What’s New in SAS Drive 2.1

The following features and enhancements are introduced in this release of SAS Drive:

- The information pane has been redesigned to improve usability.
- You can create custom content tabs by right-clicking a folder on the All tab and selecting **Make this a tab**.
- You can close all of your search tabs at once by right-clicking any tab and selecting **Close all search tabs**.
- You can preview PDF documents.
- You can copy URLs to share direct links to reports by right-clicking a report and selecting **Copy link**.
- You can add recommended items to the **Quick Access** bar.

Introduction to SAS Drive

SAS Drive is a hub for SAS Viya applications that enables you to easily view, organize, and share your content from one place.

The availability of the features in SAS Drive depends on the applications that have been installed, and the features and permissions that have been specified by your administrator.

Access SAS Drive

To display a sign-in window, enter the URL provided by your administrator (for example, https://prod.host.com/SASDrive).

SAS Drive is always available from the side menu in the upper left.
Highlights of the SAS Drive Interface

1. The application bar enables you to access other SAS applications, view your notifications, update your settings, access help, and sign out of SAS Drive.

2. The toolbar enables you to create new content, search, undo and redo your changes, and access the SAS Drive main menu.

3. The **Quick Access** area provides convenient access to your most-used items. For more information, see "Quick Access and Favorites" on page 3.

4. The tabs bar provides different views of your content.

5. The canvas displays the contents of the tab, folder, or search that is currently selected.

6. The information pane displays details and comments for the currently selected item. For more information, see "Information Pane" on page 3.

The displayed tabs depend on the products that are installed at your site.

**My Folder** is a shortcut to `/SAS Content/Users/[userID]/MyFolder/`. 
Quick Access and Favorites

The Quick Access bar near the top of the interface is for storing your most-used items. To add an item to the Quick Access bar, drag it to the Quick Access bar, or right-click the item and select Pin to Quick Access.

You can add recommended items to your Quick Access bar by right-clicking the bar and selecting Add recommendations. SAS Drive selects recommendations based on the items that you have recently accessed in SAS Drive.

The My Favorites folder stores references to items. This is similar to saving bookmarks or favorites in a web browser. You can apply a filter to the My Favorites folder.

Landmarks

Landmarks are references to the primary areas of an application’s interface, and they provide keyboard users a quick way to navigate to these areas. Press Ctrl+F6 to open the Landmarks window.

Information Pane

The information pane displays details and comments for the selected item.

Details Tab

The Details tab displays detailed information about the selected item. Expand the headings to explore the information that is available.

The Attach button appears after you enter text in the comment field.

Comments Tab

You can add comments and attachments to an item. There is one level of reply. Comments are not included in searches.

Navigate to Other Applications

Use the side menu (≡) in the upper left to access other applications.

Do not use the Back button to switch between applications.
Indexing

Items that you create do not appear to other users or in search results until those items have been indexed. Indexing takes less than 5 minutes, depending on system load.

Working with Tabs

About Tabs

Each of the tabs in SAS Drive provides a different view of your content. The tabs that are displayed depend on your settings and your SAS deployment.

Here are some of the tabs that are available:

**All**
- displays all of the items that are available to you. This tab also contains special folders such as My Favorites, My Folder, and Recycle Bin. The Shared folder displays items that are shared with you or the items that you have shared with other users.

**Recent**
- displays any items that you have recently accessed in any SAS application.

**Projects**
- displays SAS Drive projects. For more information, see "Working with Projects" on page 5.

**Reports**
- displays all of the reports that you have access to.

**Search tabs**
- display the results of a search. Search tabs are marked with the icon.
  You can close all of your search tabs by right-clicking a tab and selecting Close all search tabs.

**Custom tabs**
- display the contents of a folder. You can customize the view by using filters. Custom tabs are marked with the icon.
  To create a custom tab, right-click any folder and select Make this a tab.
  To remove a custom tab, right-click the tab and select Remove tab-name tab.

**Note:** Moving SAS Model Studio projects in SAS Drive is not supported.

Manage Tabs

To hide a tab, right-click it and select Hide tab-name tab.

To change which tabs are displayed or the order in which tabs are displayed, right-click any tab and select Manage tabs.
The All and Recent tabs cannot be hidden. You also cannot hide custom tabs or search tabs.

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## Working with Projects

### What Is a Project?

A project is a shared repository for collaborative content and data. The contents of a project are tracked so that you can monitor activity and the history of changes within the project.

### Create a Project

To create a project, select the Projects tab and then click 🎨. Click the project name to rename the new project.

To change the image associated with a project, open the project and click the existing image. Select a new image and click Save.

**Note:** Only an owner of a project can change the project image.

### Add Members

To add members to a project, select the Summary tab of the project and click Members.

**Note:** Only an owner of a project can add members.

### Add Content

Go to the Content tab of the project and click Add Content.

When you add content to a project, a shortcut to that content is created in the project. Shortcuts are identified by an arrow (🪐) on the tile.

To remove a shortcut, right-click the item and select Remove from project.

You can also create folders in a project. Folders created in a project reside in the project, and can be removed by right-clicking the folder and selecting Delete.
Uploading and Downloading

Upload
To upload items, navigate to a folder where you have permission to place files, and then do one of the following:
- Drag files or folders from the file system and drop them onto the canvas.
- Right-click the folder and select **Upload**.
- Click ⌘ and then select **Upload ☰ File** or **Upload ☰ Folder**.

Download
To download an item, right-click it and select **Download**. Only some types of items (for example, PDF files, image files, and so on) can be downloaded.
Downloads are saved to the default location specified by the browser.

Sharing Items

Share an Item
Right-click the item and select **Share**. Specify the users or groups who you want to share with, and then specify whether to extend Read and Edit permissions to the recipients of the share.

Note: The ability to share an item depends on the authorization configuration for your deployment. By default, you can share items in **My Folder** and items that have been shared with you. If sharing is not available for an item, contact your system administrator.

Note: To share a SAS Model Studio project, use the sharing feature in SAS Model Studio. Sharing SAS Model Studio projects in SAS Drive is not currently supported.

View Sharing Settings for an Item
In the information pane, expand the **Shared With** heading of the **Details** tab.
Share Notifications

You are notified whenever someone shares an item with you. The bell icon (🔕) in the upper right of the interface displays the number of notifications that you have.

Click on the bell to see your notifications. Clicking a notification acknowledges it, but leaves it in the list.

Location of Shared Items

When someone shares an item with you from SAS Drive, the item appears in the All tab in the Shared folder.

Unshare an Item

1. Right-click the item and select Share.
2. Click the Edit icon (✏️) on the right.
3. Select the user or group, and then select Unshare.

Unsharing does not generate a notification.

Access to Unshared Items

If an item that you previously had access to is unshared with you, all shortcuts, favorites, and Quick Access references to that item are removed at the next browser refresh.

If the same item is subsequently shared with you, the previous shortcuts, favorites, and Quick Access references are restored.

Authorization to Share

See “Administration” on page 11 for information how to disable sharing and resharing.
Working with Tags

Add Tags
Tags enable you to apply one or more keywords to an item. Later, you can search for or filter for that tag.

Add tags to an item from the information pane, or perform these steps:

1. Right-click the item and select Tag.
2. Enter a tag and press Enter.

Previously applied tags are listed, and can be added to the current item by clicking the tag in the list.

Tags are automatically removed from the list of previously used tags when they are no longer associated with any item.

Inspect Tags on an Item
Either right-click the item and select Tag, or select the item and display the information pane.

Filtering and Searching

Filter
Filters are applied to the current tab and folder, and are available on all the tabs except Projects.

After entering an Item Name, press Enter to apply the filter.

Search
- Searches are applied across all tabs and folders.
- Searches inspect an item’s name, description, and tags, based on search operators. (See the following table.)
- Searches are not case sensitive.
- Searches return only items for which the current user has Read access.
The results of each search are presented in a new tab.
You can filter search results to further refine your search.

Table 1 Search Syntax

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>*</code></td>
<td>Matches any text.</td>
<td><code>apple*</code> ⇒ “applesauce”</td>
</tr>
<tr>
<td>[space]</td>
<td>A space is an implicit AND.</td>
<td><code>apple oranges</code> ⇒ both “apples” and “oranges”</td>
</tr>
<tr>
<td><code>&quot; &quot;&quot;</code></td>
<td>A word or phrase in double quotation marks returns exact matches.</td>
<td>“apple” ⇒ “apple” (but not “apples”)</td>
</tr>
<tr>
<td>OR</td>
<td>Combines two searches.</td>
<td><code>apples OR oranges</code> ⇒ either &quot;<em>apples</em>&quot;, &quot;<em>oranges</em>&quot;, or both &quot;<em>apples</em>&quot; and &quot;<em>oranges</em>&quot;</td>
</tr>
<tr>
<td><code>-</code></td>
<td>Excludes a word or negates an operator.</td>
<td><code>apples -bananas</code> ⇒ &quot;<em>apples</em>&quot; but not &quot;bananas&quot;</td>
</tr>
<tr>
<td>@</td>
<td>Finds items created by or last modified by a specific user. The user ID &quot;me&quot; is shorthand for the current user.</td>
<td><code>@cbab</code> ⇒ items created by or last modified by Charles Babbage. author:cbab ⇒ items created by or last modified by Charles Babbage. <code>@me</code> ⇒ items created by or last modified by the current user. author:me ⇒ items created by or last modified by the current user.</td>
</tr>
<tr>
<td>#</td>
<td>Finds items tagged with a specific tag.</td>
<td>#RedTeam ⇒ items tagged with &quot;RedTeam&quot;</td>
</tr>
<tr>
<td>TAG:</td>
<td>Searches only item names.</td>
<td>name:report ⇒ &quot;<em>report</em>&quot; within the item name</td>
</tr>
<tr>
<td>TYPE:</td>
<td>Searches only item types.</td>
<td>type:report ⇒ Report items</td>
</tr>
<tr>
<td>HAS:</td>
<td>Finds all items that contain the search query. This is the implicit search operator.</td>
<td>has:apple ⇒ &quot;<em>apple</em>, &quot;greenapple&quot;, &quot;apples&quot;, &quot;greenapples&quot;</td>
</tr>
<tr>
<td>NAME:</td>
<td>Searches only item names.</td>
<td>name:report ⇒ &quot;<em>report</em>&quot; within the item name</td>
</tr>
<tr>
<td>CREATEDBY:</td>
<td>Finds items created by a specific user ID. The user ID &quot;me&quot; is shorthand for the current user.</td>
<td>createdby:cbab ⇒ items created by Charles Babbage. createdby:me ⇒ items created by the current user</td>
</tr>
<tr>
<td>MODIFIEDBY:</td>
<td>Finds items last modified by a specific user ID. The user ID &quot;me&quot; is shorthand for the current user.</td>
<td>modifiedby:cbab ⇒ items last modified by Charles Babbage. modifiedby:me ⇒ items last modified by the current user</td>
</tr>
</tbody>
</table>

9
<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>( )</td>
<td>Parentheses group related searches.</td>
<td>apples (bananas OR cherries) ⇒ &quot;<em>apples</em>&quot; and either &quot;<em>bananas</em>&quot; or &quot;<em>cherries</em>&quot; (or both) name:(apples bananas) ⇒ both &quot;<em>apples</em>&quot; and &quot;<em>bananas</em>&quot; within the object name type:(report OR folder) ⇒ Report items and Folder items</td>
</tr>
</tbody>
</table>

### Copying a Report Link

You can create a URL link for a report that will open the report directly in SAS Visual Analytics or the SAS Visual Analytics App.

To create a link, right-click the report that you want to share, and then select Copy link. Configure the options for the link and then click Copy Link or select the URL in the text field and copy it.

**Note:** Depending on your browser settings, SAS Drive might display a message about access to the clipboard. If you see this message, then you should select and copy the URL from the text field in the Copy Link window.

### Opening and Previewing

Open an item by double-clicking it. Opening an item switches to the application that handles that type of content. For example, opening a report starts SAS Visual Analytics.

**Note:** SAS Drive can open only SAS Viya content and files that your web browser supports natively. For other file types, you can download the file before opening it.

Preview an item by right-clicking it and selecting Preview. Preview enables you to look at an item without opening the associated application.

To preview an item, you might need to disable browser pop-up blockers.

### Creating Links and Shortcuts

To create a link to another application or website, click ☑️ and then select New link.

To create a shortcut to another item (such as a report or folder), click ☑️ and select New shortcut.

To open a link, you might need to disable browser pop-up blockers.
Renaming Items and Shortcuts

In My Folder and wherever you have the appropriate permissions, you can rename items. You can also set new Quick Access names or favorites names.

Renamed Quick Access items, favorites, and shortcuts always reference the original item, even if that original is renamed.

Deleting Items

Deleted items are moved to the Recycle Bin. To undo a deletion, press Ctrl+Z or click .

From the Recycle Bin, you can restore an item to its previous location using the pop-up menu.

To permanently delete all items in the Recycle Bin, right-click it and select Empty Recycle Bin.

When you move an item to the Recycle Bin, any favorites or Quick Access items that reference that item are deleted. If you restore the item to its previous location, the favorites and Quick Access items are not restored.

Administration

Authorizations Editor

If you are signed in as an Administrator, you can view and edit sharing authorizations in finer detail by clicking the Authorization link in the lower left of the Share dialog box.

Push Content to Quick Access

Administrators can push items to the Quick Access area of individual users or groups.

Right-click the item, and then select Administer Quick Access.

To push multiple items, place them in a folder and then push the folder. You have the option to add the contents of the folder as individual Quick Access items.

Pushed items are references. If the pushed item is deleted, the Quick Access references are removed.

The push action is a one-time event, and users added to a group after a push will not have the items in their Quick Access area.
Control Access to the Copy Link Window

Administrators can prevent users from accessing the Copy Link window.

The settings are found in SAS Environment Manager under the All services view on the Configuration pane:

- **Copy Link Change Permissions**
  - If Copy Link Change Permissions is enabled, then users can grant permissions to the users that they share a report with.

- **Copy Link Enabled**
  - If Copy Link Enabled is enabled, then users can access the Copy Link window.

- **Copy Link Expiration**
  - Specifies an expiration date for any permissions that have been granted from the Copy Link window.

- **My Organization**
  - Specifies a group identity for access to shared reports. If a group is specified, then users can share reports with that group by selecting People in my organization with the link when managing permissions from the Copy Link window.

To modify these settings, follow these steps:

1. Sign in as an Administrator, and switch to Manage Environment.
2. Select Configuration (_configuration_icon_).
3. In the View drop-down list, select All services.
4. Select SAS Drive.
5. In the right pane, locate sas.drive and click (copy-link_button_).
6. Specify your settings, and then click Save.

Control Sharing and Re-sharing

Administrators can prevent sharing and the ability to re-share by using the reshareEnabled and sharingEnabled properties. See “Sharing: Details for Administrators” in SAS Viya Administration: General Authorization.

Control Uploads and Downloads

Administrators can selectively prevent users from uploading or downloading items.

The two settings are found in SAS Environment Manager:

/SASDrive_capabilities/allowUpload
  - If allowUpload is prohibited, a user cannot upload items.
Control the Availability of the Product Tour

Administrators can prevent the product tour from being displayed.

The settings are found in SAS Environment Manager:

/SASDrive_capabilities/allowWelcomeTour
  If allowWelcomeTour is prohibited, then the product tour is not displayed automatically when the user accesses SAS Drive

/SASDrive_capabilities/allowWelcomeTourMenu
  If allowWelcomeTourMenu is prohibited, then the product tour is not available from the main menu.

To disable either setting, follow these steps:

1. Sign in as an Administrator, and switch to Manage Environment.
2. Select Rules (⌘⌘).
3. Search for sasdrive.
4. Right-click the setting and select Edit.
5. Select the Principal type and, if appropriate, the Principal.
6. Change Rule Type to Prohibit.
7. Click Save.

Control the Creation of the Video Folder and Links

Administrators can prevent the creation of the /SAS Videos folder and also the links to the videos during account initialization. To prevent folder and link creation, users must not have previously signed in to their account.
The settings are found in SAS Environment Manager:

/SASDrive_capabilities/allowSASVideo
   If allowSASVideo is prohibited, neither the /SAS Video folder nor the Quick Access links are created for a first time user.

/SASDrive_capabilities/allowSASVideoLinks
   If only allowSASVideoLinks is prohibited, the /SAS Video folder is created, but the Quick Access links to the videos in the folder are not created for a first time user.

To disable either setting, follow these steps:

1 Sign in as an Administrator, and switch to Manage Environment.
2 Select Rules ( UIButton ).
3 Search for allowsas.
4 Right-click the setting and select Edit.
5 Select the Principal type and, if appropriate, the Principal.
6 Change Rule Type to Prohibit.
7 Click Save.

Migrated Content from SAS Home

Content that was migrated from SAS Home appears in /My Folder/SAS Home/.