

Installation Instructions

SAS[®] Add-In for Microsoft Office, 1.3

Installing SAS Add-In for Microsoft Office

Before installing SAS Add-In for Microsoft Office, please close any instances of Microsoft Excel or Microsoft Word. Insert the SAS BI Reporting Clients CD in your CD-ROM drive. If the CD does not autorun, select **Start**, then **Run**, and enter `d:\setup.exe` in the text box, where `d:` is your CD-ROM drive. Select SAS Add-in for Microsoft Office in the navigation pane. After reviewing the information on the page, click **Install** in the installation table.

Notes

SAS Add-in for Microsoft Office requires the Microsoft .NET Framework as well as several other system components. When you run the install, the install may tell you you are missing some required components and that you should run the System Requirements Wizard (SRW) to check for any needed updates. Please refer to the section titled, “**Using the System Requirements Wizard**” below. Some system updates may require the system to be rebooted. If a reboot occurs, you may need to restart the SAS Add-in for Microsoft Office install.

You must be an administrator to install the SAS Add-in for Microsoft Office product.

Using the System Requirements Wizard

The System Requirements Wizard makes sure that the minimum system requirements are installed on your computer before the SAS Add-In for Microsoft Office is installed. The System Requirements Wizard may update system components that are part of the operating system. Updating these components to appropriate levels is an important part of a successful add-in installation.

It is possible that some of the system components that need to be updated by the System Requirements Wizard will be in use by the operating system. Unfortunately, this situation will require a reboot of the computer to properly update the system components in use. Closing down all other running applications, including virus-scanning programs, before starting the System Requirements Wizard can keep the number of required reboots to a minimum. The number of reboots that will be required can vary from computer to computer, since it is determined by the level of the system components installed on the computer when the System Requirements Wizard is run.

Starting the System Requirements Wizard

The System Requirements Wizard should be run as part of the install process for the add-in. To manually run the System Requirements Wizard, run the `setup.exe` from the `srw` subdirectory of the add-in install such as:
`d:\SAS\Add-In for Microsoft Office\srw\setup.exe`

The System Requirements Wizard will guide you through a series of dialogs to inform you of the needed updates.

Welcome to the System Requirements Wizard

Click **Next** or click **Cancel** to exit the System Requirements Wizard.

Automatic Log On

The System Requirements Wizard may require a reboot. If you want to log on automatically after any reboots, enter your password in the **Password** field. This is optional, and you can click **Next** to skip automatic log on. If you enter a password, you will need to enter it again in the **Confirm** password field. Click **Next** to go on, click **Back** to view the **Welcome** window, or click **Cancel** to exit the System Requirements Wizard.

System Components Update

This window displays the names of the system components that will be updated on your system. Click **Next** to go on, click **Back** to view the **Automatic Log On** window, or click **Cancel** to exit the System Requirements Wizard.

Restarting Windows

This window displays the names of the system components that have been updated on your system, and indicates that your computer must be rebooted. SAS recommends that you reboot your computer now. Click on one of the two radio buttons:

- **Yes, I want to restart my computer now.**
- **No, I will restart my computer later.**

If you choose to reboot, close all open applications and remove any floppy disks from the disk drives. Verify that all virus-scanning software has been disabled after the computer restarts.

Click **Finish**.

System Update Finished

This dialog indicates that the System Requirements Wizard has updated your system.

Click **Finish**.

Configuring the SAS Metadata Server for use by SAS Add-In for Microsoft Office

After SAS Add-In for Microsoft Office is installed, you should configure your machine to tell it which SAS Metadata Server to connect to by default. You will be prompted for this configuration info the first time you attempt to access the SAS Metadata Server from the add-in. Or, you can configure the connection before running the add-in by running the `itconfig` utility that ships with SAS Integration Technologies client. The `itconfig` utility should be available from the SAS→SAS 9.1 Utilities menu. Please refer to the instructions included with the SAS Integration Technologies Administrator's Guide on Using ITConfig to Create Metadata Configuration Files for details on how to set things up appropriately. An example `itconfig` scenario is included below:

When you invoke `itconfig`, you should make the following choices:

Select Create Metadata Config File → Next

SAS Metadata Server → Next

The Configure Metadata Server window opens. Select the appropriate settings based on what user you are creating the config file for (all users or this particular user). Also select the appropriate bridge protocol. For this example, we are selecting that we are defining the metadata server connection for current user using a bridge protocol. Click **Next**.

The **Configure SAS Metadata Server for Current User** window opens. The following is an example of its layout.

Configure SAS Metadata Server for Current User

Server Information
 The Machine Name is the DNS name of the computer on which your SAS Metadata Server is running.
 Machine Name (machine.company.com): testmachine.sas.com
 Choose either Port or Service and enter the appropriate value.
 Port Port: 8561
 Service
 Server configuration will be stored here:
 C:\Documents and Settings\jbc\Application Data\SAS\Metadat:

Login Information
 Enter a valid username and password for your server.
 Username: testmachine\guest (domain\username) may be required
 Password: *****
 Authentication Domain (optional): testmachine
 Use this login information each time you connect.
 Prompt for login information each time you connect.
 Please read the Help dialog if you will be configuring an object spawner with this metadata config file.

<< Back Next >> Cancel Help

Fill in the appropriate information and click **Next**. Select a default repository. Click **Save**. Exit from the utility.

Notes

You must be an administrator to configure the SAS Metadata Server for all users.

Using SAS Add-In for Microsoft Office

Now you are ready to use the SAS Add-in for Microsoft Office. When you invoke Microsoft Excel or Microsoft Word, you should see a SAS menu and two SAS toolbars as part of your environment. For details on using the SAS Add-In for Microsoft Office, select the SAS menu and select the Help item or select the Help button from the SAS toolbar.

Deploying the Add-In to Multiple Machines

System Administrators often desire to deploy system updates throughout an organization. Silent installs are provided to support this type of deployment for the add-in. There are two parts to the add-in install and these must be deployed separately. First, all machines must be updated to the minimum system requirements. This step needs to be performed independently of the add-in install since different machines may have different sets of installed components. After the machines have been updated for the required set of system components, you can record a script for the add-in install so you can deploy the install silently. **You must either include a default configuration file to be deployed to each machine or run itconfig on each individual machine. If you want everything to be set up for the user, you should include a default configuration file as documented in the section below “Setting up the SAS Metadata Server as Part of the Deployment Process.”**

Using Quiet Mode to Deploy the System Requirements

The System Requirements Wizard has been designed with Quiet Mode support for Administrators who must deploy system updates throughout an organization.

When the System Requirements Wizard runs in Quiet Mode, the system will perform updates, reboot, and automatically log back on until every update has been completed.

Security Note

Using the AutoID, AutoPwd, and AutoDomain command line arguments can pose a security risk. The information specified for these arguments is stored briefly in the Windows registry in plaintext. During the short period of time in which the computer is updated by the SRW, it will also have any of the permissions afforded to that account. Anyone who has physical access to the computer can operate the computer with that account. This would allow access to the computer's contents and networks by a person who might not otherwise have that access.

Commands

The following command line arguments are used to launch the System Requirements Wizard in Quiet Mode:

`-s`

This switch indicates that the Setup should be run silently.

`-f2<logfile>`

The f2 option specifies where the log file should be created. Use this switch to specify a valid location where you have write permission. Without a valid location and write permission, the System Requirements Wizard may terminate with no indication of failure.

`AutoID:<username>`

AutoID is used to specify the account used to log back on to the system after an automatic reboot has taken place.

`AutoDomain:<domain>`

AutoDomain specifies the domain to which the system should be logged on following a reboot.

`AutoPwd:<password>`

AutoPwd specifies the password for the AutoID specified to allow automatic log on to succeed.

`LaunchApp:<full path to an application>`

LaunchApp allows the user to start another application after the SRW has finished its updates. This is useful for starting the add-in installation after the SRW finishes, or for executing a personal logging tool.

`LogFile:<logfile>`

The Log File contains more detailed information about the operations performed by the System Requirements Wizard in Quiet Mode. This includes a listing of which components required updating and when reboots were necessary.

`QuietLog:<logfile>`

The QuietLog switch is used to specify where the Quiet Setup should log its results. This log file should be used in conjunction with the /f2 switch and reference the same log file.

Examples:

```
srw\Setup.exe -s -f2"c:\temp\srw.log" "QuietLog:c:\temp\srw.log"  
"LogFile:<Full Path To Detailed LogFile>" "AutoID:<userid>"  
"AutoPwd:<password>" "AutoDomain:<DOMAIN>"
```

Using Silent Setup to Deploy the SAS Add-In

Silent Setup allows an installation to be recorded and then played back later when the add-in is installed on other machines. Using Silent Setup can save systems administrators a lot of time when they are installing software on multiple machines. Please follow the steps listed below.

Considerations

The most common problem encountered during Silent Setup is an out-of-space situation. Before beginning the setup, make sure there is enough free disk space on the machine where installing the add-in. Please refer to the section titled “**System Requirements**” for information on disk space requirements. Due to the nature of Silent Setup, mistakes cannot be rectified immediately. Correcting errors involves re-recording and playing back. Silent Setup cannot recover from a reboot, so make sure each machine meets the minimum system requirements before attempting to record or play back a Silent Setup. If you are prompted during recording or playback to update your system using the System Requirements Wizard, remember that you will have to restart the recording or playback process after the update and subsequent reboots have completed.

Setting up the SAS Metadata Server as Part of the Deployment Process

As part of the deployment process, you can also define the default SAS Metadata Server connection for a machine. If you don’t do this step, each user will need to run the itconfig utility themselves. Refer to the previous section entitled “Configuring the SAS Metadata Server for use by SAS Add-In for Microsoft Office.” To generate a configuration file to be deployed to machines, make sure you select that you are creating a config file for **all users** on the machine. You will probably want to select **Prompt each user for login information when they connect**. This will require each user to authenticate themselves to the SAS Metadata Server using their own id and password. If you are using a shared id, you can select **Use this login information for all users** and the login info you specified will be used to connect users to the SAS Metadata Server. See the following example for the suggested setting choices.

Configure SAS Metadata Server for All Users

Server Information

The Machine Name is the DNS name of the computer on which your SAS Metadata Server is running.

Machine Name (machine.company.com)

testmachine.sas.com

Choose either Port or Service and enter the appropriate value.

Port Port

Service 8561

Server configuration will be stored here:

ers\Application Data\SAS\MetadataServer\oms_serverinfo.xml

Login Information

Enter a valid username and password for your server.

Username: testmachine\guest (domain\username may be required)

Password: *****

Authentication Domain (optional): testmachine

Use this login information for all users.

Use this login information for the current user only

Prompt each user for login information when they connect.

Please read the Help dialog if you will be configuring an object spawner with this metadata config file.

<< Back Next >> Cancel Help

Once you have run this utility an oms_serverinfo.xml file will be created in the appropriate directory on the machine where you invoked the utility. For Windows 2000, the location should be C:\Documents and Settings\All Users\Application Data\SAS\MetadataServer\oms_serverinfo.xml. You can either copy this file into the same directory where the setup.exe for the add-in exists or you can use a command line option (deployfile) to specify the location of this file. See the documentation below for “Playing Back an Installation.”

During the playback of the install, the install will copy this file into the appropriate directory on the target machines. This will ensure that a default SAS Metadata Server connection will already be defined for each user.

You may want the metadata server configuration file to reside in a central location as opposed to being on each person's machine. This would enable you to change the metadata server configuration information without having to deploy a new config file to each person's machine. To do this you need to create the metadata server file as stated above. Copy it to the shared file location that everyone can access. Then, create an `oms_serverinfo.xml` file that contains the following:

```
<?xml version="1.0" standalone="no"?>
<!DOCTYPE omsconfig [<!ENTITY config SYSTEM
"\mymachine\mypath\myconfig.xml">]>
<Redirect>
&config;
</Redirect>
```

Change the `myconfig.xml` filename and path to point to the shared file location. Use this `oms_serverinfo.xml` file for deploying to the target machines. If you need to make changes to the metadata configuration, you can modify the shared file and the changes will be reflected on the target machines the next time they invoke the Office application.

Recording an Installation

You can record an install of the add-in in order to deploy the add-in to other machines. You need to use the options for the setup command to accomplish this.

`-r`

This switch indicates that the Setup should record this installation.

`-fl<full path and filename for recorded script>`

This switch allows you to specify the name of the recorded script.

Example:

```
"o:\SAS\Add-In for Microsoft Office\setup.exe" -r -fl"c:\addin.scr"
```

Note: Do not leave a space between `fl` and the next argument as illustrated in the following examples:

- *Correct:* `setup -r -flc:\mydir\myfile.iss`
- *Incorrect:* `setup -r -fl c:\mydir\myfile.iss`

Playing Back an Installation

To play back a previously recorded Silent Setup script, use the following options:

`-s`

This switch indicates that the Setup should silently playback the recorded installation script.

`-fl<full path and filename for recorded script>`

This switch allows you to specify the name of the recorded script.

`-f2<full path and filename of the log file>`

This switch allows you to force the creation of a log file when the script is being replayed. It is a good idea to use this option to help you track down any install problems.

`"deployfile:<full path and file name>"`

This switch allows you to specify the location of an `oms_serverinfo.xml` file to use for defining the default SAS metadata Server connection. Refer to the Considerations section above for more info on creating this file.

Examples:

```
"o:\SAS\Add-In for Microsoft Office\setup.exe" -s -fl"c:\addin.scr"
"o:\SAS\Add-In for Microsoft Office\setup.exe -s -fl"c:\mydir\myfile.iss" -f2"c:\mydir\mylog.txt"
"deployfile:c:\oms_serverinfo.xml"
```

Note: Do not leave a space between f1 or f2 and the next argument as illustrated in the following examples:

- *Correct:* setup -s -f1c:\mydir\myfile.iss
- *Incorrect:* setup -s -f1 c:\mydir\myfile.iss

Troubleshooting

The log will help to troubleshoot failed installations with its ResponseResult code. Common ResponseResult codes are as follows:

- 0 Success
- 1 General error
- 2 Invalid mode
- 3 Required data not found in the setup.iss file
- 4 Not enough memory available
- 5 File does not exist
- 6 Cannot write to the response file
- 7 Unable to write to the log file
- 8 Invalid path to the InstallShield Silent response file
- 9 Not a valid list type (string or number)
- 10 Data type is invalid
- 11 Unknown error during setup
- 12 Dialogs are out of order
- 51 Cannot create the specified folder
- 52 Cannot access the specified file or folder
- 53 Invalid option selected

Installing the SAS Add-In for Languages Other than English

For this release, the add-in is not localized. You can run the English version of the add-in on any machine. The BI Reporting Clients CD does contain some of the language versions of the system redistributables. When you attempt to install the add-in, the system requirements wizard will run and prompt you for required system components. If the CD does not contain the components in the language your machine requires, you will be informed that you need to update the system components yourself by going to the Microsoft web site. After you have done this, you can install the add-in. Please refer to **System Requirements** for the list of add-in required components.

System Requirements for SAS Add-In for Microsoft Office

Operating Systems

Windows NT 4.0 (Service Pack 6a or greater)
Windows 2000 (Service Pack 2 or greater)
Windows XP

Note: The required Microsoft .NET framework can not be installed on a 64 bit computer.

Minimum Processor Speed

133 MHz
300 MHz or higher recommended

Memory Requirements

128 MB minimum
256 MB or greater recommended

Additional Software Requirements

One of the following Microsoft Office installs

Microsoft Office 2000 (SR1 or greater) for English installs

Microsoft Office 2000 (SP3 or greater) for non-English installs

Microsoft Office 2002

Microsoft Office 2003

SAS Business Intelligence Server

Disk Space Requirements (see breakdown below)

System Components 144 MB

SAS Add-in + Components 59 MB

Total Required Disk Space 203 MB

Required System Components	Version	Disk Space Required
Microsoft .Net Framework	1.1	110 MB*
Microsoft Data Access Components	2.7	20 MB**
Visual C++ Redistributables Bundle	6.0	10 MB
Visual C++ Redistributables Bundle	7.0	4 MB

*The .Net Framework requires 150 MB during the install process for creation of temporary files. The final footprint after the install is 110 MB. The .Net Framework also requires Microsoft Internet Explorer 5.01 or later.

**MDAC already exists on Windows XP so this 20MB is not required on that OS.

SAS/Third party Components	Version	Disk Space Required
SAS Integration Technologies	9.1	2.7 MB
SAS OLE/DB	9.1	5.5 MB
SAS Graph OCX	3.0	6.7 MB
SAS Enhanced Editor	9.1	2.4 MB
SAS Formats	9.1	1.2 MB
Xerces XML Parser	1.5.1	1.3 MB
SyncFusion Redistributables	2.0	4.4 MB
SAS BI Client Tasks	3.0	22.6 MB
SAS Add-In	1.3	5.6 MB

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