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Summary: Lesson 7 - Customizing and Organizing Project Results

Topic Summaries

Combining Results in a Report

- When you create task results in SAS Report format, you can create a new report that combines the results of several different tasks, add text and images, and arrange the results using a grid. If you run your project and the task results change, the results are automatically updated in the new report.
- The report you create in the Report Builder is also in SAS Report format. Reports in SAS Report format are viewable in SAS applications, such as SAS Enterprise Guide, the SAS Add-In for Microsoft Office, Web Report Studio, and the Information Delivery Portal.
- To view the report outside SAS software, you can export it to HTML, PDF, or XML format.
- To create a custom SAS report, you use the Report Builder. In the New Report window, the **Select SAS items** pane provides a list of all SAS Report format results in the current project.
- You can drag and drop task results, images, and text to the position that you choose in the **Report layout** grid.
- After the report is created, it opens in normal view, showing the report as you designed it. The menus at the top of the report enable you to further customize the results. The **Modify Report** button opens the Edit Report window.
- The **Modify Report** drop-down menu enables you to insert additional text and images, remove page breaks, and apply the report style to all items in the report.
- The **Header & Footer** menu enables you to add a custom header or footer to the report and also to hide individual task titles or footnotes. The **Page Setup** menu enables you to change the page margins.
- In normal view, you can resize elements of the report by dragging the box corner. Sometimes you might need to switch back and forth between the two views until you get the items sized and the report formatted exactly the way you want it to print.
- The **Export**, **Send To**, **Publish**, and **Properties** menus should be familiar to you from other task results. A style can be applied to the entire report by selecting a style in the Properties window for the report.
- You can use the **Create** menu to create a snapshot of the report, that is, to generate a static version of the report that does not change. Although the task results are not updated in the snapshot, you can still add text and images to the report, change how the items are arranged in the snapshot, and modify the headers and footers.

Using Process Flows to Update Results

- In SAS Enterprise Guide, you can use multiple process flows in a single project to make it easier to navigate the contents of a project and run related tasks and queries. You can customize process flows by giving them descriptive names and changing their background colors to make them visually different.
- Creating and using multiple process flows is particularly useful when you need to run tasks or code in a specific order, run a subset of tasks regularly because of data updates and changes, or run tasks outside of SAS Enterprise Guide.
- In addition to adding new items to process flows, you can also move and copy objects between process flows. You can move an object by selecting the object and selecting **Move To** from the pop-up menu. When you move an object, SAS Enterprise Guide copies the shortcut to the associated data (if the process flow does not already contain it) and any existing results that are associated with the object. After your project is organized the way you want it to be, you can run the individual process flow or the entire project.
- If you name a process flow Autoexec, SAS Enterprise Guide prompts you to run the process flow each time you open the project.
- You can run an individual object, or you can select an object and run all items to the right of the selected object in the process flow by selecting **Run Branch**.
- One way to ensure that some tasks run before others is to change where the items in the project are located in the process flow. To arrange items in the process flow, you might need to open the pop-up menu in the process flow window and clear the **Auto Arrange** item.
- Another way to modify the sequence is to add user-defined links between project items to ensure that a particular task runs in a certain position. To create a user-defined link, you right-click the object that you want to link and select **Link To**. Then you can select the object that you want to link to from the list of project items.
- User-defined links are represented as dashed lines. Links that are automatically generated by SAS Enterprise Guide are represented as solid lines.

SAS Enterprise Guide 1: Querying and Reporting

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