

- ▶ **Logging On to the Portal**
- ▶ **Navigating the Portal**
- ▶ **Searching the Portal**
- ▶ **Personalizing Your Portal**

SAS[®] Information Delivery Portal User's Guide

The SAS Information Delivery Portal is your personalized gateway to up-to-the-minute information. The portal gives you single-click access to the data, applications, and documents that you need to make decisions and do your job. It differs from other portals in that it has the power and flexibility of SAS behind it.

The portal gives you easy access to SAS reports, tables, databases, and stored processes. It lets you launch applications and view customized output. It gives you access to sites on the Web or your company intranet. It also lets you subscribe to publication or content channels that feed you information on a continual basis.

When you become an authorized portal user, the portal desktop is yours to modify at will—set up your own portal windows; set up your own lists of data, subscriptions, applications, or links; and organize them in the way that makes the most sense to you. You can change the desktop at anytime; the changes affect only your view of the portal.

This user's guide explains how to navigate the portal and make the most of its features. The contents are as follows:

- **Logging On to the Portal**
- **Navigating the Portal**
 - Viewing Channel Content
 - Viewing Documents
 - Viewing MDDBs
 - Viewing Packages (Including Report Results)
 - Running Reports (Stored Processes)
 - Viewing Tables
 - Viewing Warehouse Data
 - Viewing webEIS Documents
- **Searching the Portal**
- **Personalizing Your Portal**
 - Personalizing Your Desktop
 - Creating and Editing Personal Windows
 - Creating and Editing Role-Based Windows
 - Creating and Editing Personal Lists
 - Creating and Editing Role-Based Lists
 - Creating and Editing Personal Links
 - Creating and Editing Role-Based Links
 - Adding and Editing Personal Documents
 - Adding and Editing Role-Based Documents

- Adding and Editing Personal webEIS Documents
- Adding and Editing Role-Based webEIS Documents
- Adding and Editing Personal Widgets
- Adding and Editing Role-Based Widgets
- Adding and Editing Personal Applications
- Adding and Editing Role-Based Applications
- Managing Your Subscriptions
- Managing Your Subscriber Profiles
- Changing Your Password

Logging On to the Portal

When you first open the portal in your browser, your organization's Public Kiosk appears. This view of the portal is the same for all users. It provides access to content that is of general interest. In the following example, the Public Kiosk provides a list of channels and a list of Web sites. Your portal might appear differently if it has been customized to include your organization's logo or color scheme. You can access the content in the Public Kiosk by clicking any content item.

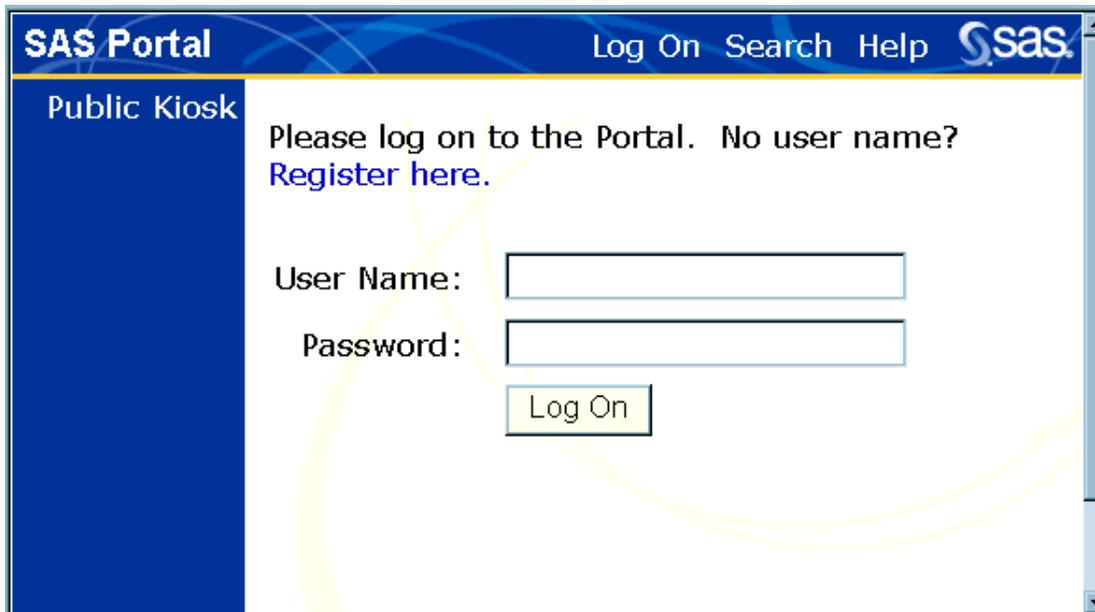


To log on to identify yourself and display your own personal view of the portal, follow these steps:

1. From the toolbar, click **Log On**.



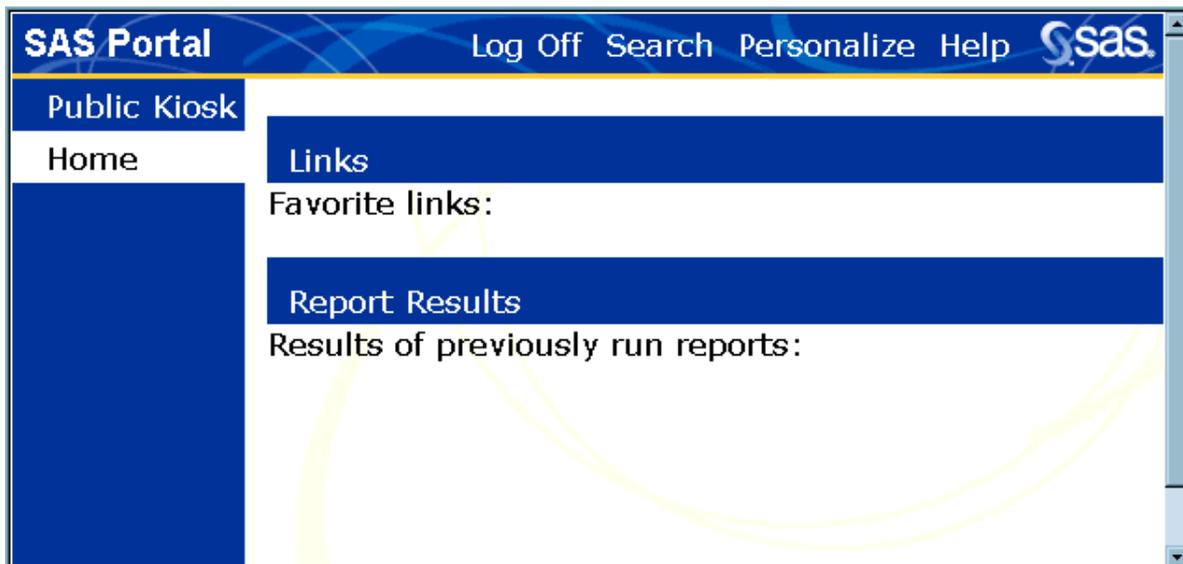
The log on screen appears:



2. On the log on screen, enter your **User Name** and **Password**. Then click **Log On**.

If you do not have a user name and password, click **Register here**. Enter the requested information on the form that appears. The minimum required fields, indicated by an asterisk (*), are your first name, last name, e-mail address, and a user name and password of your choice. After you make your entries, click **Register**.

3. Your personal view of the portal opens to the Home window:



You can now open a window of your choice and access any of the listed content items. You can also use the tools on the toolbar to conduct a search or to personalize your portal. See Navigating the Portal for more information about getting around the portal.

4. When you finish using your personal portal, click **Log Off** to end your session.

You can change your password at any time. See [Changing Your Password](#) for more information.

Navigating the Portal

After you log on, your personal view of the portal appears as follows. The diagram shows the elements of the portal that you can use for navigation.



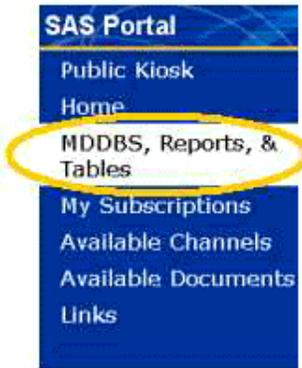
The **toolbar** gives you access to portal tools.

To use a tool, click one of the following tool names:

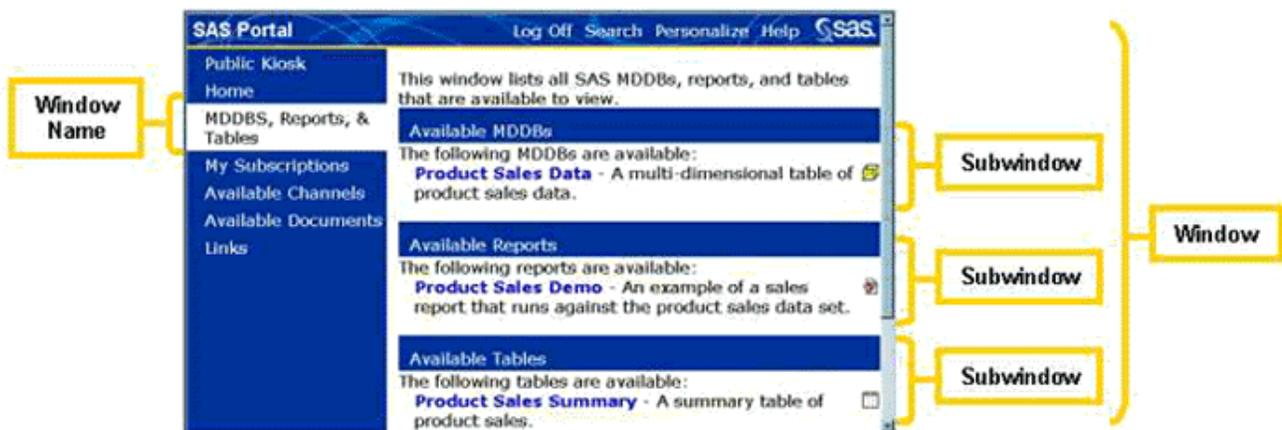
- Click **Log On** to identify yourself to the system and access your personal portal. Click **Log Off** to end your personal portal session. For details, see [Logging On to the Portal](#).
- Click **Search** to search for content items in the portal. For details, see [Searching the Portal](#).
- Click **Personalize** to modify your portal by adding new windows, lists, links, and content items or to manage your subscriptions and your subscription profiles. If you are authorized as a group owner, you can also make role-based changes that affect your entire group. For details, see [Personalizing Your Portal](#).
- Click **Help** to display this user's guide in a new browser window. To exit the user's guide, click  to close the window.

The **navigation column** lists the windows that are included in your portal.

To open a window, click the window name:



The window opens with the window name highlighted on the navigation column:



A window can contain

- one or more *subwindows*, which are windows within windows. In the previous example, the open window has three subwindows.
- one or more lists of specific content items. In the previous example, each subwindow contains a list, and each list contains one content item.
- a widget, which is a graphical user interface (GUI) component that displays information or accepts user input.

You can add your own windows to the portal using the Personalize tool.

Viewing Content

In the previous example, content items appear in lists within windows in the portal.

To open a content item, click its name.

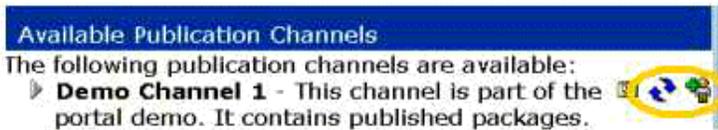
The content item opens in a new window:



To display the properties of a content item, click the properties icon opposite the name as follows:



Some content types have additional icons that you can click to perform an action. For example, publication channels have icons that allow you to refresh the channel content (🔄) and subscribe to the channel (📌) as follows:



To see the function of an icon, position the cursor over the icon without clicking a mouse button. A text box will appear that describes the function.

Content Types

The portal provides access to several different content types, each with its own properties icon.

- **Applications**

(📄) are Web-based computer programs that you can launch from the portal. When you click an application, it runs in a separate window on your screen. When you are finished using the application, click (✖) to close the application window and return to the portal.

- **Channels**

(📄) are conduits for publishing a particular category of information to users. The portal provides access to two types of channels: publication channels, which provide archived content published through the SAS Publishing Framework; and content channels, which provide syndicated content published by information providers. For more information, see [Viewing Channel Content](#). For information about subscribing to channels, see [Managing Your Subscriptions](#).

- **Documents**

() of a variety of types can be viewed in the portal. For more information, see [Viewing Documents](#).

- **Links**

() let you display pages on the Web or your local intranet. You can add your own links using the Personalize tool.

- **MDDBs**

() are SAS multidimensional databases. When viewing an MDDB, you can choose which rows, columns, data measures, and statistics to display. You can also drill down on any row or column to see additional detail. For more information, see [Viewing MDDBs](#).

- **Packages**

() are used to deliver the content of publication channels, which publish information using the SAS Publishing Framework. When you run a SAS report from the portal, the report results are also delivered to you in a package. For more information, see [Viewing Packages](#).

- **Reports**

() are stored SAS processes that you can use to run reports based on the most current data. For more information, see [Running Reports \(Stored Processes\)](#).

- **Tables**

() produced by SAS can be displayed with the columns that you request and in the order that you request them. You can also specify which rows of the table to display by entering a WHERE expression. For more information, see [Viewing Tables](#).

- **Warehouse views**

allow you to navigate data warehouses that were created using the SAS Intelligent Warehousing Solution. Warehouse views do not have a properties icon associated with them because they are navigation tools only. For more information, see [Viewing Warehouse Data](#).

- **webEIS Documents**

() provide point-and-click access to live data from enterprise databases that can be centrally located on SAS servers. The data is presented in the form of charts, tables, and images. Users can drill into the data, create subsets, highlight exceptions, and create new computations. For more information, see [Viewing webEIS Documents](#).

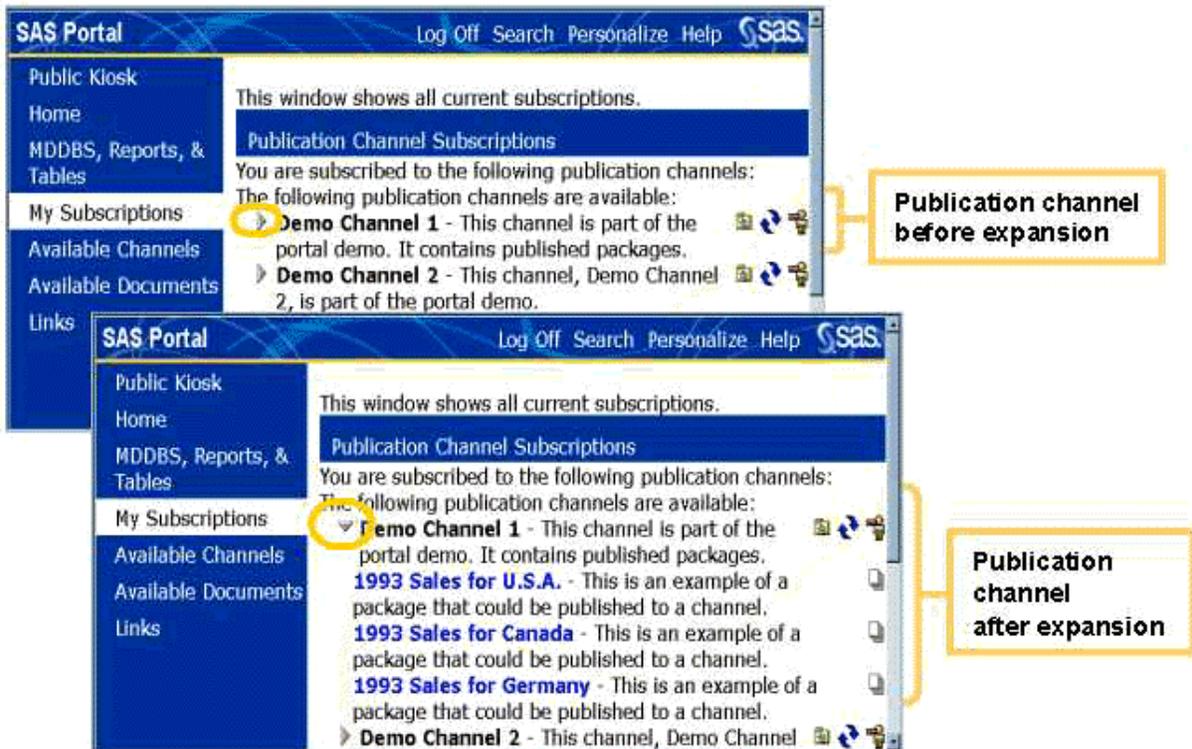
Your organization might have implemented additional types of content to be viewed through the portal.

Viewing Channel Content

The portal provides an easy method for you to view archived content that is published through SAS publication channels, as well as syndicated content that is published by information providers.

To view content published through a channel:

1. From the navigation column, select the window that contains a list of your subscriptions or a list of available channels. (If your portal does not include the necessary window, you can add it. For details, see Personalizing Your Desktop.)
2. Find the desired channel in a list. Channels are signified by the  icon.
3. Click  to expand the channel into a list of available content items, as shown in the following example:



4. From the expanded list, click the content item that you want to view.
5. If the content item is a Web link, your browser will access the appropriate URL and display the content in a separate window.

If the content item is a SAS package, the Portal Package Viewer will be displayed in a separate

window. In the viewer's navigation area, click the desired content item. For more information about the package viewer, see [Viewing Packages](#).

6. When you finish viewing the content item, click  to close the package viewer or the browser window.
7. You can also take the following actions:
 - Click  to refresh the content of a publication channel with the most up-to-date information.
 - Click  to collapse the list of content items.
 - On a list of available channels, click  to subscribe to a channel to which you are not already subscribed. The channel will be added to the appropriate subscription list on your portal.
 - Click  to unsubscribe from a channel. The channel will continue to appear on the list of available channels, but it will no longer appear on your subscription list.

Note: If you subscribe to a SAS publication channel, you can also receive content through other methods, such as e-mail messages and message queues. For more information, see [Managing Your Subscriptions](#) and [Managing Your Subscriber Profiles](#).

Viewing Documents

The portal allows you to view a document that has been stored in the Web server's file system.

To view a document:

1. From the navigation column, select the window that contains the document that you want to view. If your portal does not include the necessary window, you can add it. For details, see [Personalizing Your Desktop](#).
2. Find the desired document in a list. You can identify documents by the  icon.
3. Click the document name. A new browser window appears displaying the document you selected.
4. When you finish viewing the document, click  to close the window.

Viewing Document Properties

To view the properties of a document:

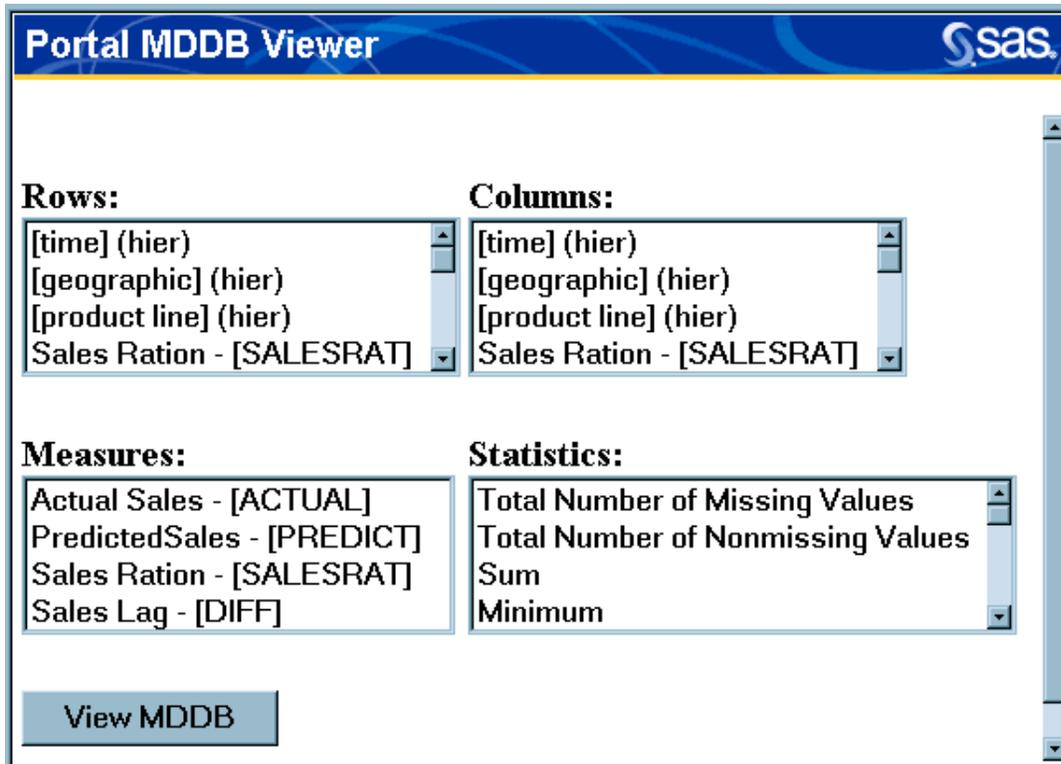
1. From the navigation column, select the window that contains the document whose properties you want to view.
 2. Find the desired document entry in a list. You can identify documents by the  icon.
 3. Click the  icon.
 4. The Portal Properties Viewer appears showing the following properties of the document:
 - Description
 - MIME Type
 - SAS Content Description
 - Format Characteristics
 - Label
 - Provider Type
 - Embedded Content
 - JSP
 - URL
 - Path
 - Publisher
 - Usage
 - Embedded XSL
 - Portal Reference
 5. When you finish viewing the properties, click  to close the Portal Properties Viewer.
-

Viewing MDDBs

The Portal MDDB Viewer allows you to view and navigate SAS multidimensional databases. The viewer lets you choose which rows, columns, data measures, and statistics to display. When viewing an MDDB, you can drill down on any row or column to see additional detail.

To view an MDDB:

1. From the navigation column, select the window that contains the MDDB you want to view. (If your portal does not include the necessary window, you can add it. For details, see Personalizing Your Desktop.)
2. Find the desired MDDB in a list. You can identify MDDBs by the  icon.
3. Click the MDDB name. The Filtering Criteria section of the Portal MDDB Viewer appears:



4. Highlight the MDDB elements that you want to include in the view as follows:

- **Rows and Columns:** Select the data items that are to appear in the rows and columns.
- **Measures and Statistics:** Select the measures and statistics that are to be applied to this data.

To select multiple items from a list, hold down the **CTRL** key while making your selections.

5. Click **View MDDB**. The Portal MDDB Viewer appears with the specified data:

Year	1993		1994	
	Actual Sales	Predicted Sales	Actual Sales	Predicted Sales
Product type	Sum	Sum	Sum	Sum
FURNITURE →	\$148,895.00	\$147,401.00	\$141,730.00	\$130,917.00
OFFICE →	\$220,582.00	\$212,810.00	\$219,130.00	\$215,167.00

6. Use the Portal MDDB Viewer as follows:

- To drill down and view more detailed data from the MDDB, click one of the underlined row or column labels.
- To move from page to page, click the arrows that appear under the view.
- To print the current page, select **File** ➔ **Print**.

7. When you finish viewing the MDDB, click  to close the Portal MDDB Viewer.

Viewing MDDB Properties

To view the properties of an MDDB:

1. From the navigation column, select the window that contains the MDDB whose properties you want to view.
2. Find the desired MDDB entry in a list. You can identify MDDBs by the  icon.
3. Click the  icon.
4. The Portal Properties Viewer appears showing the following properties of the MDDB:
 - description of the MDDB
 - MDDB member name, unique name, and logical name
 - MDDB Meta Base
 - list of the columns included in the MDDB
 - list of the MDDB cubes and subcubes
 - the portal reference, which is the URL the portal uses to refer to the MDDB.
5. When you finish viewing the properties, click  to close the Portal Properties Viewer.

Viewing Packages (Including Report Results)

The Portal Package Viewer allows you to view the contents of SAS packages. Packages are used to deliver publication channel content, which is content that is produced by the SAS Publishing Framework. For more information, see *Managing Your Subscriptions*.

Packages are also used to deliver the results of SAS reports that you run from the portal (see *Running Reports (Stored Processes)*). Report results are delivered in one of two ways:

- If you run the report using the **Wait for results** option, the results appear immediately in the Portal Package Viewer.
- If you run the report *without* the **Wait for results** option, the package appears in the list of report results on your portal.

To view the contents of a package:

1. From the navigation column, select the window that contains the package you want to view.
 - To view a package that was published through a publication channel, select a window that lists publication subscriptions or available publication channels. Then click ► to expand a channel listing to show specific packages, as shown in the following example:



- To view a package that contains the results of a report that you ran previously, select the window that contains report results. By default, the available report results are listed in the Report Results subwindow of your Home window, as shown in the following example. Use your browser's **Refresh** feature to update this list with the most current available results.



- If your portal does not include the necessary window, you can add the window to your portal. For details, see *Personalizing Your Desktop*.

- Find the desired package in a list. You can identify packages by the  icon.
- Click the package name. The Portal Package Viewer is displayed in a separate browser window:

The screenshot shows the 'Portal Package Viewer' window with the following details:

- Package:** 1993 Sales for U.S.A.
- Description:** This is an example of a package that could be published to a channel.
- Publisher:** Portal Demo
- Created on:** Sun Mar 12 12:53:26 EST 2000
- Expires on:** Fri Dec 31 18:59:59 EST 9999

The left navigation pane shows two items: '1993 Sales Report for U.S.A.' (with a folder icon) and 'Sales Report: Tabular' (with a document icon).

Note: If the package contains the results of a report that you ran from within the Portal, only the package name will be displayed in the viewer. No description, publisher, creation date and time, or expiration date and time will be displayed.

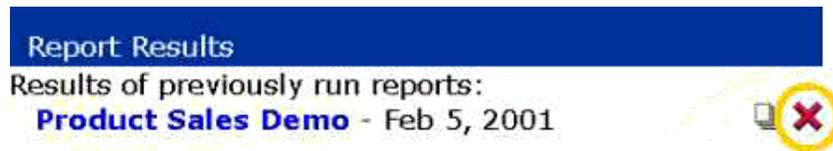
- In the navigation column of the viewer, click the desired entry in the package. The package contents (for example, report results) are displayed:

The screenshot shows the 'Portal Package Viewer' window displaying the report results for '1993 Sales Report for U.S.A.'. The report is presented as a table with the following data:

		Actual Sales
		Sum
Country	Division	
U.S.A.	CONSUMER	63450.00
	EDUCATION	57603.00

The left navigation pane shows two items: '1993 Sales Report for U.S.A.' (with a folder icon) and 'Sales Report: Tabular' (with a document icon). The 'Sales Report: Tabular' item is highlighted.

5. When you finish viewing the package, click  to close the browser window containing the Portal Package Viewer.
6. When you no longer need access to the results of a report that you ran previously, click  to remove the package from your portal, as shown in the following example:



Running Reports (Stored Processes)

The Portal Report Runner allows you to use SAS stored processes to run reports based on the most current data. A stored process is a SAS program that resides on a server and is available to be executed on a request basis. When you run a stored process from the portal, the Portal Report Runner displays the associated input form that allows you to customize the report contents. You can have the report runner display the report results dynamically, or you can choose to view the results later.

To run a report (stored process):

1. From the navigation column, select the window that contains the report you want to run. (If your portal does not include the necessary window, you can add the window to your portal. For details, see [Personalizing Your Desktop](#).)
2. Find the desired stored process report entry in a list. You can identify stored processes by the  icon.
3. Click the stored process name. The Portal Report Runner appears in a separate browser window that shows the input form for the report:

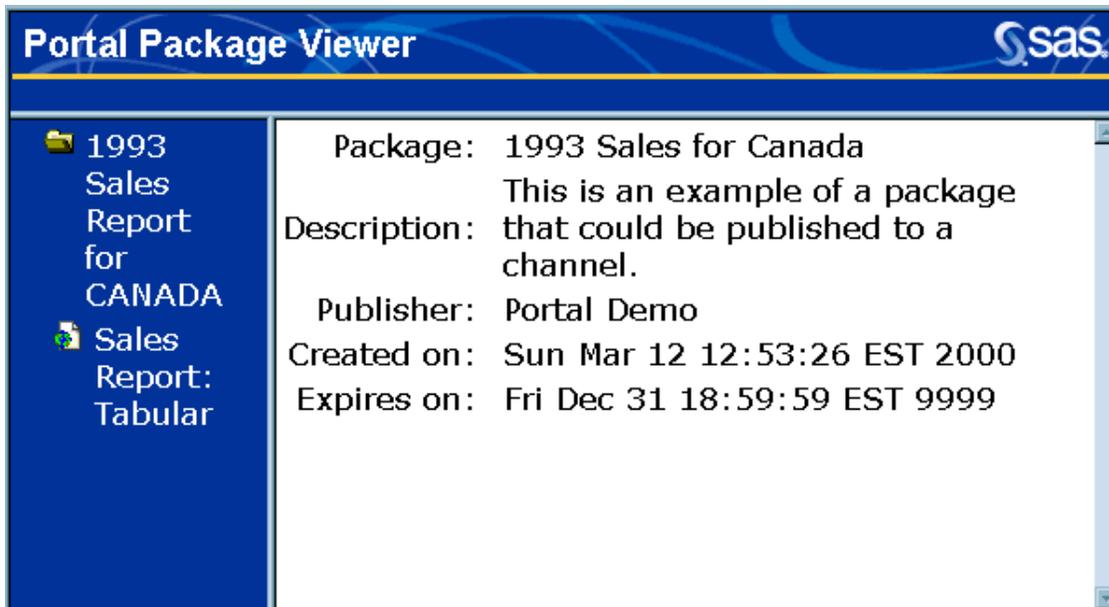
The screenshot shows the 'Portal Report Runner' interface for a 'Product Sales Demo'. It features a blue header with the SAS logo. Below the header, there is a dark blue bar with the text 'Product Sales Demo'. The main content area is white and contains the following elements: a 'Year' dropdown menu set to '1993', a 'Country' dropdown menu set to 'CANADA', a checked checkbox labeled 'Wait for results', and a yellow 'Submit Report' button.

4. On the input form:

1. Enter the desired report parameters using the fields provided.
2. If you want to see the report results now, leave the **Wait for results** check box selected. The report results will be displayed for immediate viewing, but they will not be saved in the portal.

If you want the report results to be saved in the portal for later viewing, click the **Wait for results** check box to remove the checkmark. If the report uses a large amount of data, this might be the best option because it allows you to perform other tasks while the report is running.

3. Click **Submit Report**.
5. If you choose the **Wait for results** option, the stored process runs and, when complete, displays the Portal Package Viewer in a separate browser window:



In the navigation column of the viewer, click on the desired report name to view the report results. When you finish, click  to close the browser window containing the Portal Package Viewer.

If you did not choose the **Wait for results** option, the message "Your report has been submitted" is displayed. When the stored process is complete, the report results will be placed in a package and listed on your Report Results window with a timestamp. To view the report results, click the package name. For more information, see Viewing Packages.

Viewing Report (Stored Process) Properties

To view the properties of a report:

1. From the navigation column, select the window that contains the report whose properties you want to view.
2. Find the desired stored process entry in a list. You can identify stored processes by the  icon.
3. Click the  icon.
4. The Portal Properties Viewer appears in a separate browser window that shows the following properties of the stored process:

Description

specifies a description of the report.

JSP

identifies the name and path of the Java Server Page that collects the needed input data.

File Name

identifies the name of the file that contains the SAS program (stored process) that runs the report.

Parameters

specifies a list of parameters that allow user input to control report content.

Portal Reference

specifies the URL the portal uses to refer to the stored process. You can use this URL to access the stored process when you are not in the SAS Information Delivery Portal.

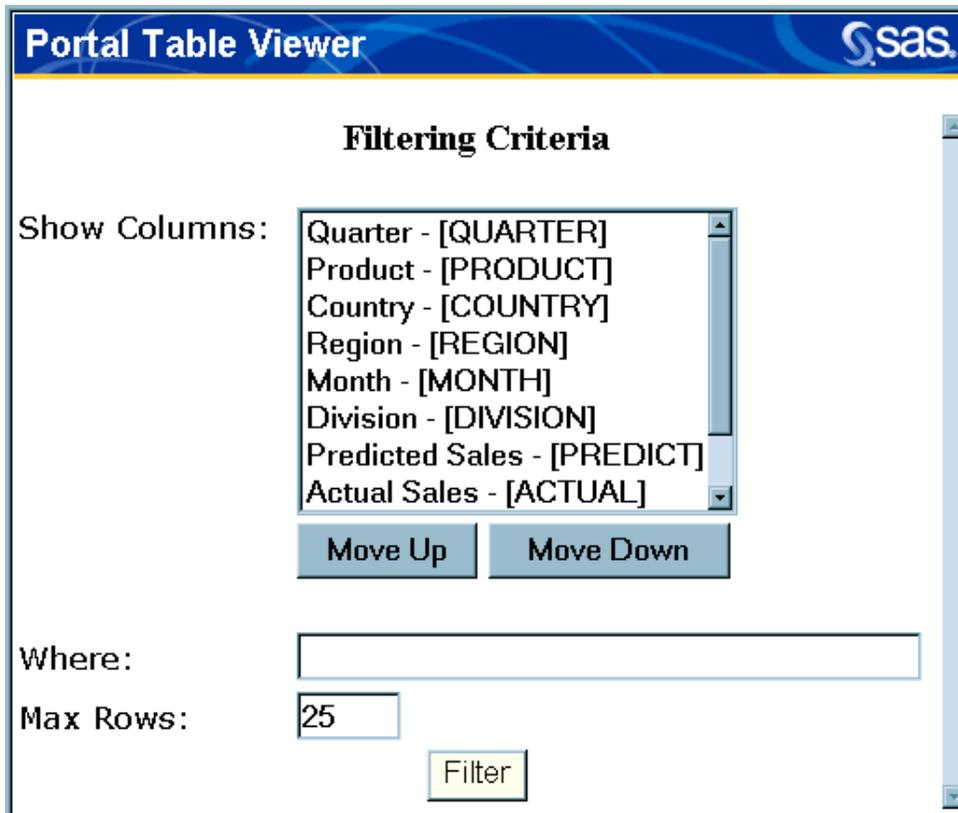
5. When you finish viewing the properties, click  to close the Portal Properties Viewer.

Viewing Tables

The SAS Information Delivery Portal Table Viewer allows you to view SAS tables through the portal. You can specify which table columns you want to display and the order in which you want them displayed. In addition, you can specify which rows of the table to display by entering a Standard Query Language (SQL) WHERE expression.

To view a table:

1. From the navigation column, select the window that contains the table you want to view. If your portal does not include the necessary window, you can add it. For details, see *Personalizing Your Desktop*.
2. Find the desired table in a list. You can identify tables by the  icon.
3. Click the table name. The Filtering Criteria section of the Portal Table Viewer appears:



4. From **Show Columns**, specify the order in which you want the columns to appear.

- If you highlight a column name and click **Move Up**, the column name moves to the top of the list. This means the column will be placed at the far left of the table.
- If you highlight a column name and click **Move Down**, the column name moves to the bottom of the list. This means the column will be placed at the far right of the table.

Note: A simple method for you to order the columns is to select the field you want to appear in the first column, and click **Move Down**. Select the field you want to appear in the second column, and click **Move Down**. Continue this process until you have moved the names of all the columns you want to include.

5. From **Show Columns**, press the **CTRL** key and highlight the names of the columns that you want to view. You must select at least one column.
6. In the **Where** field, you can enter an SQL expression to specify which rows of the table you want to view. To compose the statement, use the column names that appear in brackets in the **Show Columns** list. The following table shows some standard operators that you can use in SQL statements and some simple examples.

Note: If you want to view all of the table's rows, leave the **Where** field blank.

Operator	Definition	Example "Where" Expression
=	equal to	empnum = 3374
<>	not equal to	status <> fulltime
>	greater than	salary > 30000
<	less than	empnum < 2000
>=	greater than or equal to	empnum >= 3374
<=	less than or equal to	empnum <= 3374
AND	logical AND	state = 'NC' AND empnum >= 3374
BETWEEN...AND	between two values(inclusive)	empnum BETWEEN 3100 AND 3200
IN	matching any of the list of values	state IN ('NC','TX')
IS NOT NULL	is not a NULL VALUE	state IS NOT NULL
IS NULL	is a NULL VALUE	state IS NULL
LIKE	matching a character pattern	lastname LIKE 'M%' (Where lastname begins with 'M') position LIKE '%Programmer%'; (Where position title includes 'Programmer') deptcode LIKE '_RD'; (Where second and third characters of deptcode = 'RD')
NOT BETWEEN...AND	not between two values	empnum NOT BETWEEN 3100 AND 3200
NOT colname =	not equal to	NOT state = 'NC'
NOT colname >	not greater than	NOT salary > 30000
NOT LIKE	not matching a character pattern	NOT LIKE position '%Manager%' (Where position title does not include 'Manager')
OR	logical OR	state = 'NC' OR state = 'TX'

7. In the **Max Rows** field, enter the maximum of number of rows to be displayed on each page of the Portal Table Viewer.
8. Click **Filter** to display the table. The Portal Table Viewer appears showing
 - the table itself, with the rows and columns you selected. The rows appear in the same order that they occur in the original table.

Product Sales Summary

Country	Actual Sales	Year	Product	Division
CANADA	925.0	1993	SOFA	EDUCATION
CANADA	999.0	1993	SOFA	EDUCATION
CANADA	608.0	1993	SOFA	EDUCATION
CANADA	642.0	1993	SOFA	EDUCATION
CANADA	656.0	1993	SOFA	EDUCATION
CANADA	948.0	1993	SOFA	EDUCATION
CANADA	612.0	1993	SOFA	EDUCATION
CANADA	114.0	1993	SOFA	EDUCATION
CANADA	685.0	1993	SOFA	EDUCATION
CANADA	657.0	1993	SOFA	EDUCATION
CANADA	608.0	1993	SOFA	EDUCATION
CANADA	353.0	1993	SOFA	EDUCATION
CANADA	107.0	1994	SOFA	EDUCATION
CANADA	354.0	1994	SOFA	EDUCATION
CANADA	101.0	1994	SOFA	EDUCATION
CANADA	553.0	1994	SOFA	EDUCATION
CANADA	877.0	1994	SOFA	EDUCATION
CANADA	431.0	1994	SOFA	EDUCATION
CANADA	511.0	1994	SOFA	EDUCATION
CANADA	157.0	1994	SOFA	EDUCATION
CANADA	520.0	1994	SOFA	EDUCATION
CANADA	114.0	1994	SOFA	EDUCATION
CANADA	277.0	1994	SOFA	EDUCATION
CANADA	561.0	1994	SOFA	EDUCATION
CANADA	220.0	1993	BED	EDUCATION

< Previous Page [Next Page](#) >

Showing rows 1 - 25

- the filter criteria that were used to display the table. These are shown at the bottom of the Portal Table Viewer.

9. Use the Portal Table Viewer as follows:

- To move from page to page, click **Next Page** or **Previous Page**.
 - To print the currently displayed page, select **File** ➔ **Print**.
10. When you finish viewing the table, click  to close the Portal Table Viewer.

Viewing Table Properties

To view the properties of a table:

1. Open the SAS Information Delivery Portal. If the table you want is available from the Public Kiosk, go to step 2. If not, select **Log On** from the toolbar and enter your user name and password.
 2. From the navigation column at left, select the window that contains the table whose properties you want to view.
 3. Find the desired table entry in a list. You can identify tables by the  icon.
 4. Click the  icon.
 5. The Portal Properties Viewer appears showing the following properties of the table:
 - description of the table
 - table member name, unique name, and logical name
 - list of the columns included in the table
 - portal reference, which is the URL the portal uses to refer to the table.
 6. When you finish viewing the properties, click  to close the Portal Properties Viewer.
-

Viewing Warehouse Data

The portal allows you to view data that resides in data warehouses created by the SAS Intelligent Warehousing Solution.

To view warehouse data:

1. From the navigation column, select the window that contains warehouse data. (If your portal does not include the necessary window, you can add it. For details, see [Personalizing Your Desktop](#).)
2. Find the desired warehouse in a list.

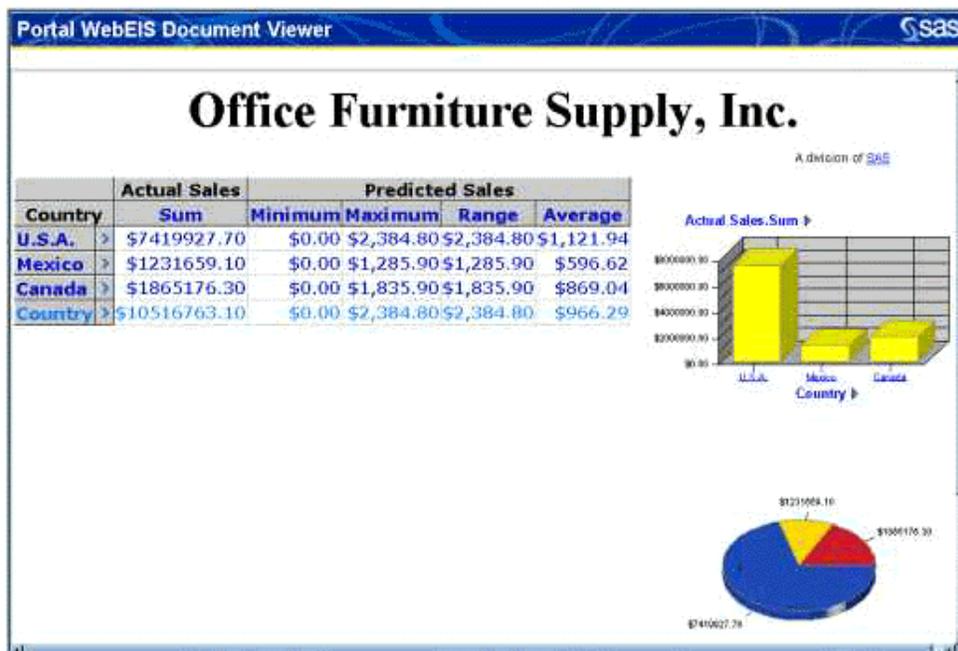
3. Click  to expand the warehouse into a more detailed list. Continue expanding until the desired content items are displayed. These might be tables, MDDBs, or other content types.
4. Click the content item you want to view. The content will be displayed in the appropriate viewer.
5. When you finish viewing the content item, click  to close the viewer.

Viewing webEIS™ Documents

The portal allows you to view webEIS documents that were added to the portal application's file system.

To view webEIS documents:

1. From the navigation column, select the window that contains the webEIS document you want to view. If your portal does not include the necessary window, you can add it. For details, see Personalizing Your Desktop.
2. Find the desired webEIS document in a list. You can identify webEIS documents by the  icon.
3. Click the name of the webEIS document you want to view. The content will be displayed in the webEIS Document Viewer. The appearance of the output will vary, but an example of what webEIS can generate follows:



You can drill down within the webEIS document to view more specific information about the data.

4. When you finish viewing the document, click  to close the viewer.

Viewing webEIS Document Properties

To view the properties of a webEIS document:

1. From the navigation column, select the window that contains the webEIS document whose properties you want to view.
2. Find the desired webEIS document in a list. You can identify webEIS documents by the  icon. If your portal does not contain the desired webEIS document, you can add it. For details, see [Adding and Editing Personal webEIS Documents](#)
3. Click the  icon.
4. The Portal Properties Viewer appears showing the following properties of the document:
 - Description
 - MIME Type
 - SAS Content Description
 - Format Characteristics
 - Label
 - Provider Type
 - Embedded Content
 - JSP
 - URL
 - Path
 - Publisher
 - Usage
 - Embedded XSL
 - Portal Reference

5. When you finish viewing the properties, click  to close the Portal Properties Viewer.

Searching the Portal

The Search tool helps you find specific content on the SAS Information Delivery Portal. You enter search criteria and specify the types of content you are interested in. The Search tool then examines the metadata (descriptive data) associated with all portal content that you are authorized to view, and it displays a list of content items whose metadata matches your criteria.

The following sections provide instructions for the two types of searches: basic and advanced.

Performing a Basic Search

To use the portal's basic search function:

1. Click **Search** on the toolbar. The following window appears:



2. In the **Containing** field, enter one or more words describing the content you are looking for. Leave a space between each word. Case does not matter; the search is not case-sensitive.

To perform a wildcard search (that is, search for all instances of one or more content types), enter an asterisk (*). Do *not* leave the field blank.

3. In the list of content types (for example, Applications or Content Channels), select the check boxes to include or exclude the types of content you are interested in.
4. Click **Find**. The search engine looks at all content items of the types you selected. It returns a list of all items whose metadata (which includes names, descriptions, key words, and other information) contains one or more of the words you entered.

5. To view one of the items found, click a content item in the list. You can also leave the search screen by choosing another task or opening another window.

If you want to perform a more refined search, use the advanced search function.

Performing an Advanced Search

To use the portal's advanced search function:

1. Click **Search** on the toolbar. The basic search window appears.
2. Click **Advanced Search**. The following window appears:

The screenshot shows the SAS Portal Advanced Search interface. At the top, there's a navigation bar with 'SAS Portal', 'Log On', 'Search', 'Help', and the SAS logo. A blue sidebar on the left is labeled 'Public Kiosk'. The main content area has a heading 'Find content that matches the specified criteria. If a word or phrase is not entered, content of that type will not be located.' Below this are four search sections: 'Find Applications', 'Find Archives', 'Find Publication Channels', and 'Find Content Channels'. Each section contains two 'containing' dropdown menus (one set to 'any of the words'), two 'in' dropdown menus (one set to 'any field'), and text input fields. The 'Find Archives' section also includes two 'containing name/value pair' fields with a slash separator. 'and' connectors are placed between the sections.

3. For each desired content type (for example, Applications, Archives, Publication Channels), enter up to two search statements.

Note: If you enter two statements for a given content type, the word "and" is assumed; that is, the criteria in *both* statements must be met in order for an entry to be found.

To enter a search statement:

- In the **containing** field, select one of the following:

- any of the words
 - all of the words
 - none of the words
 - the phrase
- In the adjacent field, enter the applicable word(s) or phrase. Leave a blank space between each word. Case does not matter; the search is not case-sensitive.
- To perform a wildcard search (that is, search for all instances of this content type), enter an asterisk (*). Do *not* leave the field blank.
- In the **in** field, select one of the following to indicate which metadata elements you want the search tool to examine:
- any field
 - description
 - keywords
 - name
 - publisher
- For searches that have the **containing name/value pair** field, enter the name you want to search for and the value that can be associated with that name. For example, if the name is REGION, you could search for the value `midwest`. If you entered this name/value pair, you would conduct a search for all midwest regions.
- Repeat this process for each content type you want to search. If you want to start the entry process over, click **Reset**.
4. When you finish entering your criteria, click **Find Now**. The search engine looks at all content items of the types you selected, and it returns a list of all items whose metadata meets your criteria.
 5. To view one of the items found, click a content item on the list. You can also leave the search screen by choosing another task or opening another window.

Personalizing Your Portal

When you open the SAS Information Delivery Portal, your organization's public portal appears. This view of the portal is the same for all users. When you choose the **Log On** tool and enter a valid user name and password, your own personal portal appears. Using the **Personalize** tool, you can modify this portal to meet your individual needs. The changes you make affect only your personal view of the portal.

The Personalize tool can also be used to make *role-based* changes. These changes affect the portals of an entire group of users. Role-based changes can be made only by the user who is designated as the *group owner* for the affected group.

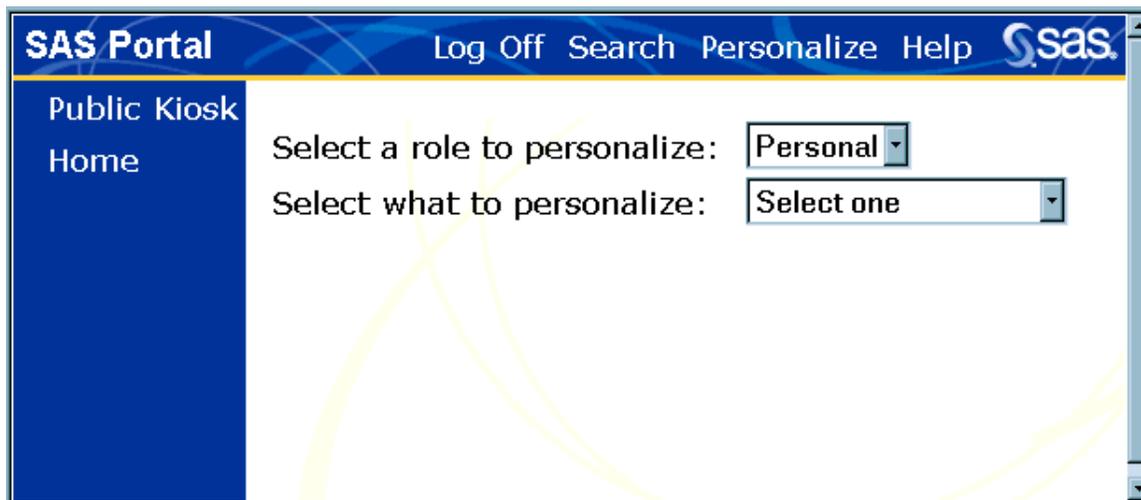
Note: Do not use the following characters in the Personalize windows: &, <, >, or ".

To use the Personalize tool:

1. Open the SAS Information Delivery Portal.
2. Log on with your user name and password. Your own personal portal appears. This is the portal you can customize to meet your needs.
3. Determine what changes you would like to make to your portal (or to your group's portals, if you are a group owner). Then click **Personalize** on the toolbar:



The Personalize window appears:



4. At the prompt **Select what to personalize**, select one of the following options from the drop-down list.
 - **Desktop** enables you to

- specify which public, personal, and role-based windows are to be included on your portal
- specify the order in which these windows appear in your desktop's navigation column
- create new personal windows and modify existing ones.

For details, see [Personalizing Your Desktop](#).

○ **Windows** enables you to

- create new personal windows and specify their contents
- modify or delete one of your existing personal windows
- create new role-based windows for your group if you are a group owner, and modify or delete existing ones.

For details, see [Creating and Editing Personal Windows](#) or [Creating and Editing Role-Based Windows](#). After creating a window, use the **Desktop** option to add the window to your desktop.

○ **Lists** enables you to

- create new personal lists of applications, channels, documents, links, MDDBs, reports, tables, data warehouse views, or webEIS documents
- modify or delete one of your existing personal lists
- create new role-based lists of applications, channels, documents, MDDBs, reports, subscriptions, tables, data warehouse views, or webEIS documents for your group if you are a group owner, and modify or delete existing ones.

For details, see [Creating and Editing Personal Lists](#) or [Creating and Editing Role-Based Lists](#). After creating a list, use the **Windows** option to add the list to a window so that it will appear on your desktop.

○ **Links** enables you to

- create new links to internal or external Web addresses
- modify or delete one of your existing personal links
- create new role-based links for your group if you are a group owner, and modify or delete existing ones.

For details, see [Creating and Editing Personal Links](#) or [Creating and Editing Role-Based Links](#). After creating a link, use the **Lists** option to add the link to a list so that it will appear

on your desktop.

- **Documents** enables you to edit information about your personal documents, or edit information about role-based documents if you are a group owner.

Note: Because of potential security issues, the Personalization feature does not allow portal users to add documents to the portal. For more information, see Adding and Editing Personal Documents or Editing and Editing Role-Based Documents.

- **webEIS Documents** enables you to

- add a webEIS document to your portal
- add a role-based webEIS document for your group if you are a group owner.

For details, see Adding and Editing Personal webEIS Documents or Adding and Editing Role-Based webEIS Documents. After adding a webEIS document, use the **Windows** option to add the webEIS document to a window so that it will appear on your desktop.

- **Widgets** enables you to

- add widgets to your portal
- add role-based widgets for your group if you are a group owner.

For details, see Adding and Editing Personal Widgets or Adding and Editing Role-Based Widgets. After adding a widget, use the **Windows** option to add the widget to a window so that it will appear on your desktop.

- **Applications** enables you to

- add applications to your portal
- add role-based applications for your group if you are a group owner.

For details, see Adding and Editing Personal Applications or Adding and Editing Role-Based Applications. After adding an application, use the **Windows** option to add the application to a window so that it will appear on your desktop.

- **Subscriptions** enables you to subscribe to (or unsubscribe from) a content channel or a publication channel. For details, see Managing Your Subscriptions.

- **Subscription Profiles** enables you to set up a new subscription profile to use when subscribing to publication channels. You can also modify or delete one of your existing subscriber profiles. For details, see Managing Your Subscriber Profiles.

- **Account** enables you to change your portal password. For details, see Changing Your Password.

5. When you select one of the previous options, the personalize screen refreshes and displays a set of controls, called a control panel, for performing the requested task. To proceed, follow the instructions in the links previously mentioned.
-

Personalizing Your Desktop

The Personalize Desktop feature of the SAS Information Delivery Portal allows you to

- specify the public, personal, and role-based windows to be included on your portal desktop
- specify the order in which these windows appear in your desktop's navigation column
- edit your personal windows and create new personal windows.

To use the Personalize Desktop feature:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select what to personalize**, select **Desktop** from the drop-down list. The Desktop control panel appears with the following sections:
 - **Manage personal desktop** shows all the windows that are currently included on your desktop. The windows appear in the same order that they appear in your desktop's navigation column. For any window on this list, you can
 - Click  or  to reposition the window on this list and in the navigation column.
 - Click  to remove the window from your desktop.
 - Click  to edit the window. This function is available only for personal windows. The Personal Windows control panel appears when you select this function. For details on using this panel, see [Creating and Editing Personal Windows](#).
 - **Add an existing window** contains a drop-down list of all the public and role-based windows you are authorized to access, as well as all of your own personal windows. To add one of these windows to your desktop, highlight it on the list and click . The window will appear on the Manage personal desktop list above and in the navigation column of your desktop.
 - **Add a new window** allows you to create a new personal window and add it to your desktop as follows:

1. Click a radio button to indicate the type of window you want to create.
 2. Click .
 3. The Personal Windows control panel appears. For details on using this panel, see [Creating and Editing Personal Windows](#).
 4. When you finish, the new window will appear on the Manage personal desktop list above and in the navigation column of your desktop.
3. When you finish personalizing your desktop, you can proceed by choosing another Personalize function, choosing another task, or opening another window.

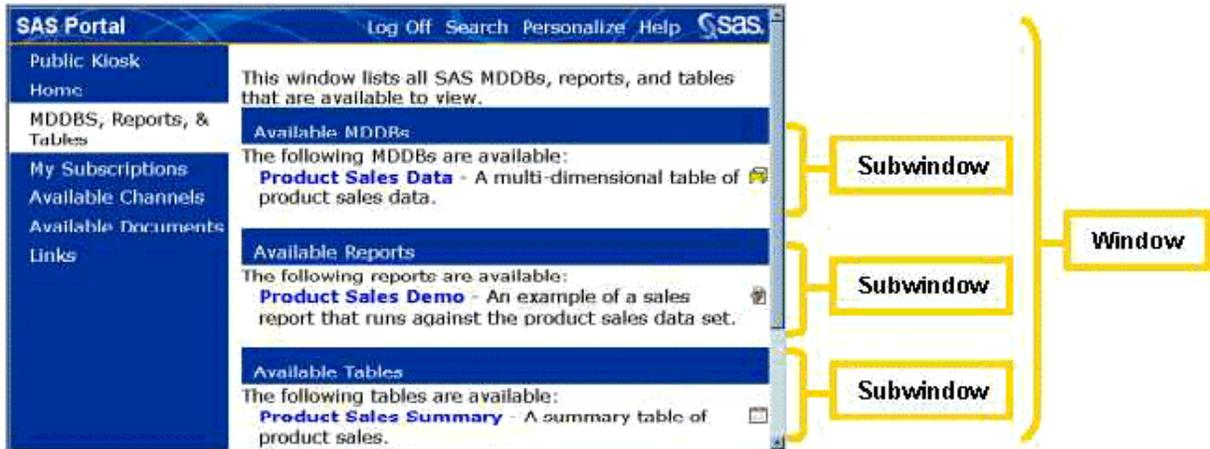
Creating and Editing Personal Windows

The SAS Information Delivery Portal allows you to create and edit your own personal windows that contain items of interest to you. You can create three different types of windows:

- A window that contains one or more lists, as shown in this example:



- A window that contains one or more subwindows, as shown in this example:



- A window that is defined by a widget, which is a graphical user interface (GUI) component that displays information or accepts user input, as shown in this example:



Creating a New Personal Window

To create a new personal window:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user

name and password, and click **Personalize** on the toolbar. The Personalize window appears.

2. At the prompt **Select a role to personalize**, choose **Personal** from the drop-down list.
3. At the prompt **Select what to personalize**, choose **Windows** from the drop-down list. The Personal Windows control panel appears showing all the windows you have previously created.
4. Under **Add a new personal window**, click a radio button to indicate the type of window you want to create. Then click . The New Personal Window control panel appears.
5. Fill in the fields as follows:

Title

Enter a title for the window. This title will appear in the navigation column (or at the top of the subwindow, if applicable). It will also identify the window when you are using the Personalize tool.

Message

Enter text that is to appear at the top of the window. This field is optional.

Description

Enter a short description of the window. This text will appear with the name when you are using the Personalize tool. When the window is displayed in the portal, the description will *not* appear.

Keywords

Enter key words to help you find this window when you use the Search tool. This field is optional.

6. Click **Next**.
7. You can create three different types of windows:
 - If you are creating a window that is defined by a widget (a graphical user interface (GUI) component that displays information or accepts user input), select the appropriate widget from the drop-down list.
 - If you are creating a window that is to contain one or more lists:
 1. A list box is displayed showing the lists that are available to include in your window.

Note: If you need a list that is not available, you can create a new one (see Creating and Editing Personal Lists).
 2. While holding down the **CTRL** key, highlight each list that you want to include in the window.
 3. When you have highlighted all the desired lists, click **Create Window**. The Personal

Windows control panel reappears showing the new window you have created.

- If you are creating a window that is to contain one or more subwindows:
 1. A list box is displayed showing the available windows.
 2. While holding down the **CTRL** key, highlight each window that is to be a subwindow of your new window.
 3. When you have highlighted all the desired subwindows, click **Create Window**. The Personal Windows control panel reappears showing the new window you have created.
- 8. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: Before you can access the newly created window, you must add it to your desktop's navigation column. For instructions, see *Personalizing Your Desktop*.

Editing or Deleting Personal Windows

To edit or delete an existing personal window:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal** from the drop-down list.
3. At the prompt **Select what to personalize**, choose **Windows** from the drop-down list. The Personal Windows control panel appears showing all the windows you have previously created.
4. Under **Manage personal windows**, find the window you want to edit or delete. Then click  to delete the window or  to edit the window. If you click , the window disappears immediately, and you are finished. If you click , the Update Personal Window control panel appears.
5. Update the **Title**, **Message**, **Description**, and **Keywords** fields as necessary.
6. Click **Next**.
7. You can edit all three types of windows:
 - If the window you are editing is defined by a widget, select the appropriate widget from the drop-down list.
 - If the window you are editing contains one or more lists:
 1. A list box is displayed showing the lists that are available to include in your window. The lists that are currently included in your personal window will already be

highlighted.

2. To keep the existing lists and add new lists, hold down the **CTRL** key and highlight each list you want to add. To replace the current lists, make your first selection without holding down the **CTRL** key; then hold down **CTRL** while you make any additional selections.
 3. When you have highlighted all the desired lists, click **Create Window**. The Personal Windows control panel reappears.
- If the window you are editing contains one or more subwindows:
1. A list box is displayed showing the windows that are available to include in your window. The windows that are already subwindows will be highlighted.
 2. To keep the existing subwindows and add new ones, hold down the **CTRL** key and highlight each window you want to add. To replace the subwindows, make your first selection without holding down the **CTRL** key; then hold down **CTRL** while you make any additional selections.
 3. When you have highlighted all the subwindows, click **Create Window**. The Personal Windows control panel reappears.
8. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Creating and Editing Role-Based Windows

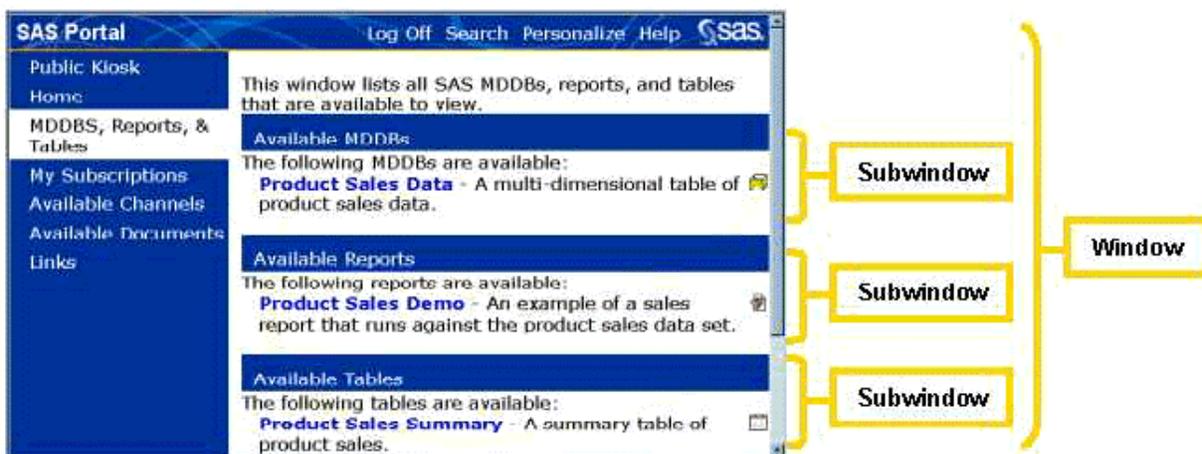
Role-based windows are windows that are available only to the users assigned to a particular group. If you have authorization as the owner of a group, you can create and edit role-based windows for that group. After the group owner has created a role-based window, users in the group can add it to their desktops.

You can create three different types of role-based windows:

- A window that contains one or more lists, as shown in this example:



- A window that contains one or more subwindows, as shown in this example:



- A window that is defined by a widget, which is a graphical user interface (GUI) component that displays information or accepts user input, as shown in this example:

The screenshot shows the SAS Portal interface. At the top, there is a navigation bar with 'SAS Portal', 'Log Off', 'Search', 'Personalize', and 'Help' buttons, along with the SAS logo. Below this is a sidebar with navigation links: 'Public Kiosk', 'Home', 'MDDBS, Reports, & Tables', 'My Subscriptions', 'Available Channels', 'Available WebEIS Documents', and 'Links'. The main content area displays a 'Sample Widget' which is a table with the following data:

Country	Product	Sales
CANADA	BED	25885.0
	CHAIR	25777.0
	DESK	26512.0
	SOFA	23415.0
	TABLE	24381.0
GERMANY	BED	22616.0
	CHAIR	23960.0
	DESK	23344.0
	SOFA	24332.0
	TABLE	24342.0
U.S.A.	BED	24073.0
	CHAIR	25523.0
	DESK	23209.0
	SOFA	21409.0
	TABLE	22082.0

Yellow annotations highlight the 'Sample Widget' table and a larger 'Window' area on the right side of the interface.

Creating a New Role-Based Window

To create a new role-based window:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose windows you are updating.
3. At the prompt **Select what to personalize**, choose **Windows** from the drop-down list. The portal Windows control panel appears, including a list of all the role-based windows that currently exist for the group.
4. Under **Add a new <your group's name> window**, click a radio button to indicate the type of window you want to create. Then click **+**. Fields appear to define the new window.
5. Fill in the fields as follows:

Title

Enter a title for the window. This title will appear in the navigation column (or at the top of the subwindow, if applicable). It will also identify the window when you are using the Personalize tool.

Message

Enter text that is to appear at the top of the window. This field is optional.

Description

Enter a short description of the window. This text will appear with the title when you use the Personalize tool. (When the window is displayed in the portal, the description will *not* appear.)

Keywords

Enter key words that will help group members find this window when they use the Search tool. This field is optional.

6. Click **Next**.
7. You can create three different types of windows:
 - If you are creating a window that is defined by a widget, choose the appropriate widget from the drop-down list.
 - If you are creating a window that is to contain one or more lists:
 1. A list box is displayed showing the lists that are available to include in the window.
Note: If you need a list that is not available, you can create a new one (see [Creating and Editing Role-Based Lists](#)).
 2. While holding down the **CTRL** key, highlight each list that you want to include in the window.
 3. When you have highlighted all the desired lists, click **Create Window**. The portal Windows control panel reappears showing the new window you have created.
 - If you are creating a window that is to contain one or more subwindows:
 1. A list box is displayed showing the available windows.
 2. While holding down the **CTRL** key, highlight each window that is to be a subwindow of the new window.
 3. When you have highlighted all the desired subwindows, click **Create Window**. The portal Windows control panel reappears showing the new window you have created.
8. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

After the group owner has created a role-based window, users in the group can add the window to the navigation columns of their desktops. For instructions, see [Personalizing Your Desktop](#).

Editing or Deleting Role-Based Windows

If you have authorization as group owner, you can edit or delete an existing role-based window for the group.

To edit or delete a role-based window:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose windows you are updating.
3. At the prompt **Select what to personalize**, choose **Windows** from the drop-down list. The portal Windows control panel appears, including a list of all the role-based windows that currently exist for the group.
4. Under **Manage <your group's name> personal windows**, find the window you want to edit or delete. Then click  to delete the window or  to edit the window. If you click , the window disappears immediately, and you are finished. If you click , the Update Window control panel appears.
5. Update the **Title**, **Message**, **Description**, and **Keywords** fields as necessary.
6. Click **Next**.
7. You can edit all three types of windows:
 - If the window you are editing is defined by a widget, select the appropriate widget from the drop-down list.
 - If the window you are editing contains one or more lists:
 1. A list box is displayed showing the lists that are available to include in the window. The lists that are currently in your window will already be highlighted.
 2. To keep the existing lists and add new lists, hold down the **CTRL** key and highlight each list you want to add. To replace the current lists, make your first selection without holding down the **CTRL** key; then hold down **CTRL** while you make any additional selections.
 3. When you have highlighted all the desired lists, click **Create Window**. The portal Windows control panel reappears.
 - If the window you are editing contains one or more subwindows:
 1. A list box is displayed showing the available windows. The windows that are already subwindows will be highlighted.

2. To keep the existing subwindows and add new ones, hold down the **CTRL** key and highlight each window you want to add. To replace the subwindows, make your first selection without holding down the **CTRL** key; then hold down **CTRL** while you make any additional selections.
 3. When you have highlighted all the subwindows, click **Create Window**. The portal Windows control panel reappears.
8. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Creating and Editing Personal Lists

The SAS Information Delivery Portal allows you to create and edit your own personal lists of channels, documents, links, MDDBs, reports, subscriptions, tables, data warehouse views, applications, or webEIS documents. You can then display these lists in windows in the portal.

For example, the following Links window contains two lists of links:



Creating a Personal List

To create a new personal list:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal** from the drop-down list.
3. At the prompt **Select what to personalize**, choose **Lists** from the drop-down list. The Personal Lists control panel appears showing all the lists you have previously created.

4. Under **Add a new personal list**, click a radio button to indicate the type of list you want to create. Then click **+** to add a new list. The New Personal List control panel appears.

5. Fill in the fields as follows:

Name

Enter a name, which will identify the list when you use the Personalize tool. When the list is displayed in the portal, the name will *not* appear with the list.

Message

Enter the text that is to appear at the top of the list when it is displayed in a portal window.

Description

Enter a short description of the list. This text will appear with the name when you use the Personalize tool. When the list is displayed in the portal, the description will *not* appear with the list.

Keywords

Enter key words that will help you find this list when using the search tool. This field is optional.

6. Click **Next**. A list box is displayed that shows the items that are available to include on your list. For example, if you are creating a list of links, all of the available links are displayed.

Note: If you are creating a list of links and you need a link that is not available, you can create a new one. For more information, see *Creating and Editing Personal Links*. You can also add documents, webEIS documents, widgets, and applications.

7. While holding down the **CTRL** key, highlight each item that you want to include on your list.

8. When you have highlighted all the desired items, click **Create List**. The Personal List window reappears showing the new list. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To display the new list, you must now put it into a personal window. For instructions, see *Creating and Editing Personal Windows*.

Editing or Deleting Personal Lists

To edit or delete an existing personal list:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal**.

3. At the prompt **Select what to personalize**, select **Lists** from the drop-down list. The Personal Lists control panel appears.
 4. Under **Manage personal lists**, find the list you want to edit or delete. Then click  to delete the list or  to edit the list. If you click , the list disappears immediately, and you are finished. If you click , the Update Personal List control panel appears.
 5. Update the **Name**, **Message**, **Description**, and **Keywords** fields as necessary.
 6. Click **Next**. A list is displayed that shows the items that are available to include on your list. The items that are currently on your list will already be highlighted.
 7. To keep the existing items and add new items, hold down the **CTRL** key and highlight each item you want to add. To replace the current items, make your first selection without holding down the **CTRL** key; then hold down **CTRL** while you make any additional selections.
 8. When you have highlighted all the desired items, click **Create List**. The Personal Lists control panel reappears. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.
-

Creating and Editing Role-Based Lists

Role-based lists are lists that are available only to the users who are assigned to a particular group. If you have authorization as the owner of a group, you can create and edit role-based lists for that group. After you create a role-based list, you can add it to one or more *role-based windows* that have been defined for the group. In addition, users in the group can add the role-based list to their own personal windows.

Creating a Role-Based List

To create a new role-based list:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose lists you are updating.
3. At the prompt **Select what to personalize**, choose **Lists** from the drop-down list. The Lists control panel appears, showing all the role-based lists that have been created for the group.
4. Under **Add a new <your group's name> list**, click a radio button to indicate the type of list you want to create. Then click  to add a new list. The New List control panel appears.

5. Fill in the fields as follows:

Name

Enter a name, which will identify the list when you are using the Personalize tool. When the list is displayed in the portal, the name will *not* appear with the list.

Message

Enter the text that is to appear at the top of the list when it is displayed in a portal window.

Description

Enter a short description of the list. This text will appear with the name when you are using the Personalize tool. When the list is displayed in the portal, the description will *not* appear with the list.

Keywords

Enter key words that will help group members find this list when they use the Search tool. This field is optional.

6. Click **Next**. A list box is displayed that shows the items that are available to include on the list. For example, if you are creating a list of links, all of the available links are displayed.

Note: If you are creating a list of links and you need a link that is not available, you can create a new one (see [Creating and Editing Role-Based Links](#)). You can also add new role-based documents, webEIS documents, widgets, and applications.

7. While holding down the **CTRL** key, highlight each item that you want to include in the list.
8. When you have highlighted all the desired items, click **Create List**. The Lists control panel reappears showing the new list. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

To make use of the list, you might want to add it to a role-based window. For instructions, see [Creating and Editing Role-Based Windows](#). In addition, users in the group will be able to add the list to their own personal windows.

Editing or Deleting Role-Based Lists

If you have authorization as group owner, you can edit or delete an existing role-based list for the group.

To edit or delete an existing role-based list:

1. Open the Personalize window. At the prompt **Select what to personalize**, choose **Lists** from the drop-down list. The Lists control panel appears.

2. At the prompt **Select a role to personalize**, choose the group whose lists you are updating.
3. Under **Manage <your group's name> lists**, find the list you want to edit or delete. Then click  to delete the list or  to edit the list. If you click , the list disappears immediately, and you are finished. If you click , the Update List control panel appears.
4. Update the **Name**, **Message**, **Description**, and **Keywords** fields as necessary.
5. Click **Next**. A list box is displayed that shows the items that are available to include on the list. The items that are currently on the list will already be highlighted.
6. To keep the existing items and add new items, hold down the **CTRL** key and highlight each item you want to add. To replace the current items, make your first selection without holding down the **CTRL** key; then hold down **CTRL** while you make any additional selections.
7. When you have highlighted all the desired items, click **Update List**. The Lists control panel reappears. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Creating and Editing Personal Links

The SAS Information Delivery Portal allows you to create and edit your own personal links to sites on the Web or your local intranet. You can then include these links on lists and display them in windows in the portal. In the following example, the Links window contains two lists of links.



Creating a Personal Link

To create a new personal link:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal**.
3. At the prompt **Select what to personalize**, choose **Links** from the drop-down list. The Personal Links control panel appears showing the existing links.
4. Opposite **Add a new personal link**, click  to add a link. The New Personal Link control panel appears.
5. Fill in the fields as follows:

Name

Enter a name for the link. This name will identify the link when it is displayed in the portal.

Url

Enter the complete URL for the link. To ensure accuracy, you might want to use your browser to find the desired site and then copy the URL from the browser's address line.

Description

Enter a short description for the link. The description will appear after the name when the link is displayed on a list.

Keywords

Enter key words that will help you find this link when you use the Search tool. This field is optional.

6. Click **Create Link**. The Personal Links control panel reappears showing the new link. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To display the new link, you must now add it to a list. For instructions, see [Creating and Editing Personal Lists](#).

Editing or Deleting Personal Links

To edit or delete an existing personal link:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal**.
3. At the prompt **Select what to personalize**, choose **Links** from the drop-down list. The Personal Links control panel appears.

4. Under **Manage personal links**, find the link you want to edit or delete. Then click  to delete the link or  to edit the link. If you click , the link disappears immediately, and you are finished. If you click , the Update Personal Link control panel appears.
5. Update the **Name**, **Url**, **Description**, and **Keywords** fields as necessary.
6. Click **Update Link**. The Personal Links control panel reappears.

Creating and Editing Role-Based Links

Role-based links are links that are available only to the users assigned to a particular group. If you have authorization as the owner of a group, you can create and edit role-based links for that group. After you create a role-based link, you can add it to one or more *role-based lists* that have been defined for the group. In addition, users in the group can add the role-based link to their own personal lists.

Creating a Role-Based Link

To create a new role-based link:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose links you are updating.
3. At the prompt **Select what to personalize**, choose **Links** from the drop-down list. The Links control panel appears showing the group's role-based links.
4. Opposite **Add a new <your group's name> link**, click  to add a new link. The New Link control panel appears.
5. Fill in the fields as follows:

Name

Enter a name for the link. This name will identify the link when it is displayed in the portal.

Url

Enter the complete URL for the link. To ensure accuracy, you might want to use your browser to find the desired site, and then copy the URL from the browser's address line.

Description

Enter a short description for the link. The description will appear after the name when the link is displayed on a list.

Keywords

Enter key words that will help group members find this link when using the search tool. This field is optional.

6. Click **Create Link**. The Links control panel reappears, showing the new link you have created. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

To make use of the link, you might want to add it to a role-based list. For instructions, see [Creating and Editing Role-Based Lists](#). In addition, the users in the group will be able to add the link to their own personal lists.

Editing or Deleting Role-Based Links

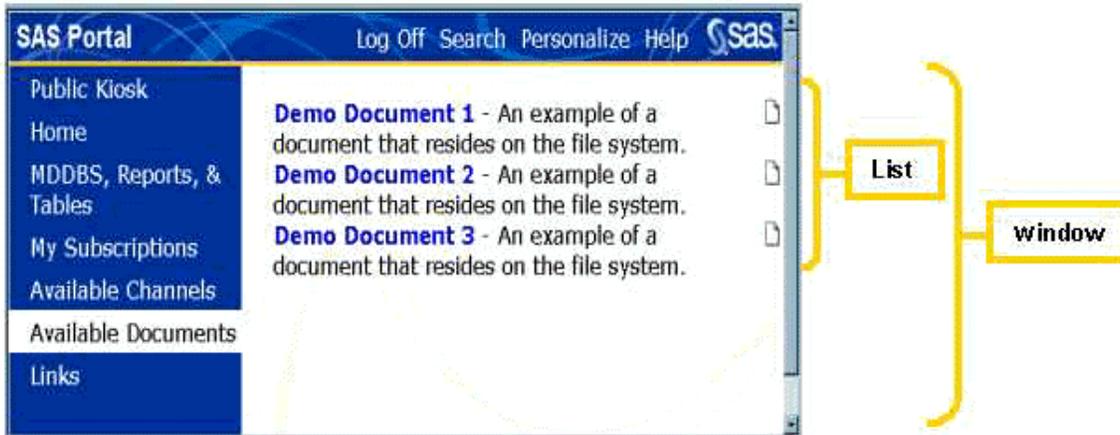
If you have authorization as group owner, you can edit or delete an existing role-based link for the group.

To edit or delete an existing role-based link:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose links you are updating.
3. At the prompt **Select what to personalize**, choose **Links** from the drop-down list. The Links control panel appears.
4. Under **Manage <your group's name> links**, find the link you want to edit or delete. Then click  to delete the link or  to edit the link. If you click , the link disappears immediately, and you are finished. If you click , the Update Link control panel appears.
5. Update the **Name**, **URL**, **Description**, and **Keywords** fields as necessary.
6. Click **Create Link**. The Links control panel reappears.

Adding and Editing Personal Documents

The SAS Information Delivery Portal allows you to view documents that have been made available for your personal access. You can include these documents in lists and display them in windows in the portal. In the following example, the Available Documents window shows a list of sample documents.



Adding a Personal Document

Because of potential security issues, the Personalization feature does not allow portal users to add documents to the portal. Documents can be added by a user who has administrative privileges; or they can be added through a custom interface, if one has been developed for your site. For more information, refer to the Implementation and Administration Guide for the SAS Information Delivery Portal.

Once a personal document has been added, you can place it on a personal list. For instructions, see Creating and Editing Personal Lists. For more information on viewing documents, see Viewing Documents.

Editing or Deleting Personal Documents

If a document has been added for your personal use, you can use the Personalize feature to edit the document's name, description, and keywords, or to delete the document from the portal.

To edit or delete an existing personal document:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal**.
3. At the prompt **Select what to personalize**, choose **Documents** from the drop-down list. The Personal Documents control panel appears.
4. Under **Manage personal documents**, find the document you want to edit or delete. Then click  to delete the document or  to edit the document. If you click , the document disappears immediately, and you are finished. If you click , the Update Personal Document control panel appears.
5. Update the following fields as necessary:

Name

Enter a name for the document. This name will identify the document when it is displayed in the portal.

Description

Enter a short description for the document. The description will appear after the name when the document is displayed on a list.

Keywords

Enter key words that will help you find this document when you use the Search tool. This field is optional.

6. Click **Update Document**. The Personal Documents control panel reappears.

Adding and Editing Role-Based Documents

Role-based documents are documents that are available only to the users assigned to a particular group. If a role-based document has been made available for a group to access, the group owner can add the document to one or more role-based lists. Users in the group can also add the role-based document to their own personal lists. In addition, the group owner can use the Personalize feature to edit the document's name, description, and keywords, or to delete the document from the portal.

Adding a Role-Based Document

Because of potential security issues, the Personalization feature does not allow portal users to add documents to the portal. Documents can be added by a user who has administrative privileges; or they can be added through a custom interface, if one has been developed for your site. For more information, refer to the Implementation and Administration Guide for the SAS Information Delivery Portal.

Once a role-based document has been added to the portal, the group owner can add it to a role-based list. For instructions, see *Creating and Editing Role-Based Lists*. In addition, the users in the group will be able to add the document to their own personal lists.

For more information on viewing documents, see *Viewing Documents*.

Editing or Deleting Role-Based Documents

If a document has been added for your group, and if you have authorization as a group owner, you can use the Personalize feature to edit the document's name, description, and keywords, or to delete the document from the portal.

To edit or delete an existing role-based document:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose documents you are updating.
3. At the prompt **Select what to personalize**, choose **Documents** from the drop-down list. The Documents control panel appears.
4. Under **Manage <your group's name> documents**, find the document you want to edit or delete. Then click  to delete the document or  to edit the document. If you click , the document disappears immediately, and you are finished. If you click , the Update Document control panel appears.
5. Update the following fields as necessary:

Name

Enter a name for the document. This name will identify the document when it is displayed in the portal.

Description

Enter a short description for the document. The description will appear after the name when the document is displayed on a list.

Keywords

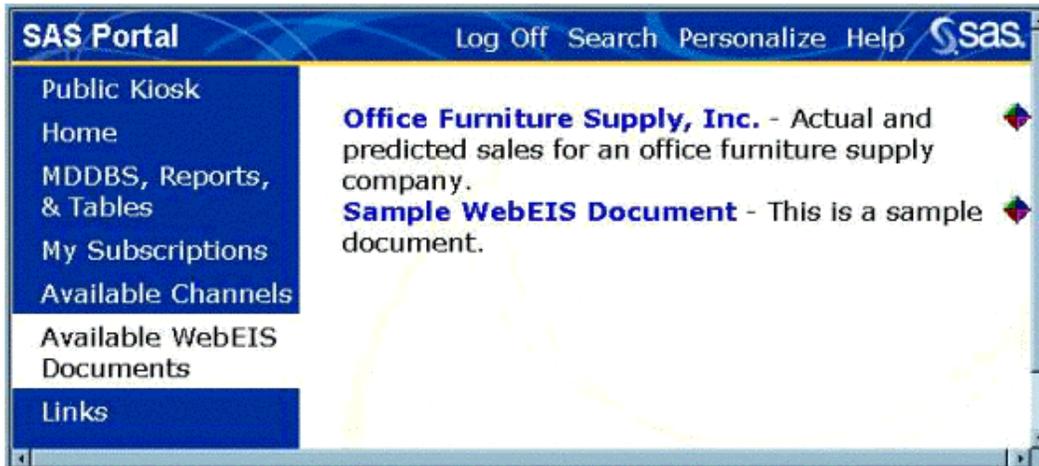
Enter key words that will help you find this document when you use the Search tool. This field is optional.

6. Click **Update Document**. The Documents control panel reappears.

Adding and Editing Personal webEIS™ Documents

The SAS Information Delivery Portal allows you to add your own personal webEIS documents to the portal. webEIS documents provide point-and-click access to live data from enterprise databases that can be centrally located on SAS servers. The data is presented in the form of charts, tables, and images. Users can drill into the data, create subsets, highlight exceptions, and create new computations.

After adding webEIS documents to the portal, you can include them in lists and display them in windows in the portal. In the following example, the Available webEIS Documents window shows a list of sample webEIS documents.



Adding a Personal webEIS Document

To add a new personal webEIS document:

1. If the webEIS document has already been created and installed in the portal file system, skip to step 2. If not, follow these steps:
 - a. Use the SAS webEIS application (Version 2.0 or later) to create a webEIS document. Save the document as a JSP file.
 - b. Move or copy the JSP file to the server on which the SAS Information Delivery Portal application resides. You must store the JSP file on the server in or below the Portal directory, which is created automatically when you install the portal application. This directory contains subdirectories expressly for JSP files. If you do not know where the directory is located or if you do not have write access to it, please contact your portal system administrator for assistance.
2. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
3. At the prompt **Select a role to personalize**, choose **Personal**.
4. At the prompt **Select what to personalize**, choose **webEIS Documents** from the drop-down list. The Personal webEIS Documents control panel appears showing the existing webEIS documents.
5. Opposite **Add a new personal webEIS document**, click **+** to add a webEIS document. The New Personal webEIS Document control panel appears.
6. Fill in the fields as follows:

Name

Enter a name for the webEIS document. This name will identify the webEIS document when

it is displayed in the portal.

JSP

Enter the path to the JSP file that displays the webEIS document. The path must be relative to the Portal directory where the portal Web application resides (see step 1b). For example:

```
/jsp/html/samples/WebEISSample1.jsp
```

Description

Enter a short description for the webEIS document. The description will appear after the name when the webEIS document is displayed on a list.

Keywords

Enter key words that will help you find this webEIS document when you use the Search tool. This field is optional.

7. Click **Create webEIS Document**. The Personal webEIS Document control panel reappears showing the new webEIS document. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To display the new webEIS document, you must now add it to a list. For instructions, see [Creating and Editing Personal Lists](#).

For more information on viewing webEIS documents, see [Viewing webEIS Documents](#).

Editing or Deleting Personal webEIS Documents

To edit or delete an existing personal webEIS document:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal**.
3. At the prompt **Select what to personalize**, choose **webEIS Documents** from the drop-down list. The Personal webEIS Documents control panel appears.
4. Under **Manage personal webEIS documents**, find the webEIS document you want to edit or delete. Then click  to delete the webEIS document or  to edit the webEIS document. If you click , the webEIS document disappears immediately, and you are finished. If you click , the Update Personal webEIS Document control panel appears.
5. Update the **Name**, **JSP**, **Description**, and **Keywords** fields as necessary.
6. Click **Update webEIS Document**. The Personal webEIS Documents control panel reappears.

Note: For the change to take effect, you must log off of the portal and then log back on.

Adding and Editing Role-Based webEIS™ Documents

Role-based webEIS documents are webEIS documents that are available only to the users assigned to a particular group. If you have authorization as the owner of a group, you can create and edit role-based webEIS documents for that group. After you create a role-based webEIS document, you can add it to one or more *role-based lists* that have been defined for the group. In addition, users in the group can add the role-based webEIS document to their own personal lists.

Adding a Role-Based webEIS Document

To add a new role-based webEIS document:

1. If the webEIS document has already been created and installed in the portal file system, skip to step 2. If not, follow these steps:
 - a. Use the SAS webEIS application (Version 2.0 or later) to create a webEIS document. Save the document as a JSP file.
 - b. Move or copy the JSP file to the server on which the SAS Information Delivery Portal application resides. You must store the JSP file on the server in or below the Portal directory, which is created automatically when you install the portal application. This directory contains subdirectories expressly for JSP files. If you do not know where the directory is located or if you do not have write access to it, please contact your portal system administrator for assistance.
2. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
3. At the prompt **Select a role to personalize**, choose the group whose webEIS documents you are updating.
4. At the prompt **Select what to personalize**, choose **webEIS Documents** from the drop-down list. The webEIS Documents control panel appears showing the group's role-based webEIS documents.
5. Opposite **Add a new <your group's name> webEIS document**, click  to add a new webEIS document. The New webEIS Document control panel appears.
6. Fill in the fields as follows:

Name

Enter a name for the webEIS document. This name will identify the webEIS document when it is displayed in the portal.

JSP

Enter the path to the JSP file that displays the webEIS document. The path must be relative to the Portal directory where the portal Web application resides (see step 1b). For example:

```
/jsp/html/samples/WebEISSample1.jsp
```

Description

Enter a short description for the webEIS document. The description will appear after the name when the WebEIS document is displayed on a list.

Keywords

Enter key words that will help group members find this WebEIS document when they use the Search tool. This field is optional.

7. Click **Create WebEIS Document**. The WebEIS Documents control panel reappears showing the new WebEIS document. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To make use of the WebEIS document, you might want to add it to a role-based list. For instructions, see [Creating and Editing Role-Based Lists](#). In addition, the users in the group will be able to add the WebEIS document to their own personal lists.

For more information on viewing WebEIS documents, see [Viewing WebEIS Documents](#).

Editing or Deleting Role-Based WebEIS Documents

If you have authorization as group owner, you can edit or delete an existing role-based WebEIS document for the group.

To edit or delete an existing role-based WebEIS document:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose WebEIS documents you are updating.
3. At the prompt **Select what to personalize**, choose **WebEIS Documents** from the drop-down list. The WebEIS Documents control panel appears.
4. Under **Manage <your group's name> WebEIS documents**, find the WebEIS document you want to edit or delete. Then click  to delete the WebEIS document or  to edit the WebEIS document. If you click , the WebEIS document disappears immediately, and you are finished. If you click , the Update WebEIS Document control panel appears.

5. Update the **Name**, **JSP**, **Description**, and **Keywords** fields as necessary.
6. Click **Create WebEIS Document**. The WebEIS Documents control panel reappears.

Note: For the change to take effect, you must log off of the portal and then log back on.

Adding and Editing Personal Widgets

The SAS Information Delivery Portal allows you to create windows that display your own personal widgets. A widget is a graphical user interface (GUI) component that is produced by a Java Server Page (JSP). In the following example, the Home window displays a sample widget.

The screenshot shows the SAS Portal interface. The top navigation bar includes 'SAS Portal', 'Log Off', 'Search', 'Personalize', 'Help', and the SAS logo. The left sidebar contains links for 'Public Kiosk', 'Home', 'MDDBS, Reports, & Tables', 'My Subscriptions', 'Available Channels', 'Available WebEIS Documents', and 'Links'. The main content area displays a 'Sample Widget' table with the following data:

Country	Product	Sales
CANADA	BED	25885.0
	CHAIR	25777.0
	DESK	26512.0
	SOFA	23415.0
	TABLE	24381.0
GERMANY	BED	22616.0
	CHAIR	23960.0
	DESK	23344.0
	SOFA	24332.0
	TABLE	24342.0
U.S.A.	BED	24073.0
	CHAIR	25523.0
	DESK	23209.0
	SOFA	21409.0
	TABLE	22082.0

A diagram on the right side of the screenshot shows a yellow bracket labeled 'Widget' encompassing the table, and a larger yellow bracket labeled 'Window' encompassing the entire page content area.

Before you can create a window that is defined by a widget, you must add the widget and its metadata to the portal, as described below.

Adding a Personal Widget

To add a new personal widget:

1. Move or copy the JSP file for the widget to the server on which the SAS Information Delivery Portal application resides. You must store the JSP file on the server in or below the Portal directory, which is created automatically when you install the portal application. This directory contains subdirectories expressly for JSP files. If you do not know where the directory is located or if you do not have write access to it, please contact your portal system administrator for assistance.
2. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
3. At the prompt **Select a role to personalize**, choose **Personal**.
4. At the prompt **Select what to personalize**, choose **Widgets** from the drop-down list. The Personal Widgets control panel appears showing the existing widgets.
5. Opposite **Add a new personal widget**, click  to add a widget. The New Personal Widget control panel appears.
6. Fill in the fields as follows:

Name

Enter a name for the widget. This name will identify the widget on the portal's Personalization screens.

JSP

Enter the path to the JSP file that displays the widget. The path must be relative to the Portal directory where the portal Web application resides (see step 1). For example:

```
/jsp/html/samples/WidgetSample1.jsp
```

Description

Enter a short description for the widget. The description will appear after the name when the widget is displayed in on Personalization screens.

Pre-defined

Always select this check box to indicate that the widget is pre-defined. The current version of the SAS Information Delivery Portal supports only pre-defined widgets. A pre-defined widget is one that is fully defined by the JSP and the portal's metadata.

Parameters

If the JSP requires parameters in order to run, enter the following information for each parameter:

Name

Enter a unique name for the parameter.

Default value

Enter a default value. This is the value that is assigned to the parameter when the widget is displayed in the portal.

After you specify the values for the parameter, click **Save Parameter**. To enter information for another parameter, click **Add New Parameter**. If you need to delete a parameter, select the parameter from the Parameters list and click **Delete Parameter**.

7. Click **Create Widget**.
8. Click **Done**. The Personal Widgets control panel reappears showing the new widget. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To display the new widget, you must create a new window that is defined by the widget. For instructions, see *Creating and Editing Personal Windows*.

Editing or Deleting Personal Widgets

To edit or delete an existing personal widget:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
 2. At the prompt **Select a role to personalize**, choose **Personal**.
 3. At the prompt **Select what to personalize**, choose **Widgets** from the drop-down list. The Personal Widgets control panel appears.
 4. Under **Manage personal widget**, find the widget you want to edit or delete. Then click  to delete the widget or  to edit the widget. If you click , the widget disappears immediately, and you are finished. If you click , the Update Personal Widget control panel appears.
 5. Update the **Name**, **JSP**, **Description**, and **Pre-defined** fields as necessary. You can also update the parameters for the widget. Select the parameter you want to edit from the Parameters list and change the values for the parameter as needed.
 6. Click **Update Widget**. The Personal Widgets control panel reappears.
-

Adding and Editing Role-Based Widgets

Role-based widgets are widgets that are available only to the users assigned to a particular group. If you have authorization as the owner of a group, you can create and edit role-based widgets for that group. After you create a role-based widget, you can add it to one or more *role-based windows* that have been defined for the group. In addition, users in the group can add the role-based widget to their own personal windows.

Before you can create a window that is defined by a widget, you must add the widget and its metadata to the portal as described below.

Adding a Role-Based Widget

To add a new role-based widget:

1. Move or copy the JSP file for the widget to the server on which the SAS Information Delivery Portal application resides. You must store the JSP file on the server in or below the Portal directory, which is created automatically when you install the portal application. This directory contains subdirectories expressly for JSP files. If you do not know where the directory is located or if you do not have write access to it, please contact your portal system administrator for assistance.
2. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
3. At the prompt **Select a role to personalize**, choose the group whose widgets you are updating.
4. At the prompt **Select what to personalize**, choose **Widgets** from the drop-down list. The Widgets control panel appears showing the group's role-based widgets.
5. Opposite **Add a new <your group's name> widget**, click  to add a new widget. The New Widget control panel appears.
6. Fill in the fields as follows:

Name

Enter a name for the widget. This name will identify the widget on the portal's Personalization screens.

JSP

Enter the path to the JSP file that displays the widget. The path must be relative to the Portal directory where the portal Web application resides (see step 1). For example:

/jsp/html/samples/WidgetSample1.jsp

Description

Enter a short description for the widget. The description will appear after the name when the widget is displayed on Personalization screens.

Pre-defined

Always select this check box to indicate that the widget is pre-defined. The current version of the SAS Information Delivery Portal supports only pre-defined widgets. A pre-defined widget is one that is fully defined by the JSP and the portal's metadata.

Parameters

If the JSP requires parameters in order to run, enter the following information for each parameter:

Name

Enter a unique name for the parameter.

Default value

Enter a default value for the parameter. This is the value that is assigned to the parameter when the widget is displayed in the portal.

After you specify the values for the parameter, click **Save Parameter**. To enter information for another parameter, click **Add New Parameter**. If you need to delete a parameter, select the parameter from the Parameters list and click **Delete Parameter**.

7. Click **Create Widget**.

8. Click **Done**.

The Widgets control panel reappears showing the new widget you have created. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To display the new widget, you must create a new window that is defined by the widget. For instructions, see *Creating and Editing Personal Windows*.

Editing or Deleting Role-Based Widgets

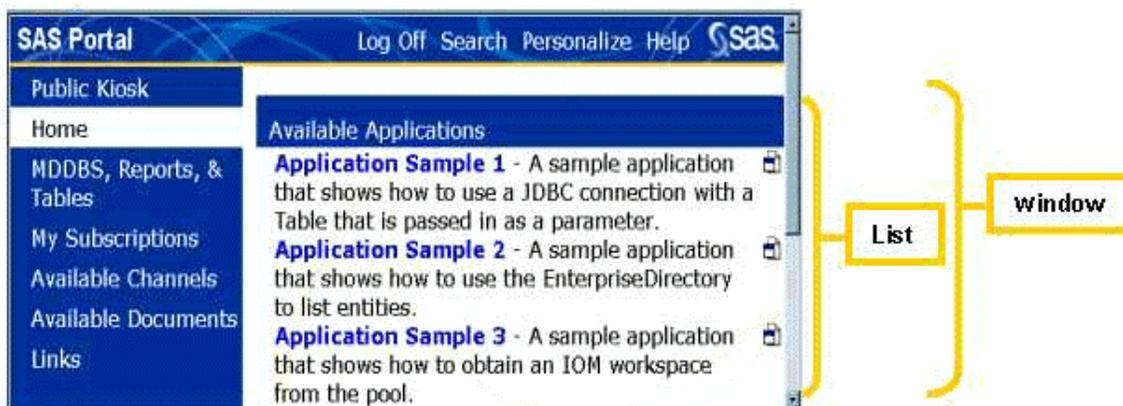
If you have authorization as group owner, you can edit or delete an existing role-based widget for the group.

To edit or delete an existing role-based widget:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose the group whose widgets you are updating.
3. At the prompt **Select what to personalize**, choose **Widgets** from the drop-down list. The Widgets control panel appears.
4. Under **Manage <your group's name> widgets**, find the widget you want to edit or delete. Then click **X** to delete the widget or **✎** to edit the widget. If you click **X**, the widget disappears immediately, and you are finished. If you click **✎**, the Update Widget control panel appears.
5. Update the **Name**, **JSP**, **Description**, and **Pre-defined** fields as necessary. You can also update the parameters for the widget. Select the parameter you want to edit from the Parameters list and change the values for the parameter as needed.
6. Click **Update Widget**. Then click **Done**. The Widget control panel reappears.

Adding and Editing Personal Applications

The SAS Information Delivery Portal allows you to add your own personal applications to the portal. You can then include the applications in lists and launch them from the portal. In the following example, the Home window contains a list of applications.



Adding a Personal Application

To add a new personal application:

1. Move or copy the JSP file for the application to the server on which the SAS Information Delivery Portal application resides. You must store the JSP file on the server in or below the Portal directory, which is created automatically when you install the portal application. This directory contains subdirectories expressly for JSP files. If you do not know where the directory is located or if you do not have write access to it, please contact your portal system administrator for assistance.
2. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
3. At the prompt **Select a role to personalize**, choose **Personal**.
4. At the prompt **Select what to personalize**, choose **Applications** from the drop-down list. The Personal Applications control panel appears showing the existing applications.
5. Opposite **Add a new personal application**, click  to add an application. The New Personal Application control panel appears.
6. Fill in the fields as follows:

Name

Enter a name for the application. This name will identify the application on the portal's Personalization screens.

JSP

Enter the path to the JSP file that displays the application. The path must be relative to the Portal directory where the portal Web application resides (see step 1). For example:

```
/jsp/html/samples/AppSample1.jsp
```

Description

Enter a short description for the application. The description will appear after the name when the application is displayed on Personalization screens.

Parameters

If the JSP requires parameters in order to run, enter the following information for each parameter:

Name

Enter a unique name for the parameter.

Default value

Enter a default value for the parameter. This is the value that is assigned to the parameter when the application is displayed in the portal.

After you specify the values for the parameter, click **Save Parameter**. To enter information for another parameter, click **Add New Parameter**. If you need to delete a parameter, select the parameter from the Parameters list and click **Delete Parameter**.

7. Click **Create Application**.
8. Click **Done**. The Personal Applications control panel reappears showing the new application. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To access the new application, you must now add it to a list. For instructions, see [Creating and Editing Personal Lists](#).

Editing or Deleting Personal Applications

To edit or delete an existing personal application:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal**.
3. At the prompt **Select what to personalize**, choose **Applications** from the drop-down list. The Personal Applications control panel appears.
4. Under **Manage personal application**, find the application you want to edit or delete. Then click  to delete the application or  to edit the application. If you click , the application disappears immediately, and you are finished. If you click , the Update Personal Application control panel appears.
5. Update the **Name**, **JSP**, and **Description** fields as necessary. You can also update the parameters for the application. Select the parameter you want to edit from the Parameters list and change the values for the parameter as needed.
6. Click **Update Application**. Then click **Done**. The Personal Applications control panel reappears.

Adding and Editing Role-Based Applications

Role-based applications are applications that are available only to the users assigned to a particular group. If you have authorization as the owner of a group, you can create and edit role-based applications for that group. After you create a role-based application, you can add it to one or more *role-based lists* that have been defined for the group. In addition, users in the group can add the role-based application to their own personal lists.

Adding a Role-Based Application

To add a new role-based application:

1. Move or copy the JSP file for the application to the server on which the SAS Information Delivery Portal application resides. You must store the JSP file on the server in or below the Portal directory, which is created automatically when you install the portal application. This directory contains subdirectories expressly for JSP files. If you do not know where the directory is located or if you do not have write access to it, please contact your portal system administrator for assistance.
2. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
3. At the prompt **Select a role to personalize**, choose the group whose applications you are updating.
4. At the prompt **Select what to personalize**, choose **Applications** from the drop-down list. The Applications control panel appears showing the group's role-based applications.
5. Opposite **Add a new <your group's name> application**, click  to add a new application. The New Application control panel appears.
6. Fill in the fields as follows:

Name

Enter a name for the application. This name will identify the application on the portal's Personalization screens.

JSP

Enter the path to the JSP file that displays the application. The path must be relative to the Portal directory where the portal Web application resides (see step 1). For example:

```
/jsp/html/samples/AppSample1.jsp
```

Description

Enter a short description for the application. The description will appear after the name when the application is displayed on Personalization screens.

Pre-defined

Select this check box if the application is pre-defined. If it is pre-defined, then the application can run without parameters being passed in. You must add pre-defined applications directly to a window. If an application requires that parameters be passed in order to run, then it is not pre-defined.

Parameters

If the JSP requires parameters in order to run, enter the following information for each parameter:

Name

Enter a unique name for the parameter.

Default value

Enter a default value for the parameter. This is the value that is assigned to the parameter when the application is displayed in the portal.

After you specify the values for the parameter, click **Save Parameter**. To enter information for another parameter, click **Add New Parameter**. If you need to delete a parameter, select the parameter from the Parameters list and click **Delete Parameter**.

7. Click **Create Application**.
8. Click **Done**. The Applications control panel reappears showing the new application. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Note: To display the new application, you must now add it to a list. For instructions, see [Creating and Editing Personal Windows](#).

Editing or Deleting Role-Based Applications

If you have authorization as group owner, you can edit or delete an existing role-based application for the group.

To edit or delete an existing role-based application:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
 2. At the prompt **Select a role to personalize**, choose the group whose applications you are updating.
 3. At the prompt **Select what to personalize**, choose **Applications** from the drop-down list. The Applications control panel appears.
 4. Under **Manage <your group's name> applications**, find the application you want to edit or delete. Then click  to delete the application or  to edit the application. If you click , the application disappears immediately, and you are finished. If you click , the Update Application control panel appears.
 5. Update the **Name**, **JSP**, and **Description** fields as necessary. You can also update the parameters for the application. Select the parameter you want to edit from the Parameters list and change the values for the parameter as needed.
 6. Click **Update Application**. Then click **Done**. The Applications control panel appears.
-

Managing Your Subscriptions

The SAS Information Delivery Portal enables you to subscribe to information that is transmitted through *channels*, each of which provides a particular category of information. By subscribing to a channel, you become a recipient of information that is published through that channel.

The portal provides access to two types of channels:

- *SAS publication channels*, which are set up through the SAS Publishing Framework. As a portal user, you have a *subscriber profile* that defines the method of information transport from this framework. You can set up filters in your subscriber profile to include and exclude particular types of information. For details, see *Managing Your Subscriber Profiles*.
- *Content channels*, which provide syndicated content from information providers such as news services.

Subscribing to (and Unsubscribing from) Channels:

To subscribe to (or unsubscribe from) a channel:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select what to personalize**, choose **Subscriptions** from the drop-down list. The Subscriptions control panel appears showing your current subscriptions (if any) and the additional channels that are available for subscription.
3. To subscribe to a new channel:
 1. Under **Available Channels**, find the desired channel.
 2. Click  opposite the desired channel.
 3. If you have more than one subscriber profile, a list of your profiles will be displayed. Click the radio button for the profile that you want to use.
 4. The channel will disappear from the **Available Channels** list and will appear under **Current Subscriptions**. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

To unsubscribe from a channel:

1. Under **Current Subscriptions**, find the channel from which you want to unsubscribe.
2. Click  opposite the corresponding channel.

3. The channel will be removed from the **Current Subscriptions** list and will be placed under **Available Channels**. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Use the Personalize tool to add lists of your current subscriptions to your portal. For details, see *Personalizing Your Desktop*. For information on viewing channel content through the portal, see *Viewing Channel Content*.

Managing Your Subscriber Profiles

The SAS Information Delivery Portal enables you to update the subscriber profile that is maintained for you in the SAS Publishing Framework. When you subscribe to a publication channel, your subscriber profile controls the method of transport and the destination for package delivery. You can also enter name/value pairs in your subscriber profile to serve as filters. When the method of transport is e-mail or queue, you will receive only those packages that meet your filter criteria. These filters do not affect the channel content that appears in the portal.

You can set up multiple subscriber profiles, each with a different transport method and a different set of filters. The SAS Publishing Framework will treat each profile as a separate subscriber. When you subscribe to a publication channel in the portal, you will be prompted to specify which subscriber profile to use.

Regardless of your subscriber profile settings, you will still be able to use the portal to view content that is published through any of the available channels.

Adding a Subscriber Profile

To add a new subscriber profile for yourself:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select what to personalize**, choose **Subscriber Profiles** from the drop-down list. The Subscriber Profiles control panel appears.
3. Click  opposite **Add a new personal profile**. The New Personal Profile control panel appears.
4. Enter a description for the profile.
5. Select a radio button to indicate the delivery transport method you would like:
 - Select **Email** if you want published packages to be sent to your e-mail address. Click **Next**.

Then enter the address in the field provided, and select a radio button to indicate whether the information is to be in text or HTML format. Then click **Next**.

- Select **Queue** if you want published packages to be sent to a message queue. Click **Next**. Then enter the queue address in the field provided, and click **Next**.
 - Select **None** if you want to view packages in the portal instead of having them sent. Then click **Next**. All content published through available channels will be viewable through the portal, regardless of your subscriber profile settings.
6. In the **Name/Value inclusion** field, you can enter name/value pairs to be used as filters for the inclusion of packages. If the delivery transport method is **Email** or **Queue**, packages will be delivered to you only if they have these name/value pairs associated with them. The name/value pairs do *not* affect channel content that appears in the portal. For the delivery transport method **Queue**, you can also specify files and entries to be included.
 7. In the **Name/Value exclusion** field, you can enter name/value pairs to be used as filters for the exclusion of packages. If the delivery transport method is **Email** or **Queue**, packages will not be delivered to you if they have these name/value pairs associated with them. The name/value pairs do *not* affect channel content that appears in the portal. For the delivery transport method **Queue**, you can also specify files and entries to be excluded.

For more information, see the section on Filter String Syntax.

8. Click **Create Profile**. The Subscriber Profiles control panel will reappear with the new profile listed under **Manage personal subscriber profiles**. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

For information about how to subscribe to a channel, see [Managing Your Subscriptions](#).

Viewing and Editing Your Subscriber Profile

To view or edit your subscriber profile:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select what to personalize**, choose **Subscriber Profiles** from the drop-down list. The Subscriber Profiles control panel appears.
3. Find the desired profile under **Manage personal subscriber profiles**.
4. Click  opposite the profile name. The Update Personal Profile control panel appears.
5. Update **Description** field as necessary.

6. Update the **Delivery Transport** method as necessary.
 - Select **Email** if you want published packages to be sent to your e-mail address. Click **Next**. Then enter the address in the field provided, and select a radio button to indicate whether the information is to be in text or HTML format. Then click **Next**.
 - Select **Queue** if you want published packages to be sent to a message queue. Click **Next**. Then enter the queue address in the field provided, and click **Next**.
 - Select **None** if you want to view packages in the portal instead of having them sent. Then click **Next**. (All content published through available channels will be viewable through the portal, regardless of your subscriber profile settings.)
7. In the **Name/Value inclusion** field, you can enter name/value pairs to be used as filters for the inclusion of packages. If the delivery transport method is **Email** or **Queue**, packages will be delivered to you only if they have these name/value pairs associated with them. The name/value pairs do *not* affect channel content that appears in the portal. For the delivery transport method **Queue**, you can also specify files and entries to be included.
8. In the **Name/Value exclusion** field, you can enter name/value pairs to be used as filters for the exclusion of packages. If the delivery transport method is **Email** or **Queue**, packages will not be delivered to you if they have these name/value pairs associated with them. The name/value pairs do *not* affect channel content that appears in the portal. For the delivery transport method **Queue**, you can also specify files and entries to be included.

For more information, see the section on Filter String Syntax.

9. Click **Update Profile**. The Subscriber Profiles control panel window will reappear. You can now proceed by choosing another Personalize function, choosing another task, or opening another window.

Filter String Syntax

In the SAS Publishing Framework, publishers can specify name/value pairs that describe the package being published. To construct meaningful name/value filters, it is helpful to know the conventions that the publisher will use to describe packages at the time of publication.

Use the following syntax to enter name/value pairs to be used as filters

name < operator value >

where *name* is a variable to which a value might be assigned. *Name* is not case-sensitive. *Operator* relates the variable to the value. Commonly used operators are the comparison operators and the logical operators, which follow:

Comparison Logical

= equals & AND

!= not equal | OR

? contains

Value in the form of a string or a numeric value is appropriately assigned to the variable. *Value* is case-sensitive.

Examples

The following is an example of a package description using name/value pairs that a publisher has assigned to a published package:

```
market=(Mexico, US) type=report Quarter4 sales _priority_=low
```

The following examples illustrate filter strings that determine whether the preceding example entity would be selected by the filter. If the package meets the filter's conditions, the package is delivered to the subscriber.

```
market=(US, Asia, Europe)
```

NO MATCH. Because the equals comparison operator (=) is used, the subscriber's values and the publisher's values that are assigned to the variable name MARKET must match exactly. In this example, the subscriber filters are US, Asia, and Europe, whereas the publisher assigns a value of Mexico and US. The conditions for selection are not met. Therefore, the package is not delivered to the subscriber.

```
market=(mexico, us)
```

NO MATCH. Because the equals comparison operator (=) is used, the subscriber's values and the publisher's values that are assigned to the variable name MARKET must match exactly. In this example, the subscriber's values do not match the publisher's values because of case differences. Therefore, the package is not delivered to the subscriber.

```
market=US | market=Asia | market=Mexico
```

NO MATCH. Because the equals comparison operator (=) is used, the subscriber's values and the publisher's values that are assigned to the variable name MARKET must match exactly. In this example, although the OR operator (|) might seem to cause a matching condition, the equals operator (=) requires that each name/value pair that is separated by an OR operator (|) match the publisher's name/value pair entirely. A match would result if the subscriber's values were written as follows:

```
market=Mexico, US | market=Asia | market=Mexico
```

The first name/value pair in the series would match. Therefore, the package would be delivered to

the subscriber.

```
market=(Mexico, US)
```

MATCH. Because the equals comparison operator (=) is used, the subscriber's values and the publisher's values that are assigned to the variable name MARKET must match exactly. In this example, the value set does match. Therefore, the package is delivered to the subscriber.

```
market=(US, Mexico)
```

MATCH. Because the equals comparison operator (=) is used, the subscriber's values and the publisher's values that are assigned to the variable name MARKET must match exactly. In this example, the value set matches, regardless of the order of values within the value set. Therefore, the package is delivered to the subscriber.

```
market?US & market?Asia & market?Mexico
```

NO MATCH. The conditions that are specified in the subscriber's name/value pair read: Variable name MARKET must contain the values US and Asia and Mexico. The contains comparison operator (?) identifies the eligible values for consideration. In this example, although the publisher's variable MARKET contains US and Mexico, it does not also contain Asia. Because the logical AND operator (&) is used, its condition is not satisfied. Therefore, the package is not delivered to the subscriber.

```
market?US | market?Asia | market?Mexico
```

MATCH. The conditions that are specified in the subscriber's name/value pair read: Variable name MARKET must contain the values US or Asia or Mexico. The contains comparison operator (?) identifies the eligible values for consideration. In this example, the publisher's variable MARKET contains US, and the logical OR operator (|) condition is satisfied. Therefore, the package is delivered to the subscriber.

```
Quarter4=sales
```

NO MATCH. Because the equals comparison operator (=) is used, the subscriber's values and the publisher's values that are assigned to the variable name QUARTER4 must match exactly. In this example, because the publisher's variable name QUARTER4 does not contain a value and the subscriber's variable name QUARTER4 does contain a value of sales, the value sets do not match. Therefore, the package is not delivered to the subscriber.

```
Quarter4
```

MATCH. Variable names are not required to have values. In this example, because the publisher's variable name QUARTER4 does not have an assigned value and the subscriber's variable name QUARTER4 does not have an assigned value, the value sets match. Therefore, the package is delivered to the subscriber.

```
type=report & forecast
```

NO MATCH. Two conditions must be met. The equals comparison operator (=) requires that the subscriber's values and the publisher's values that are assigned to variable name TYPE match. In this example, the first condition is met because both the publisher and the subscriber assign the value `report` to variable TYPE. However, the AND logical operator (&) also requires that the variable name TYPE also be assigned the value `forecast`. Because the publisher's variable name TYPE is not assigned a value of `forecast`, the final condition is not met. Therefore, the package is not delivered to the subscriber.

```
type=report & sales
```

MATCH. Two conditions must be met. The equals comparison operator (=) requires that the subscriber's value and the publisher's value that are assigned to variable name TYPE match. In this example, the values match. Both assign the value `report` to the variable name TYPE. The AND logical operator (&) also requires that the variable name SALES match. Because both the publisher and the subscriber identify a variable name SALES with no assigned value, the final condition is also met. Therefore, the package is delivered to the subscriber.

Changing Your Password

The SAS Information Delivery Portal allows you to change your password at any time.

To change your portal password:

1. If you have not already done so, open the SAS Information Delivery Portal, log on with your user name and current password, and click **Personalize** on the toolbar. The Personalize window appears.
2. At the prompt **Select a role to personalize**, choose **Personal** from the drop-down list.
3. At the prompt **Select what to personalize**, choose **Account** from the drop-down list. The Manage Personal Account panel appears.
4. Fill in the fields as follows:

Original Password

Enter the password that you currently use to log on to the portal.

New Password

Enter a new password of your choice.

Confirm Password

Re-enter the new password to confirm correct spelling and capitalization.

5. Click **Update** to save the new password, or click **Cancel** to clear all of the fields and start again.
