



## SAS® Add-In for Microsoft Office

Transparently leverage the power of SAS® data access, reporting and analytics directly from Microsoft Office

### What does SAS® Add-In for Microsoft Office do?

SAS Add-In for Microsoft Office enables business users to transparently leverage the power of SAS data access, reporting and analytics directly from Microsoft Office via integrated menus and toolbars.

### Why is SAS® Add-In for Microsoft Office important?

SAS Add-In for Microsoft Office revolutionizes the world of business intelligence. It provides easy access to SAS' broad and deep set of analytic, reporting and data access functionality from within the Microsoft Office environment.

### For whom is SAS® Add-In for Microsoft Office designed?

SAS Add-In for Microsoft Office is designed for business users, analysts and decision makers who want to view, analyze and share business intelligence directly from Microsoft Office.



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Each day business users everywhere gather, manipulate and report information using Microsoft Office applications. But in most cases, the data that is needed for analyses and reports originates in, or is analyzed by, systems and applications outside of the Microsoft Office suite.

Business analysts frequently need access to large data sources that exceed the limitations of Microsoft Office tools. They also may need access to sophisticated analytic techniques such as predictive analysis and forecasting capabilities that are not available in standard reporting packages. Yet they still need to present the results of their analysis in formats that others can share and understand.

As a result, IT groups spend valuable time developing custom systems to channel data, reports and analyses from various systems into Microsoft Office documents, or integrating analytics into standard reporting applications. This leads to IT backlogs, long wait times for reports and analyses, and invalid analyses based on highly aggregated data.

What if you could easily incorporate the powerful data management, analytics and reporting capabilities of SAS into your organization's widely used Microsoft Office tools? With SAS® Add-In for Microsoft Office, you can. SAS Add-In for Microsoft Office is a Component Object Model (COM) add-in to Microsoft Office that enables organizations to harness the power of SAS analytics and provides easy access to data directly from Microsoft Word, Excel and PowerPoint.

### Key benefits

- Provides business users with self-sufficient access to powerful SAS analytics from within Microsoft Office. SAS Add-In for Microsoft Office provides a self-sufficient, automated way to populate and maintain Microsoft Office spreadsheets and documents with information from corporate data stores or intelligence gained from advanced analytics. Custom analyses and reports created by analysts can be made available to business users from within Microsoft Office. It is the only add-in that provides fast, simple access to such powerful analytics from within the Microsoft Office environment.
- Makes consistent enterprise data from multiple platforms easily available to business users. Business users can be given broad access to all relevant data sources that SAS supports, even very large data repositories, from within Microsoft Office without custom interfaces or frequent IT intervention. Users can easily access and switch between enterprise data sources and control the amount of data that is loaded into their Excel applications. This reduces training costs and frees IT staff for more strategic projects.
- Offered as part of a comprehensive Enterprise Intelligence Platform. SAS is the only vendor with extensive integration into Microsoft Office as part of a wider, interoperable suite of business intelligence tools. With a common server platform and centralized management framework, organizations can create a collaborative domain. Information silos are eliminated, and information can be easily shared.

## Product overview

SAS Add-In for Microsoft Office is a Component Object Model (COM) add-in that enables business users to transparently leverage the power of SAS data access, reporting and analytics directly from Microsoft Office via integrated menus and toolbars. After arriving at the desired results, users can publish the Office documents to relevant decision makers using native Office functionality, and the recipients can update the embedded results from the Office documents on demand and as needed.

SAS Add-In for Microsoft Office is capable of accessing very large, server-based data sources (bypassing the traditional 65,536 row data size limit of Excel 2003), analyzing the data and returning results back to Microsoft Word, Excel or PowerPoint.

## Customized analysis and reporting

IT and business analysts can visually via SAS Enterprise Guide® or programmatically with other SAS components create programs that execute advanced analytics or basic analyses, or simply display data to produce charts and tables that can be shared with others who run them as a “black-box.” These programs, known as SAS Stored Processes, can be easily accessed by end users via a customizable “SAS Favorites” menu. SAS Add-In for Microsoft Office is the only add-in that makes custom analytics seamlessly available to business users from the Microsoft Office environment. In addition, SAS Add-In for Microsoft Office includes a variety of dialogs to guide users through common analytical tasks. These SAS Tasks enable users to execute analyses using the powerful capabilities of SAS without knowledge of the SAS language. Results can be refreshed from within Microsoft Office documents with a click of the mouse. Users can refresh

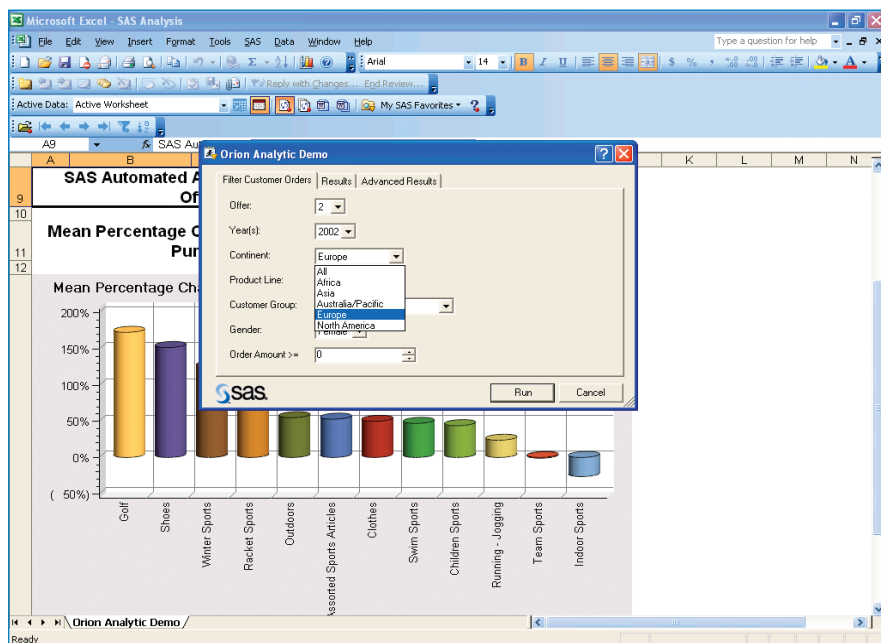
everything within their document or spreadsheet, which will rerun all the stored processes, update the data being browsed and replace the results using the newest data, or selectively refresh the results of one or more stored processes within the document – all without involving IT.

Business users are able to quickly access and update the tables, charts and analyses they need, and can be confident that their reports contain up-to-date information. Tabular results can be delivered as RTF (Rich Text Format) into Microsoft Word, as raw data (CSV) into Microsoft Excel, or as HTML into Microsoft Word, Excel and PowerPoint environments, for further manipulation with native Office functionality. Graphics can be tailored from within Microsoft Word, Excel and PowerPoint for delivery in SAS ActiveX, SAS ActiveX Image, GIF, JPEG or PNG formats.

## Data management

SAS Add-In for Microsoft Office enables Excel users to access and view SAS data sources or any data source available from your SAS server (including databases such as Oracle, Teradata and DB2), and analyze this data with SAS’ high-end analytics. Via an intuitive query interface that returns results directly into Microsoft Excel spreadsheets, users can preview and query large amounts of any data type supported by SAS servers.

Data sources larger than the size permitted by Microsoft Excel can be browsed several thousand rows at a time and analyzed (in full) with SAS Add-In for Microsoft Office via the power of the SAS server. This ensures that business users have the correct data detail needed for accurate analysis based on a complete set of records and removes the problems associated with intermediate summarized data formats, which



**SAS Add-in for Microsoft office enables business users to transparently leverage the power of SAS data access, reporting and analytics directly from Microsoft Office. It enables the use of dynamic, business-focused content designed and published by advanced analysts from SAS Enterprise Guide.**

are often subsets or aggregations of the detail data. SAS Add-In for Microsoft Office performs its processing on the SAS server, bypassing the data access limitations of Microsoft Office.

The Filter and Sort dialog makes it easy for users to reduce and organize results to acceptable sizes for their needs, and to identify the data to be inserted in Microsoft Excel. Results from various data sources can be delivered as raw data into Microsoft Excel for further manipulation with native Excel functionality.

Additionally, SAS Add-In for Microsoft Office allows users to refresh data automatically, as well as rerun any queries and apply relevant filters to ensure that the most up-to-date information is readily available. Users can switch dynamically between multiple data sources, enabling them to run multiple tasks with different data sources from within one worksheet or document. SAS Add-In for Microsoft Office allows full control over the maximum analysis result size that is returned to Office. An intuitive prompt is displayed, warning users whenever the result set to be returned is over the size limit they have set.

Because SAS Add-In for Microsoft Office references the business metadata created and maintained by modelers and query designers, business users are able to quickly and self-sufficiently access and utilize data stored in many remote systems and on varied platforms directly from within the Office environment without the help of IT. This eliminates IT's need to create custom applications or export data to intermediate formats (such as CSV and Tab delimited) and ensures consistent usage of data naming and business rules, making data access much easier.

## Key Features

### Customized analysis and reporting

- Leverage work published from ad-hoc analyses performed in SAS Enterprise Guide or from custom-written SAS code to develop analyses and reports that can be shared seamlessly as parameterized reports. These programs, known as SAS Stored Processes, can be shared easily and securely, bringing unprecedented analytic and reporting capabilities to the masses:
  - Easily browse all stored processes available to the user via a graphical user interface and execute on demand with the click of a button.
  - Execute almost any type of SAS analysis intuitively and appropriate to any business need. Prepackaged dialogs guide users with little or no SAS knowledge through common analytical tasks.
  - Refresh results of analyses within a document with a single mouse click. Users can either refresh all embedded analyses (which will rerun and return the results using the latest data) or selectively refresh the results of one or more embedded analyses within the document, all without involving IT.

### Data management

- View directly via Excel with a point-and-click query interface any data source that the SAS server can access.
- Publish Office documents to the SAS metadata repository and portal. With SAS Data Integration Studio, administrators also can perform impact analysis on data sources used downstream in these Office documents.
- Navigate through data sources larger than the 65,536-row application limit of Microsoft Excel 2003 easily and quickly via the SAS navigation toolbar.
- With server-side buffering capabilities, scroll through the result set in sections that are sized based on user-selected number of rows. Users can go directly to the end of the data source or select a specific range of observations to view.
- Reduce the data source being viewed via an intuitive Filter dialog, so users only browse pertinent data.
- Organize results for easy viewing in Microsoft Excel.
- Refresh imported data automatically (and rerun any queries and apply relevant filters) to ensure the most up-to-date information is available.
- Run multiple tasks with different data sources within one worksheet or document.

### General

- SAS Add-In for Microsoft Office is installed as an integrated menu option within Microsoft Word, Excel or PowerPoint, alongside other standard menus such as File, Edit, View, etc. It includes two SAS toolbars: SAS Data Analysis and SAS Analysis Tools.
- Users can organize common analytic and reporting tasks via the "SAS Favorites" menu so that they are readily available and easily accessible.
- Pivot Tables can be manipulated to illustrate multidimensional data from various sources.
- Results can be delivered as RTF (Rich Text Format) or HTML with Microsoft Word or PowerPoint, or as raw data (CSV) or HTML into Microsoft Excel, for further manipulation with native Office functionality.
- Graphics results can be delivered directly into Word, Excel or PowerPoint in any of these formats: SAS ActiveX, SAS ActiveX Image, GIF, JPEG or PNG. With SAS ActiveX graph controls, users have an extensive array of options to manipulate the appearance and type of graphs used once their results are returned from the server – without reprocessing the graph on the server.
- Users can view and modify existing analytic reports offline with native Office functionality and refresh results once online access is obtained.
- Excel-based SAS results can be exported directly to Word or PowerPoint from the SAS Add-In toolbar or menu.
- Users can control the size of report to be returned. An intuitive prompt is presented whenever the result set is over the size limit that has been specified by the user.

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## **SAS® Add-In for Microsoft Office Technical Requirements**

### **Client environment**

- Windows (x86-32): Windows 2000 Professional, Windows XP Professional

- Internet Explorer 5.5 and 6

Note: The required Microsoft .NET framework cannot be installed on 64-bit systems.

### **Server environment**

- SAS Add-In for Microsoft Office must connect to an environment running SAS BI Server or SAS Enterprise BI Server.
- Please refer to the SAS Enterprise BI Server Fact Sheet for a complete list of supported hardware systems, including Windows, UNIX, Linux and z/OS.

### **Required software**

- SAS Add-In for Microsoft Office is delivered as a component of SAS BI Server and SAS Enterprise BI Server.
- Microsoft Office 2000, Microsoft Office XP or Microsoft Office 2003.
- Microsoft .NET framework 1.1.  
The SAS offering includes MDAC 2.7 and the required Visual C++ components.



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