



CHAPTER

1

Using This Guide

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Purpose

This guide is designed to introduce metadata programmers to the SAS Open Metadata Architecture and the SAS Open Metadata Interface. It provides a brief introduction to metadata, metadata management, and the benefits of using the SAS Open Metadata Architecture to store technical details about an application. It also walks readers through the steps necessary to set up a personal SAS Metadata Server and a SAS Metadata Repository for a sample application on Windows XP.

Readers will learn how to identify what information they need to represent in metadata and how to select the metadata types that are best suited to represent the information. The guide also provides sample SAS Open Metadata Interface method calls that create, update, query, and delete metadata.

This guide uses a sample scenario to guide you through the steps of using the SAS Open Metadata Interface. The scenario is not intended to represent the only way that the interface can be used to create metadata. Rather, it is provided as a very simple example of *one* way that it can be used.

To get the most out of this guide, acquaint yourself with the metadata concepts in Chapter 2, “Introduction to Metadata Concepts,” on page 5 before reading “Example Scenario” on page 4 and Chapter 3, “Planning a Repository,” on page 9. Then read Chapter 5, “Setting Up a SAS Metadata Server,” on page 23, Chapter 4, “Using the SAS Open Metadata Interface,” on page 15 and Chapter 6, “Adding Metadata Objects to the Repository,” on page 41 for information to set up a SAS Metadata Server and write a SAS Open Metadata Interface client to create your own sample repository.

Note: This guide does not describe how to setup and use a SAS Metadata Server in an enterprise environment. For information about how to setup and use a SAS Metadata Server in an enterprise environment, see the administrative documentation for the *SAS Intelligence Platform*. △

Before You Begin

Software Requirements

This guide explains how to set up a personal SAS Metadata Server and use a SAS Open Metadata Interface client in a Windows XP operating environment. To follow along, you need

- SAS 9.1.3 software
- SAS Integration Technologies software (shipped with SAS software)
- SAS Management Console software (SAS Management Console software must be installed from the *SAS Client-Side Components* CD-ROM that is shipped along with SAS software.)
- the appropriate software for the intended programming environment. The SAS Open Metadata Interface supports Java, Visual Basic, C++, and SAS clients.

Additional Reading

This guide introduces basic XML and XSL concepts. If you are not familiar with these languages, we recommend the following information sources:

- XML Web page: <http://www.w3.org/TR/1998/REC-xml-19980210>
- *Java and XML (O'Reilly Java Tools)*, by Brett McLaughlin and Mike Loukides (Cambridge, Mass: O'Reilly, 2000).
- *XSLT: Programmer's Reference*, by Michael Kay.

Example Scenario

As a statistician for a major pharmaceuticals company, Dr. Joe E. Doe maintains hundreds of SAS tables that contain the results of clinical trials for a new cancer inhibitor. He must report the results of these trials to the Food and Drug Administration in order to gain acceptance of the drug, and he wants to use the SAS Open Metadata Architecture to track his data. The SAS Open Metadata Architecture will provide

- a common model for storing the study metadata
- centralized access to this metadata
- the ability to reuse the metadata for other clinical trials projects
- ease of metadata transformation.

Tasks Overview

These are the steps for using the SAS Open Metadata Architecture:

- 1 Decide what information should be stored.
- 2 Select the appropriate metadata types.
- 3 Set up a SAS Metadata Server and a SAS Metadata Repository.
- 4 Add metadata objects.
- 5 Query metadata objects.
- 6 Update and delete metadata objects in the repository.