Using the SAS Forecast Studio Tasks

In order to use the SAS Forecast Studio tasks in the SAS Add-In for Microsoft Office, you must complete the following:

- installation of SAS Forecast Server
- installation of the SAS Add-In for Microsoft Office on each client machine, which is a product in the SAS Enterprise Business Intelligence Server bundle
- download of the Forecast Studio Submit Overrides task from the Software Downloads page at `http://www.sas.com/download` to each client machine. Click the **SAS Add-In for Microsoft Office** link to download the task, and follow the instructions in the Readme.txt file.

  NOTE: The Forecast Studio Submit Overrides task is not installed automatically with the SAS Add-In for Microsoft Office. It is only available if you download it.
- configuration of the SAS Forecast Studio Server to use the SAS Add-In for Microsoft Office

Configuration Instructions

In order to use the SAS Add-in for Microsoft with SAS Forecast Server, you must use the SAS Analytics Platform that provides an embedded Web server. By default, the SAS Analytics Platform is shipped and configured with an embedded Web server.

In order for the SAS Add-In for Microsoft Office functionality to work, you must configure a server in the SAS metadata server by using SAS Management Console. To configure a server, perform the following steps:

1. Open SAS Management Console as the SAS Administrator (e.g., sasadm) and connect to a metadata repository.
2. Right-click on **Server Manager** and select **New Server**.
3. Select the Http Server template and click **Next**.
4. Select **HPF** as the name and click **Next**.
5. Add a new base path by clicking **New**.
6. Type a forward slash (/) in the **Base Path** field, and click **OK**.

7. Click **Next**.
8. Provide the host name of the SAS Analytics Platform and port number of the embedded Web server. The default port is 6098 unless you changed it in the SAS Analytics Platform configuration. Click **Next**.
9. Click **Finish**.

View the SAS Log

If you have problems connecting to the SAS server, then turning on the SAS log might help you. To view the SAS log, perform the following steps:

1. Click on SAS → Options → Results tab.
2. Check **Show SAS log**.