Chapter 4
Customizing Your Session

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Chapter 4
Customizing Your Session

Introduction

You can customize your Analyst session from the **Tools** menu by selecting **Viewer Settings** . . . to set viewer preferences and **Graph Settings** . . . to set graph preferences. Any global options that you set are overridden by any individual settings that you specify in a task. These options are also overridden by options that are saved by the **Save Options** button for a task.

You can customize the toolbar by adding other Analyst tasks and icons. See Chapter 17, “Details,” for information about customizing the Analyst toolbar.

Setting Viewer Preferences

Select **Tools** → **Viewer Settings** . . . to display the Viewer Settings dialog. The Viewer Settings dialog enables you to specify options for the window layout, the data table, and the display of variables and output. When you click **OK**, your changes take effect immediately.

Window Layout

In the **Viewer** tab, you can control the relative size of the project tree and data table by moving the slider at the bottom of the **Window layout** screen.

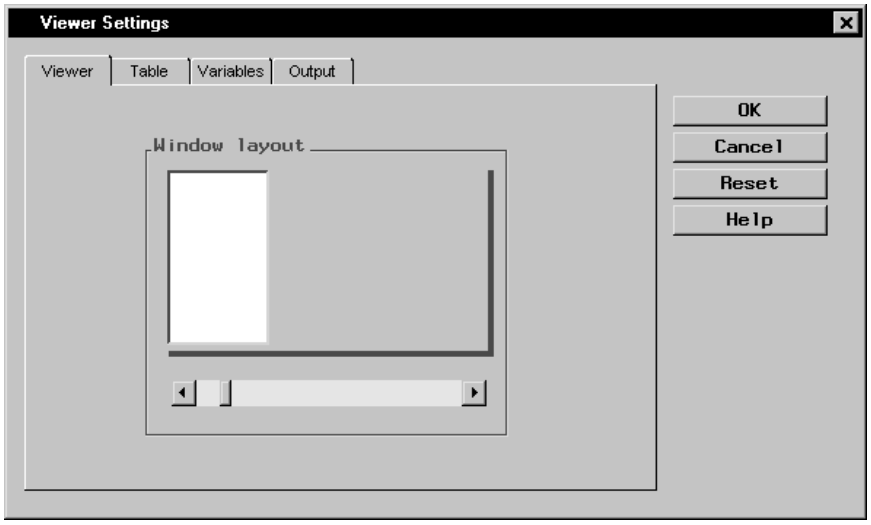

Figure 4.1. Viewer Settings Dialog, Viewer Tab

Table Settings

In the **Table** tab, you can specify the fonts and initial edit mode of your data tables.

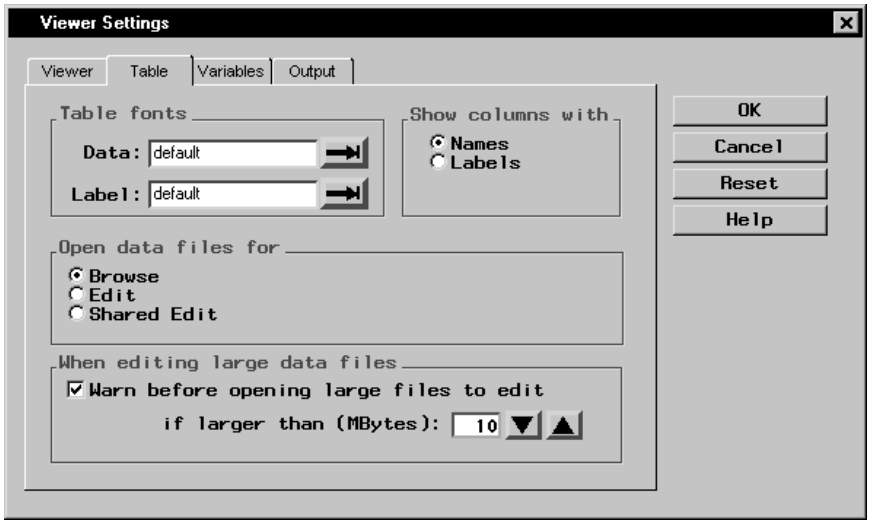

Figure 4.2. Viewer Settings Dialog, Table Tab

Under **Table fonts**, click on the arrows next to the **Data:** and **Label:** fields to select a font for the data and column headings in the data table.

Under **Show columns with**, select column **Names** or **Labels** to be displayed as column headings.

Under **Open data files for**, specify the mode in which data tables are to be opened. Browse mode prevents any editing of the table. Edit mode allows table editing, and Shared Edit allows multiple users to edit table values concurrently for tables that are accessed through a SAS/SHARE server. These modes can also be changed from the **Edit** menu when the data table is open.

Under **When editing large data files**, you can control processing speed by setting a warning for files that are greater than a certain size.

If you have checked **Warn before opening large files to edit**, and the file is larger than the limit you have specified, a message warns you that the data file is large and prompts you to either open a copy or open the data file directly. Opening a copy of the data file takes longer. Opening the data file directly is faster, but changes to the data table cannot be undone.

Click on the up or down arrows to specify the file size limit.

Settings for Variables

In the **Variables** tab, you can customize the display of the variables in the task dialogs.

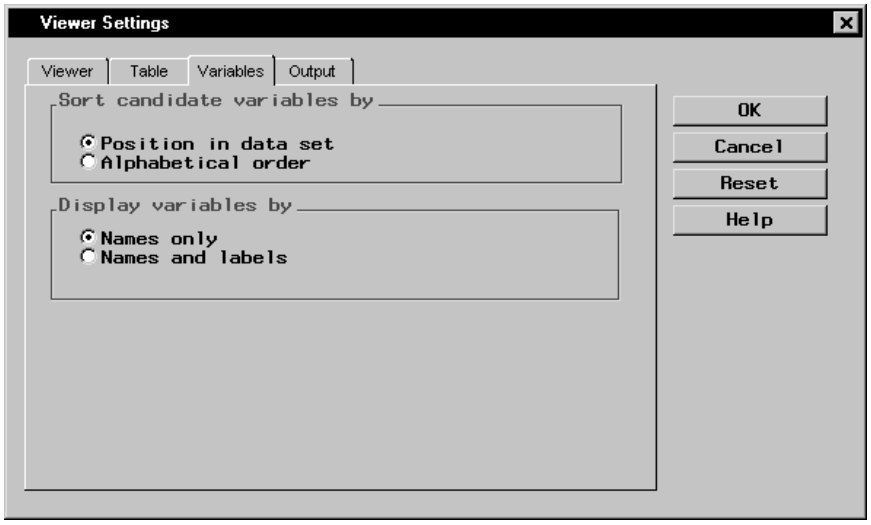

Figure 4.3. Viewer Settings Dialog, Variables Tab

Under **Sort candidate variables by**, select **Position in data set** or **Alphabetical order** to specify the order in which to list variable names in the task dialogs.

Under **Display variables by**, select **Names only** or **Names and labels** to specify how variables should be displayed in the task dialogs.

Output Settings

In the **Output** tab, you can specify options for multiple output, graphs, source code, and HTML files.

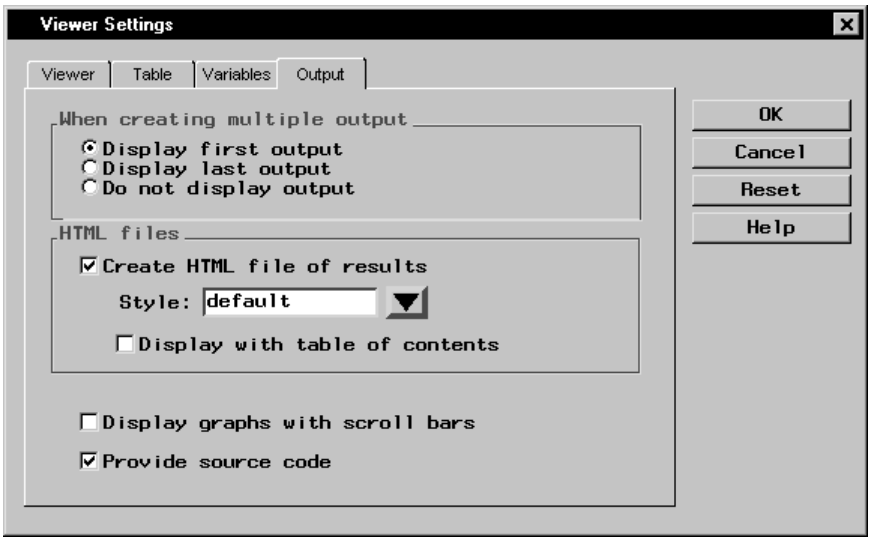

Figure 4.4. Viewer Settings Dialog, Output Tab

Under **When creating multiple output**, you can determine whether the first or last output should be displayed automatically when an analysis has been run, or whether output should be displayed at all.

Under **HTML files**, select **Create HTML file of results** to include an HTML output node in your project tree whenever you apply a task to your data. You can change the style of the HTML output by selecting a style from the **Style:** drop-down menu. Select **Display with table of contents** to view the HTML output using a table of links to your output (displayed with HTML frames). If this option is not selected, all results are displayed in a single page.

Select **Display graphs with scroll bars** to display scroll bars with your graphs. When scrollbars are displayed, graphs are shown in their natural size. When scrollbars are turned off, graphs are shown in full size in the Output window. Scrollbars can also be turned on or off in the Output window.

Select **Provide source code** to include a source code node in your project tree whenever you apply a task to your data.

Setting Graph Preferences

Select **Tools** → **Graph Settings** . . . to display the Graph Settings dialog. You can use the Graph Settings dialog to customize the appearance of the graphs you produce.

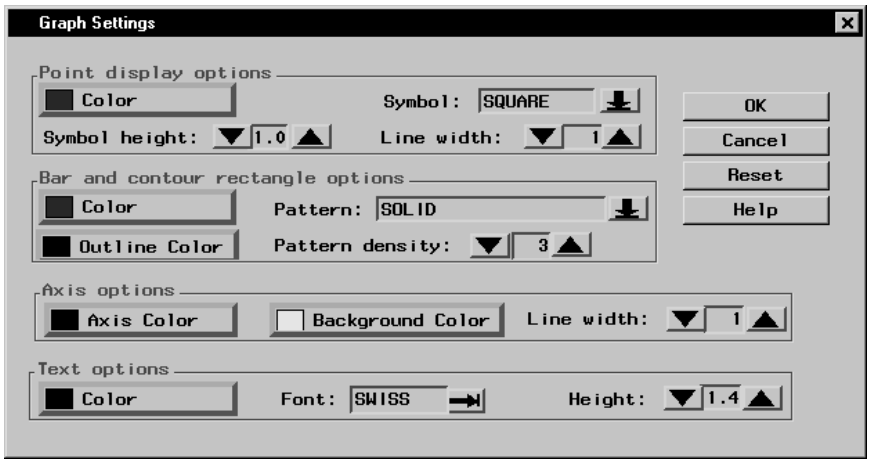

Figure 4.5. Graph Settings Dialog

Point Display Options

Point display options control the display of points and lines in plots. You can select the color, symbol type, and symbol height of points displayed in the plot. You can also control the color and width of lines in the plot.

Click on the **Color** button to change the color selected to display points.

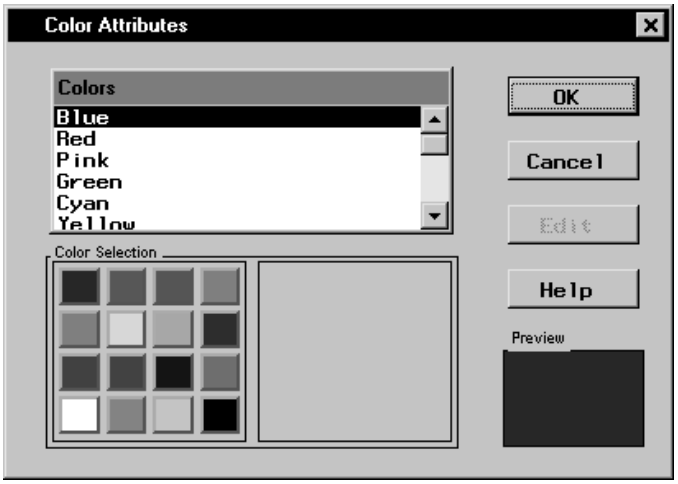

Figure 4.6. Color Attributes Dialog

Click on the arrow next to **Symbol:** to select the symbol used to display points.

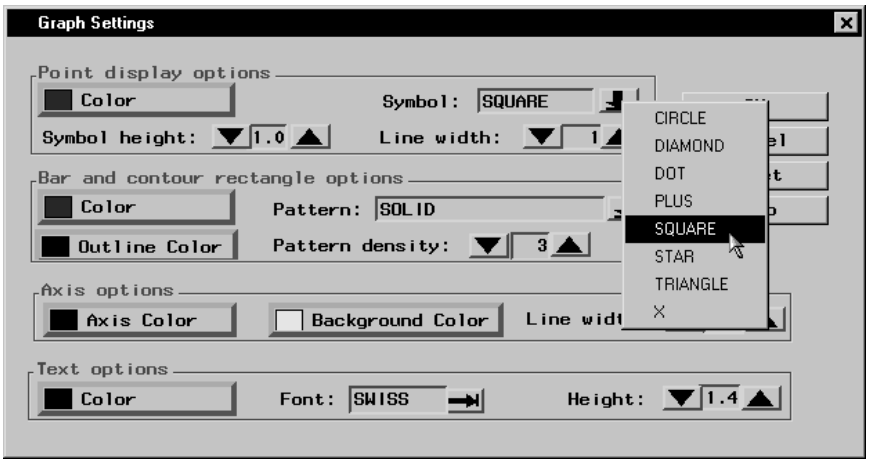

Figure 4.7. Point Symbols

Click on the down or up arrow next to **Symbol height:** to change the size of the symbol.

Click on the down or up arrow next to **Line width:** to change the width of lines displayed in the plot.

Bar and Contour Rectangle Options

Bar and contour rectangle options control the display of any bars or rectangles in graphs. You can control the outline color, the fill color, the fill pattern, and the pattern density.

Click on the **Color** button to select the color used to fill bars and rectangles.

Click on the **Outline Color** button to select the color used for bar outlines.

Click on the down arrow next to **Pattern:** to select a pattern used to fill bars and rectangles.

Click on the down or up arrow next to **Pattern density:** to change the density of the pattern.

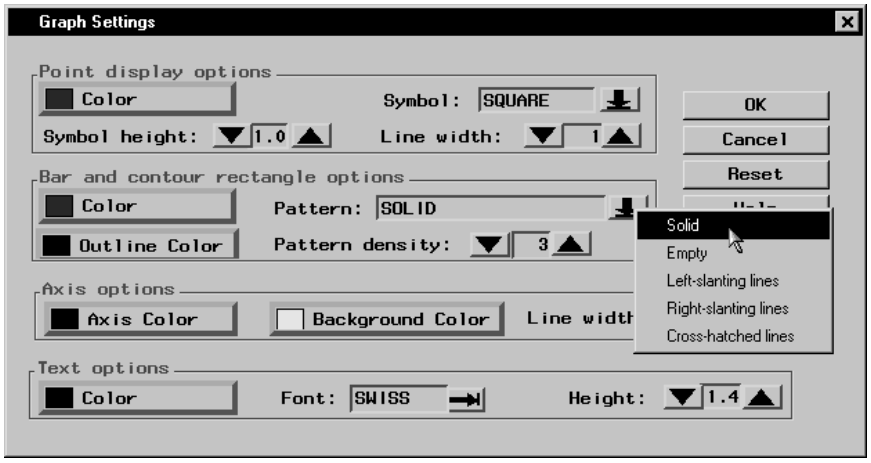

Figure 4.8. Pattern Choices

Axis Options

Axis options control the color and width of axis lines as well as the background color of the graph.

Click on the **Axis Color** button to select the color used for axis lines.

Click on the **Background Color** button to change the background color of the graph.

Click on the down or up arrow next to **Line width:** to change the width of the axis lines.

Text Options

Text options control the color, font, and size of any text in the graph.

Click on the **Color** button to change the color used for text.

Click on the arrow next to **Font:** to select a text font. Do not pick a font for which no sample text is displayed.

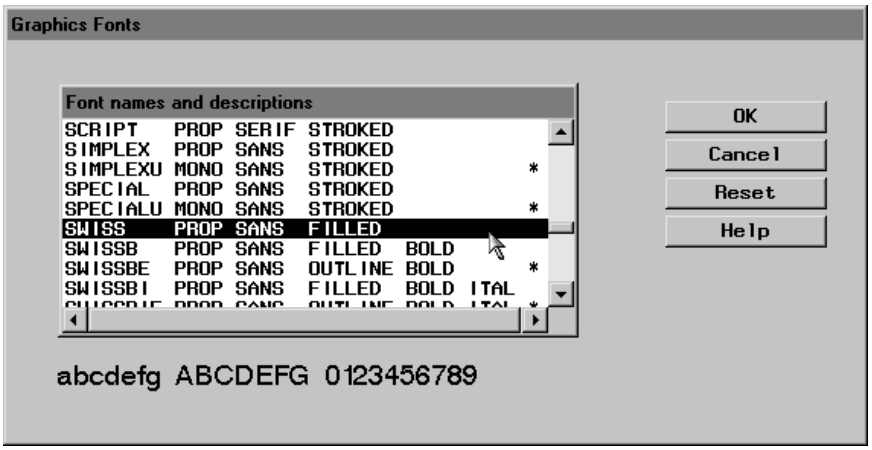

Figure 4.9. Graphics Fonts Dialog

Click on the down or up arrow next to **Height:** to change the text height.

Saving Options

You can save any option that is associated with a task by clicking on the **Save Options** button in the task dialog. For example, you can save the options that are associated with the Bar Chart task by clicking on the **Save Options** button in the Bar Chart dialog.

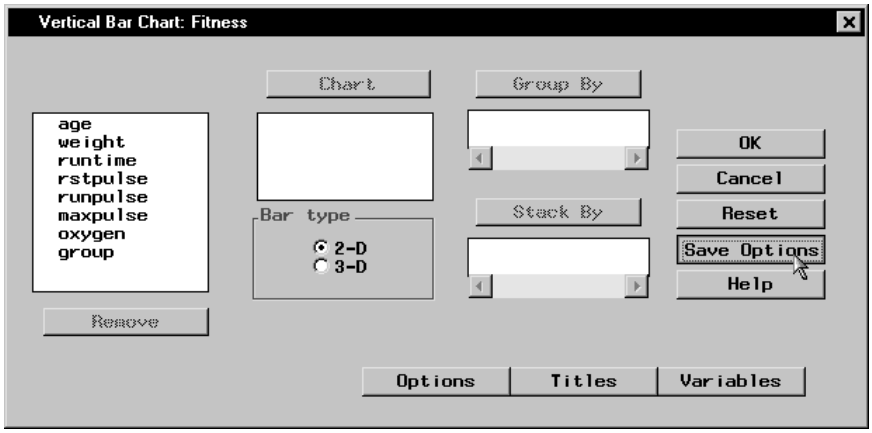

Figure 4.10. Save Options Button

These options become your defaults and are applied when you click on the **Reset** button. These options are also saved between sessions.

Options that are associated with data, such as **Group By** variables, cannot be saved with the task options, and do not persist between sessions.

Changing Titles

Select **Tools** → **Titles** . . . or click on the **Titles** button within a task to specify the titles that appear on the output.

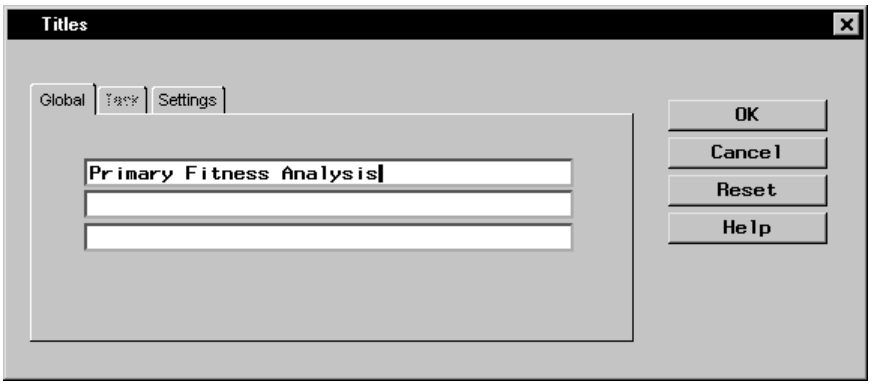

Figure 4.11. Titles Dialog, Global Tab

In the **Global** tab, you can specify titles that are displayed on all output. These titles are saved across Analyst sessions.

If you have selected the **Titles** button within a task, you can use the tab for the current task to specify titles for the output from the task. For example, if you are in the Summary Statistics task, you can specify the titles for the output from that task.

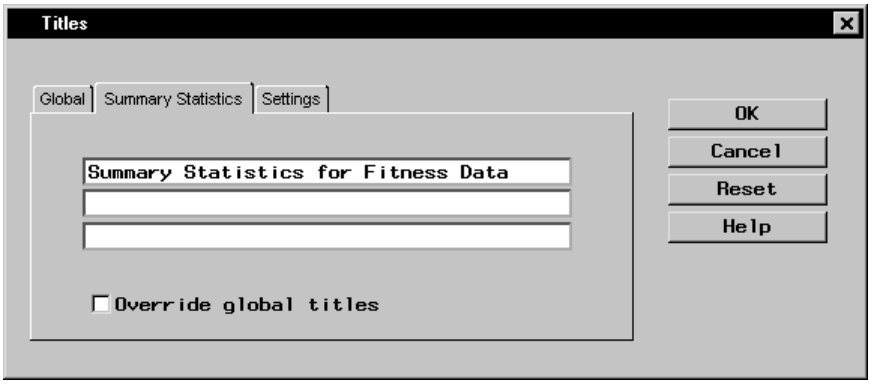

Figure 4.12. Titles Dialog, Task Tab

Select the box next to **Override global titles** to exclude the global titles from the task results.

In the **Settings** tab, you can specify whether or not to include the date, the page numbers, and a filter description.

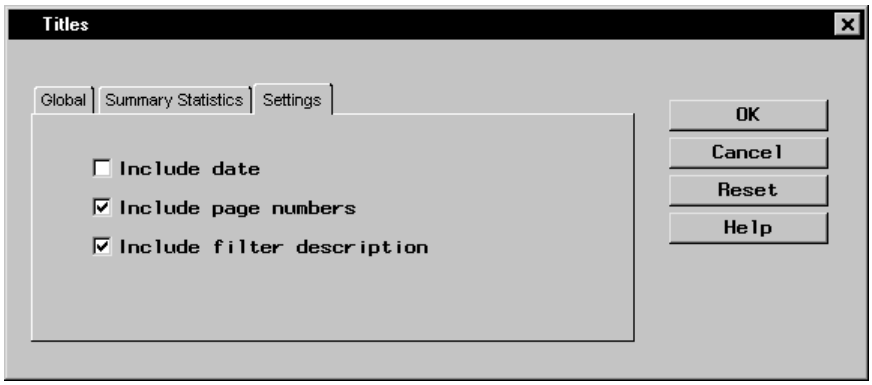

Figure 4.13. Titles Dialog, Settings Tab

Global titles information and settings are saved between SAS sessions.

Example: Change Global and Task Options

In this example, you change the viewer and graph settings, and the titles that appear on your output.

Change Viewer Settings

To change the window layout, open data files automatically in edit mode, display candidate variables in alphabetical order, and create HTML files of your results, follow these steps:

1. To change the window layout to make long node names easier to read, select **Tools** → **Viewer Settings** . . . Move the slider to the right so that the project tree is displayed in a wider window.

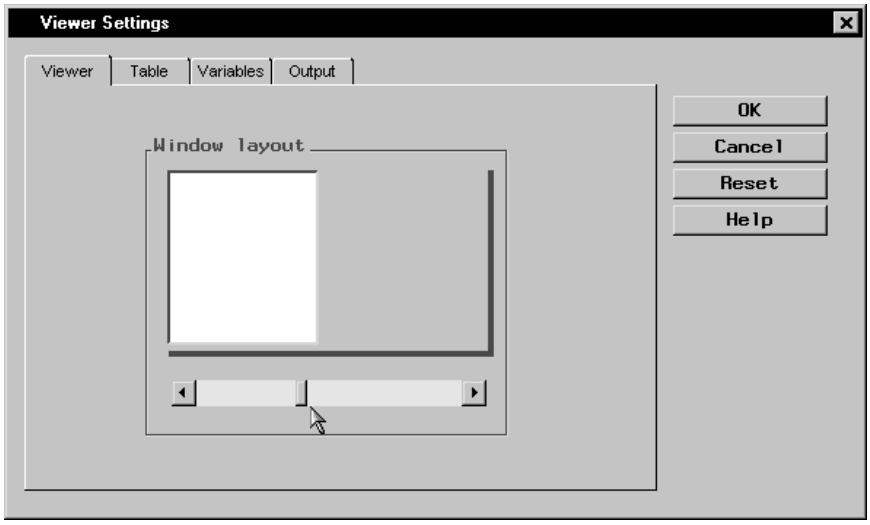

Figure 4.14. Wider Project Tree Window Setting

2. To automatically open data files in edit mode, select the **Table** tab, and select **Edit** under the **Open data files for** heading.

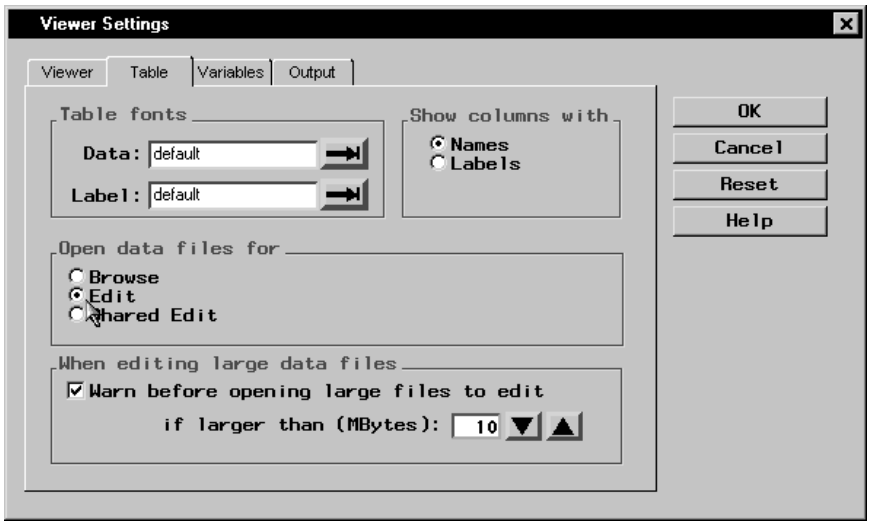

Figure 4.15. Open Data Files for Edit

3. To display the candidate variables in alphabetical order in a task dialog, select the **Variables** tab and select **Alphabetical order** under the **Sort candidate variables by** heading.

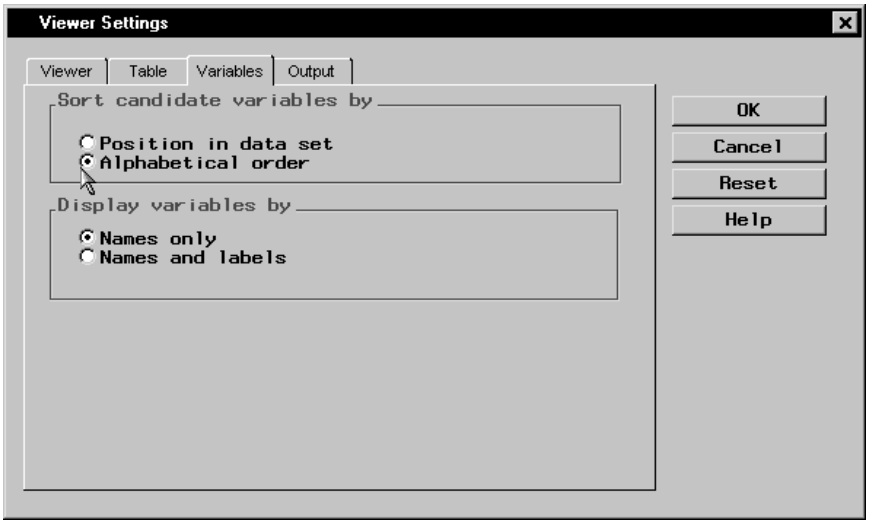

Figure 4.16. Sort Candidate Variables by Alphabetical Order

4. To automatically create HTML files of your results, select the **Output** tab and select **Create HTML file of results** under the **HTML files** heading.

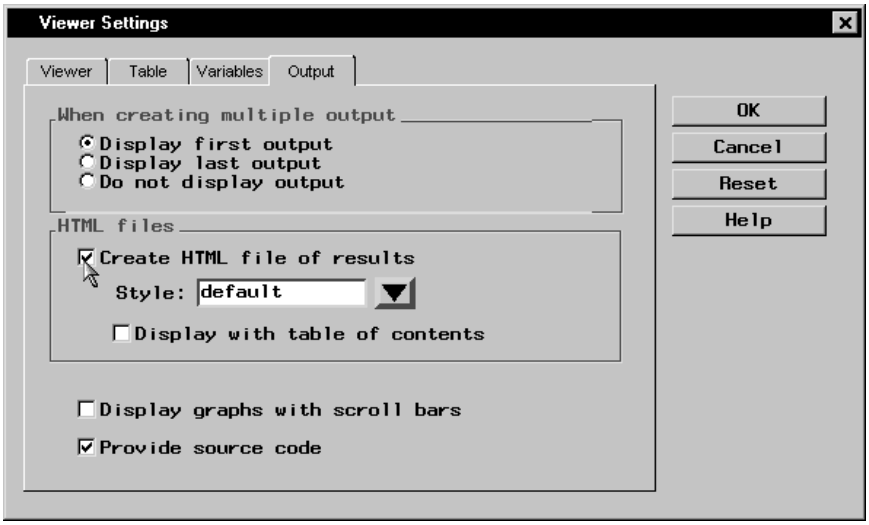

Figure 4.17. Create HTML File of Results

5. Click **OK** to save your viewer settings.

When you run an analysis, the HTML results are displayed as a separate node in the project tree.

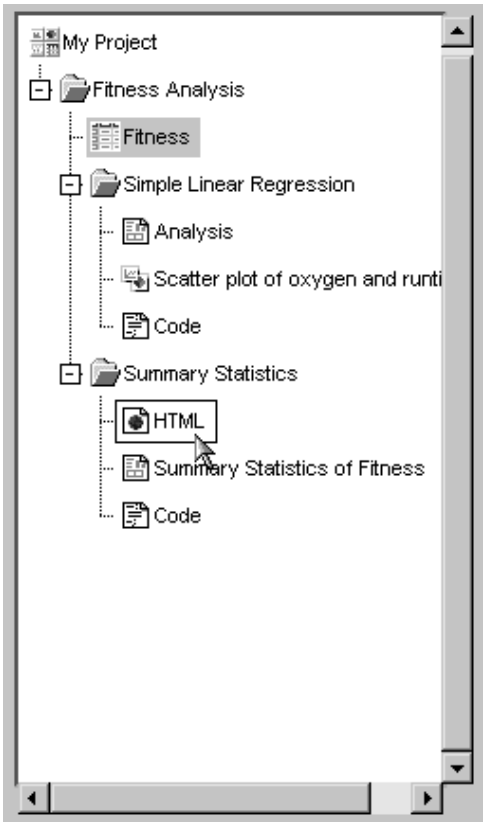

Figure 4.18. HTML Results Node

If you double-click on the HTML results, they are displayed in your HTML browser.

Change Graph Settings

To change the point and line display color and the bar and contour rectangle pattern in your graphs, follow these steps:

1. Select **Tools** → **Graph Settings** . . .
2. Select **Color** under **Point display options**.
3. Select **Magenta** from the list of colors.

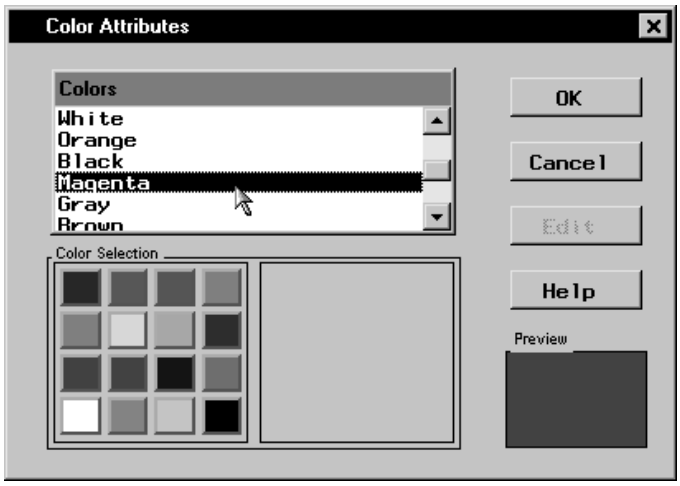

Figure 4.19. Select Point and Line Display Color

Click **OK**.

4. Under the **Bar and contour rectangle options** heading, click on the arrow next to **Pattern:** and select **Empty** from the list of patterns.

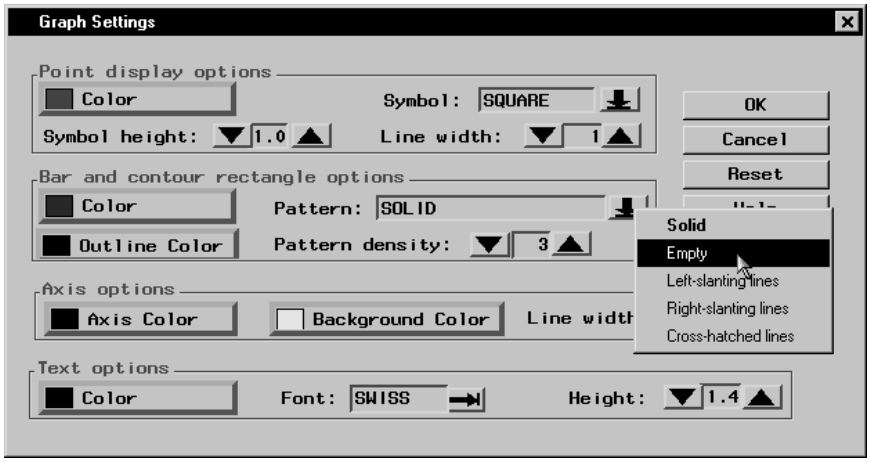

Figure 4.20. Select Bar and Contour Rectangle Pattern

5. Click **OK** to save your graph settings.

Change Titles

To specify a default title for all your output, follow these steps:

1. Select **Tools** → **Titles** . . .
2. Under the **Global** tab, type **Health Report** in the first field.

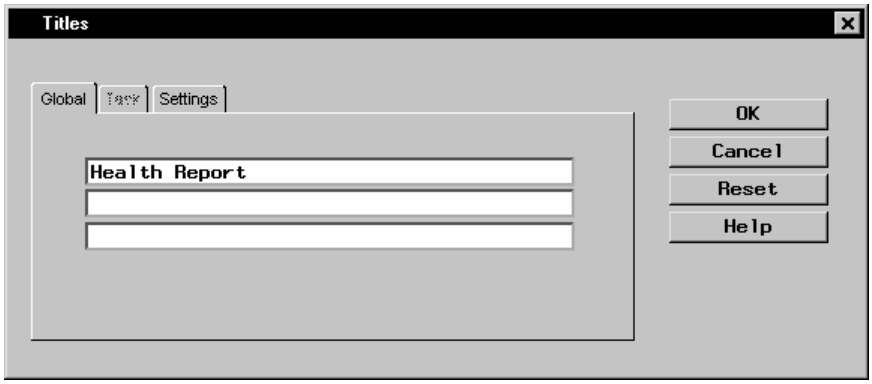

Figure 4.21. Specifying a Global Title

3. Click **OK** to apply this title to all subsequent output.

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