



SAS[®] Enterprise Guide[®] 8.3 Explorer: Administrator's Guide

About SAS Enterprise Guide Explorer

SAS Enterprise Guide Explorer is a Windows application for network and PC administrators that serves as a central resource manager for SAS Enterprise Guide.

With SAS Enterprise Guide Explorer, you can complete these tasks:

- set up profiles and manage logins for users to access SAS resources using SAS Enterprise Guide
- identify SAS servers on multiple platforms
- define SAS folders
- define a configuration to access a specified SAS metadata server and deploy the configuration to other SAS Enterprise Guide users
- define the default settings for SAS Enterprise Guide options and use those settings when deploying SAS Enterprise Guide on other client machines

To open the SAS Enterprise Guide Explorer, double-click `SEGExplorer.exe` in the installation directory for SAS Enterprise Guide or SAS Add-In for Microsoft Office. An example path for SAS Enterprise Guide is `C:\Program Files\SASHome\SASEnterpriseGuide\8\SEGExplorer.exe`.

See Also

- [SAS Enterprise Guide and SAS Add-In for Microsoft Office: Administrator's Guide](#)

Deploying a Profile Configuration

Deploy a Profile Configuration

In SAS Enterprise Guide Explorer, you can use the Profile Deployment Wizard to deploy profile configuration information so that it is shared by all SAS Enterprise Guide users. When changes are made to the profile configuration, such as adding or changing profiles, those changes must be provided to all SAS Enterprise Guide users so that they can use the changed profiles. By storing the configuration information in a shared location and enabling SAS Enterprise Guide to automatically apply configuration changes, you can avoid manual configuration changes.

Note: Profile configurations are shared between SAS Enterprise Guide and SAS Add-In for Microsoft Office.

To deploy profile configurations to SAS Enterprise Guide users:

- 1 In SAS Enterprise Guide Explorer, select **Tools** ⇒ **Profile Deployment Wizard**.
- 2 Review the deployment steps. Click **Next**.
- 3 Verify the active profile. To change the active profile or define a new profile, click **Configure Profiles**. Click **Next**.
- 4 To test a connection for a profile, select a machine name from the table and click **Begin Test**. The table lists all machines in the current configuration. Click **Next**.

Note: All profile connections are tested.

- 5 Specify the location of the update file that contains all the configuration updates. This file must be accessible to all SAS Enterprise Guide users. Any changes to the profile configuration are written to the update file and automatically applied to all SAS Enterprise Guide users who have activated automatic updating. Click **Next**.
- 6 Specify the location of the configuration files. Typically, the location for these configuration files should be the same as the location of the update file. The configuration files are written directly to the location where SAS Enterprise Guide users access them to receive automatic updates.
 - The SDSUpdate.xml file contains the actual profile configuration information and is read by SAS Enterprise Guide to provide automatic updating.
 - The SDSControl.xml file is also distributed with the installation package for SAS Enterprise Guide, so you can save the configuration files in the location of your installation image.

Note: If you are in a testing environment, you can specify a different location for the update files. After you create the profile configuration that you want to use, you can manually copy the configuration files to the automatic update location.

Click **Next**.

- 7 Click **Finish** to create the profile configuration files.

Activate Automatic Profile Updates

After you create the profile configuration files, you can activate automatic profile updating in SAS Enterprise Guide. When automatic updating is activated, all profile configuration changes that you make in SAS Enterprise Guide Explorer are automatically applied to SAS Enterprise Guide.

Scenario 1: You Have Not Installed SAS Enterprise Guide on Client Machines

To make the profile configuration available to SAS Enterprise Guide users:

- 1 In SAS Enterprise Guide Explorer, select **Tools** ⇒ **Profile Deployment Wizard**.
- 2 Complete the steps in the Profile Deployment Wizard.

Note: When you specify the location of the SDSUpdate.xml file (in step 5 of the wizard), use the same network location that you specified for the shared update file (in step 4 of the wizard). This network location must be available to all SAS Enterprise Guide users.

- 3 Install SAS Enterprise Guide on client machines, including the SDSControl.xml file as part of the SAS Enterprise Guide custom installation. The SDSControl.xml file identifies the location of the SDSUpdate.xml file to each SAS Enterprise Guide installation. For more information, see [“Create a Shared Profile Deployment with Automatic Updates” in SAS Enterprise Guide and SAS Add-In for Microsoft Office: Administrator’s Guide](#).
- 4 Start SAS Enterprise Guide on a client machine and verify the following information:
 - a From the main menu, select **Tools** ⇒ **Connections**.
 - b In the Profiles pane, select the correct profile.
 - c In the navigation pane for the Connections window, click **Updates**.
 - d In the **Updates** pane, verify that **Update configuration automatically** is selected. Verify that the **Location of update file** box matches the location that you specified in the Profile Deployment Wizard.
 - e Click **Close**.

Scenario 2: You Have Already Installed SAS Enterprise Guide on Client Machines

To make the profile configuration available to SAS Enterprise Guide users:

- 1 In SAS Enterprise Guide Explorer, select **Tools** ⇒ **Profile Deployment Wizard**.

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- 2 Complete the steps in the Profile Deployment Wizard.

Note: When you specify the location of the SDSUpdate.xml file (in step 5 of the wizard), use the same network location that you specified for the shared update file (in step 4 of the wizard). This network location must be available to all SAS Enterprise Guide users.

- 3 Start SAS Enterprise Guide on a client machine and verify the following information:
 - a From the main menu, select **Tools** ⇨ **Connections**.
 - b In the Profiles pane, select the correct profile.
 - c In the navigation pane for the Connections window, click **Updates**.
 - d In the **Updates** pane, verify that **Update configuration automatically** is selected. Verify that the **Location of update file** box matches the location that you specified in the Profile Deployment Wizard.
 - e Click **Close**.

Set the Default Options for SAS Enterprise Guide

You can use SAS Enterprise Guide Explorer to create a set of default options for SAS Enterprise Guide. These options are saved in a file named EGOptions.xml, which you can then include in the SAS Enterprise Guide installation directory and apply each time SAS Enterprise Guide is installed.

To create a default set of SAS Enterprise Guide options:

- 1 In SAS Enterprise Guide Explorer, select **Tools** ⇨ **Customize Enterprise Guide Options**.
- 2 Specify the default values for the SAS Enterprise Guide options.
- 3 When you finish, save the file as EGOptions.xml.
- 4 Copy the EGOptions.xml file to the directory for the SAS Enterprise Guide setup image.

To update an existing EGOptions.xml file:

- 1 In the Customize Options dialog box, click **Open**.
- 2 From the Open File dialog box, select your existing EGOptions.xml file. When you open the EGOptions.xml file, the name of the dialog box changes to Customize Options - EGOptions.xml.

Import Task Definitions

You can use the Task Import Wizard to import task definitions into the active SAS Enterprise Guide repository. You must import the definitions for all of the SAS Enterprise Guide tasks that you want to administer.

Note: You do not need to import the task definitions for SAS Studio tasks.

After the task definitions are imported into the repository, use the role capabilities in SAS Management Console to specify which users have access to these tasks.

To import task definitions into the active repository:

- 1 In SAS Enterprise Guide Explorer, select **Tools** ⇒ **Task Import Wizard**.
- 2 Review the name and machine for the active metadata profile. You specified this active profile in the Connections window. Click **Next**.
- 3 Specify the location for the task information. SAS Enterprise Guide can search the standard locations for task definitions, or you can specify a task definition XML file. Click **Next**.
- 4 Review the search results. The Results area displays the number of tasks found on the machine where SAS Enterprise Guide is installed. The results also specify how many of those tasks have not been added to the metadata. Click **Next**.
- 5 Select the task definitions to import. Click **Next**.
- 6 Select the locale from which the task data should be extracted. You specified the list of available locales during the installation of SAS Enterprise Guide. Click **Next**.
- 7 Click **Finish** to add the selected tasks to the metadata.

Configuring the Server Connection

View the List of SAS Software Installed on a Server

The SAS Server Products window contains a list of SAS products and identifies which products are licensed and installed on the selected workspace server.

To view a list of SAS software installed on a workspace server:

- 1 In SAS Enterprise Guide Explorer, right-click the server name in the navigation tree and select **Properties**.
- 2 Click the **Software** tab, and then click **View SAS Server Products**.

View the Server Log

The SAS Log window contains the log that was generated when SAS Enterprise Guide connected to the selected SAS Workspace Server.

To view the log that is generated when connecting to a workspace server:

- 1 In SAS Enterprise Guide Explorer, right-click the server name in the navigation tree and select **Properties**.
- 2 Click the **Software** tab, and then click **View Initialization Log**.

Managing Libraries

Assign a Library

The libraries that are listed for a server in SAS Enterprise Guide Explorer are either assigned or unassigned. Unassigned libraries have had definitions created, but the libraries have not been assigned. The icons for assigned libraries are yellow, and the icons for unassigned libraries are white.

To assign a library, right-click the library name and select **Assign** from the menu.

Note: This option is also available from SAS Enterprise Guide.

Disconnect a Library

Note: Pre-assigned libraries and libraries that were enabled with the METAUTOINIT parameter cannot be unassigned.

To disconnect an assigned library, right-click the library name and select **Unassign**. The color of the library icon changes from yellow to white to indicate that the library has been disconnected.

To reconnect to the library, right-click the library icon and select **Assign**.

Note: Do not manually assign and unassign libraries on z/OS servers. Assigning a z/OS library locks out all other potential users of the z/OS data set with which the library corresponds.

Reset Logon

To reset the logon for a library, right-click the library name and select **Reset logon**.

When you connect to a library, you are prompted for credentials. Those credentials are stored in metadata so that they can be used later. The **Reset logon** option clears these credentials, so you are prompted for credentials the next time you connect to the library.

Note: You cannot use this option on libraries that have been assigned using the metadata LIBNAME engine (MLE).

Note: If the library is a DBMS library that is configured to use a shared default logon, selecting **Reset logon** clears the logon credentials for all users.

Working with z/OS Libraries

If you have libraries on z/OS servers, you must take precautions to keep these libraries accessible to users. When a z/OS library is assigned, the z/OS data set that corresponds to this library is locked for both Read and Write access to all other potential users. This condition occurs not only when a user manually assigns the library, but also when SAS Enterprise Guide users access the data interactively (for example, when running a task or viewing data).

To help keep your z/OS data accessible to all users, follow these guidelines:

- Do not manually assign and unassign z/OS libraries.
- Encourage SAS Enterprise Guide users to limit the time they spend on accessing z/OS data. Users should keep data navigating to a minimum and run tasks as quickly as possible. Whenever a task window or a data grid is open for z/OS data, that data is not accessible to other users.
- Make SAS Enterprise Guide users aware that access to z/OS data behaves differently from access to data on other servers. Even if all other users limit their access to z/OS data, there are still instances when a library is inaccessible because another user has already assigned the library.

Trace Metadata Transactions

You can make a record of all metadata that is sent to and received from the repository. This information is useful for locating and troubleshooting problems in the repository.

To use metadata tracing:

- 1 Select **Tools** ⇒ **OMS Trace** ⇒ **On**.

As you use SAS Enterprise Guide Explorer, SAS Enterprise Guide, or SAS Add-In for Microsoft Office, all metadata transactions are logged.

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- 2 To view the metadata trace at any time, select **Tools** ⇒ **OMS Trace** ⇒ **View**. The trace data is displayed as a set of metadata objects and is organized using a tree structure.

Note: Closing the window does not turn off the metadata trace.

- 3 To save the trace data, select **Tools** ⇒ **OMS Trace** ⇒ **Save As**. The trace data in the buffer is saved to an XML file.
- 4 To clear all of the trace data in the buffer, select **Tools** ⇒ **OMS Trace** ⇒ **Clear**. The trace starts over from the point when the buffer is cleared.
- 5 When you are finished with the metadata trace, select **Tools** ⇒ **OMS Trace** ⇒ **Off**. Tracing stops and the buffer is cleared.