



CHAPTER

1

Using This Manual

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Purpose of This Manual

This manual explains how to use SAS Data Integration Studio to do the following tasks:

- specify metadata for data sources, such as tables in an operational system
- specify metadata for data targets, such as tables in a data warehouse
- create jobs that specify how data is extracted, transformed, and loaded from sources to targets

This manual also summarizes how to set up servers, libraries, and other resources that SAS Data Integration Studio requires. A data warehouse for a fictional company, Orion Star Sports & Outdoors, is used to illustrate these tasks.

Intended Audience for This Manual

This manual is intended for people who assume the following roles:

- SAS Data Integration Studio user—a person who uses SAS Data Integration Studio software to consolidate and manage enterprise data from a variety of source systems, applications, and technologies.
- SAS Data Integration Studio metadata administrator—a person who uses SAS Management Console software to maintain the metadata for servers, users, and other global resources that are required by SAS Data Integration Studio.

This manual is not intended for server administrators—people who install and maintain server hardware or software. However, some SAS Data Integration Studio tasks depend on tasks that the server administrator performs. A common scenario for SAS Data Integration Studio projects is as follows:

- A server administrator installs and starts servers. For details about maintaining these servers, administrators should see the documentation that came with the servers. See also the servers sections in the administering SAS Data Integration Studio chapter and the connecting to common data sources chapter in the *SAS Intelligence Platform: Administration Guide*.

- A metadata administrator uses SAS Management Console to define metadata for servers, users, libraries, and other global resources, as described in Chapter 6, “Main Tasks for Administrators,” on page 53. For details about maintaining global metadata, see the online Help for SAS Management Console. See also the *SAS Management Console: User’s Guide* and the assigning libraries and connecting to common data sources chapters in the *SAS Intelligence Platform: Administration Guide*.
- SAS Data Integration Studio users create process flows that consolidate and manage enterprise data from a variety of source systems, applications, and technologies, as described in “Main Tasks for Creating Process Flows” on page 96. Users are usually told which servers, user identities, libraries, and other global resources to use.

Quick Start with SAS Data Integration Studio

Administrators who want to begin work immediately should read Chapter 6, “Main Tasks for Administrators,” on page 53. Users who want to begin work immediately should read Chapter 7, “Main Tasks for Users,” on page 91.

SAS Data Integration Studio Online Help

This manual is a companion to the online Help for SAS Data Integration Studio. The Help describes all windows in SAS Data Integration Studio, and it summarizes the main tasks that you can perform with the software. The Help includes examples for all source designer wizards, all target designer wizards, and all transformation templates in the Process Library tree. The Help also includes a What’s New topic and a set of Usage Note topics for the current version of the software.

Follow these steps to display the main Help window for SAS Data Integration Studio.

- 1 Start SAS Data Integration Studio as described in “Starting SAS Data Integration Studio” on page 93.
- 2 From the menu bar, select **Help ► Contents**. The main Help window displays.

To display the Help for an active window or tab, click its **Help** button. If the window or tab does not have a **Help** button, press the **F1** key.

To search for topics about concepts or features that are identified by specific words, such as “application server,” display the main Help window, then click the **Search** tab (magnifying glass icon). Enter the text to be found and press the **Enter** key.