

Automating the Creation of Complex PowerPoints

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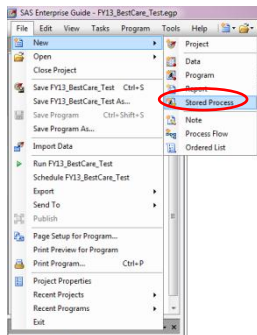
Abstract:

The creation of production reports for our organization has historically been a labor-intensive process. Each month our team produced around 650 SAS® graphs and 30 tables which were then copied and pasted into 16 custom PowerPoint presentations, each between 20 and 30 pages. To reduce the number of manual steps, we converted to using stored processes and the SAS® Add-In for Microsoft Office to run SAS® stored processes. SAS stored processes generate the graphs and tables while SAS Add-In for Microsoft Office refreshes the document with updated graphs already sized and positioned on the slides just as we need them. With this new process we are realizing the dream of reducing the amount of time spent on a single monthly production process.

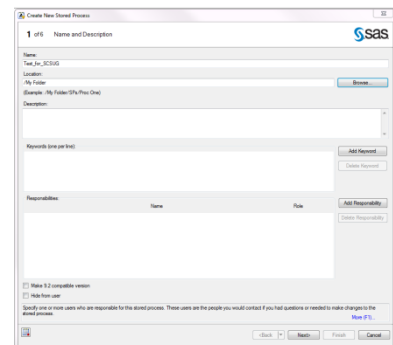
This paper will discuss the steps to creating a complex PowerPoint presentation that is simply refreshed rather than created new each month. I will discuss converting the original code to stored processes using SAS® Enterprise Guide®, options and style statements that are required to continue to use a custom style sheet, and how to create the PowerPoint presentation with an assortment of output types including horizontal bar charts, control charts, and tables. I will also discuss some of the challenges and solutions specific to stored process and SAS Add-In for Microsoft Office that we encountered during this conversion process.

The Basic Stored Process

The first step to creating a refreshable PowerPoint is to start with working SAS code. To work through this process, I have created a simple piece of code that modifies a SAS help dataset for use in graphics code that creates a multi series run chart. This code has been provided in the appendix to allow you to work through the example. Start by placing that code in a program within Enterprise Guide.

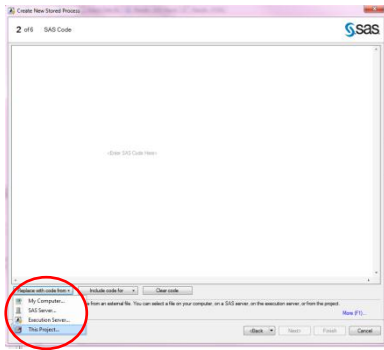


Select File -> New -> Stored process to create the stored process. This can also be done from the actual program in SAS Enterprise Guide under the create button. However, creating a stored process directly from code creates a link between the program and stored process. Once those pieces are linked each time you make a change you will be prompted to select the server or local code and asked if changes should be copied from one to the other.



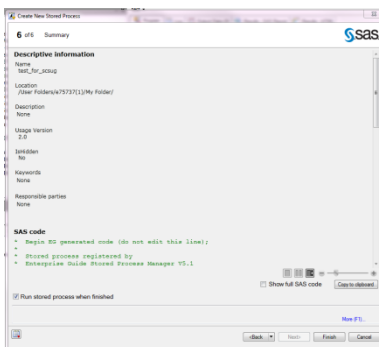
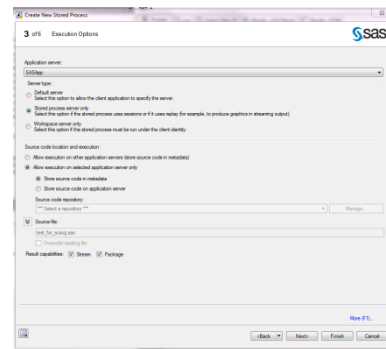
Now you will see the 'create stored process' interface. The first page allows you to define the name and location of your stored process as well as any description, keywords, or responsibilities that need to be associated with that code. I will rename my stored process to Test_for_SCSUG and leave the location as /My Folder. Then click Next.

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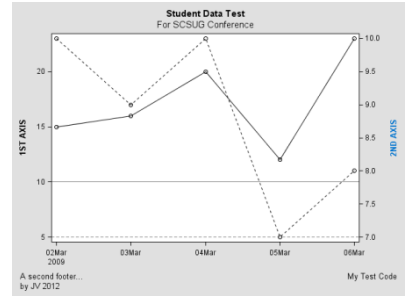
The second page opens a blank space for the SAS code to be placed. There are several choices to get your code into the stored process from simple copy/paste to using the stored process buttons. We will click the button 'replace with code from' and select 'this project'. This will bring up a selection box populated with all of the items that you have open within that SAS Enterprise Guide project. Select the program containing the test code that you copied in and click Open. This automatically pulls all of that code into the stored process code space.

The next step is identifying the method of stored process storage and where to execute the stored process. The choice of server type is depends on a number of factors. The stored process server uses a shared server ID to run the stored processes and will allow for multiple users. This allows for faster run times, however since this ID is shared by all users security could be an issue. On the other hand, the workspace server uses the individual client identity which restricts access based on individual permissions. Choosing this option will reduce any potential security risks, but will increase the startup time since it opens a new server process. For this exercise, we will choose the stored process server only. The final selection is a location and means of execution for the stored process. Since this is a test process, I will select allow execution on selected application server only and store source code in metadata. Select store source code on application server and define a repository for that code if you would like to create a backup file containing the stored process code. Finally, leave both stream and package options checked and SAS will determine the best method to return results. Stream allows SAS to return the results as they are generated, while package tells SAS to wait until all results are complete before returning them.



For this example we will skip pages 4 and 5 of the stored process wizard, there is no need for prompting or input data sources with this code. The final page provides a summary of the stored process you created; there is a check box to show the full SAS code for review. Click on the box to run stored process when finished and the finish to complete the process.

Once the stored process runs the following graph is created (your graph may appear differently if you have SAS Enterprise Guide set up with a different default style). Now that I have working output I can work on updating the style to match our corporate image.



Using a custom style with Stored process

The default style that stored process creates is functional, but not pretty. At our organization, we have developed a style template to create a unified style for all reports. To use this custom template with graphics code in a stored process several statements must be added.

Let's start with the %STPBEGIN and %STPEND macros. These are automatically added to your stored process by Enterprise Guide and sandwich your code unless you specifically call them within the code. The %STPBEGIN macro begins opens ODS for reporting and %STPEND closes it. These macros use a standard set of reserved macro variables to define the stored process options. To update options associated with the stored process, these reserved macro values have to be overwritten before ODS is initiated. Begin by wrapping the entire original code with the %STPBEGIN and %STPEND macro calls, next include the %GLOBAL statement at the top of the stored process with the reserved macro variables that need to be changed. Then a %LET statement must be used to reset the style name to the style, and a libname and ODS PATH statement must be used to provide direction to the location of the style sheet.

```

/* --- Reset reserved macro variables --- */
%Global _odsstyle ;

/*Reset the macro var to my style sheet*/
%Let _odsstyle = BestCareFY12;

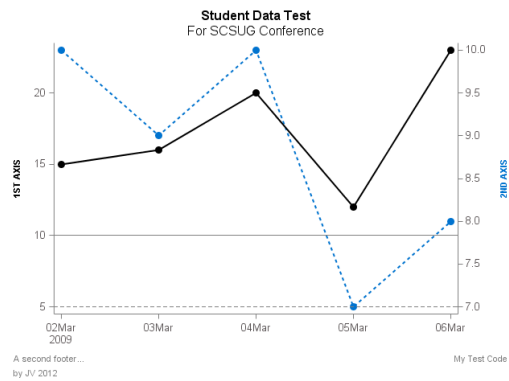
/*Define where to find the style template*/
libname test "\\my template storage location";
ods path(prepend) test.template(read);

%STPBEGIN;
    Original code from the stored process.
%STPEND;
    
```

Side Note:

Most stored process examples use the _stylesheet= option and a CSS style in order to create output with a customized style. This will work for some output, however for the graph elements to be passed into the stored process it must be from a SAS® style template. When creating a CSS sheet the graph selectors are not passed from template into CSS.

Now that the customized style is replacing the default the output is created based on my custom style definitions. This additional step creates a product that is more in line with our corporate style and will look great in our PowerPoint reports.

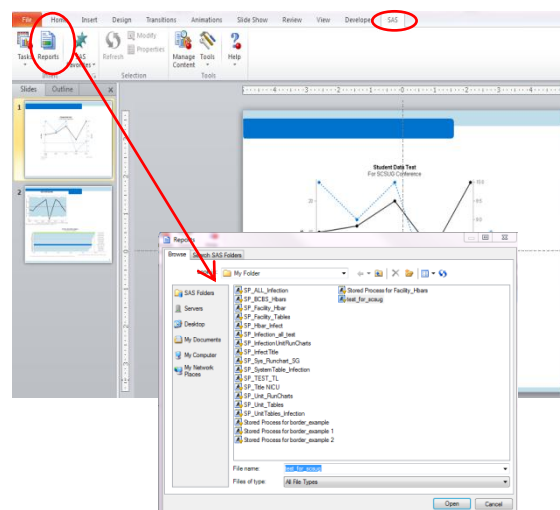


Creating the Customized PowerPoint

Side Note:

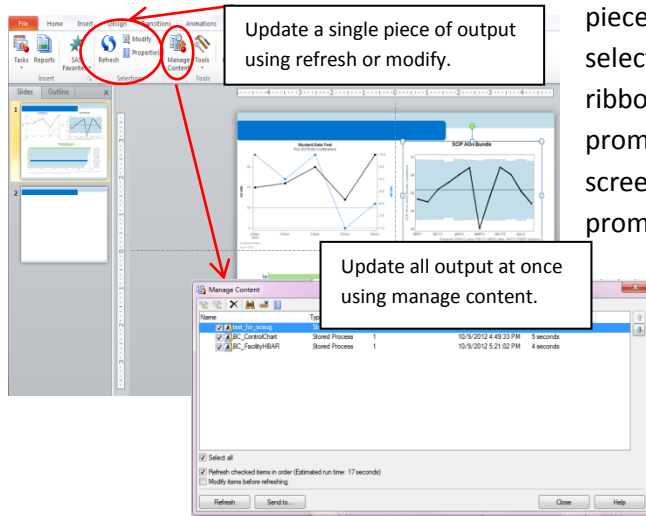
Before creating your PowerPoint, save the stored process is in its final home within the SAS folder structure. Currently there is no way to update the path from the SAS Add-In for Microsoft Office to change the location of the stored process. Therefore if you create a PowerPoint and then decide to change the stored process location you will have to recreate the PowerPoint.

Now that the stored process has been created to produce the desired output, we can begin creating a customized PowerPoint. To open new content into the PowerPoint, open the SAS tab on ribbon and click the reports button. This opens a navigation window which allows you to search through the SAS folders to the stored process of interest. Select the stored process and it opens into first open layout space in the PowerPoint. If there is no space on the current slide, the SAS Add-In for Microsoft Office will automatically open the output to a new slide.



To place multiple pieces of output on a single slide, you can either select a slide layout that meets your needs through the home tab on the ribbon or you can copy and paste output onto the slide you want. If you copy and paste, make sure you paste using the 'keep destination theme' option. This will preserve the link between the piece of output and the SAS toolbar and ensure the output remains refreshable. Once the output has been positioned correctly it will keep that positioning for any future refreshes. Even if the original output had to be resized or pieces of output had to be deleted the SAS Add-In for Microsoft Office will respect those changes during later refreshes.

Updating the content for monthly production is now an easy process with the SAS Add-In for Microsoft Office. There are several methods that you can use to refresh content. To update a single



piece of output, click on the piece of interest, then select either refresh or modify on the SAS tab of the ribbon. Refresh will update the output as is with no prompt changes, modify will bring up the prompt screen and allow you to change the stored process prompts before running. Updating all content at once is also simple, select manage content and select all stored processes within the presentation and hit refresh.

Adding customized tables to PowerPoint

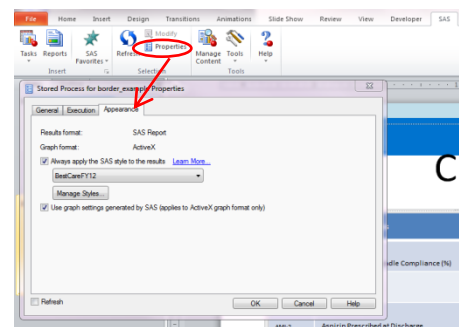
The biggest challenge that we have faced in creating customized reports in PowerPoint has been finding a method to automate printing custom tables in our reports. All of our reporting tables look similar to the one on the right, good performance is not highlighted at all, moderate performance has a light background change, and poor performance has both a background color and cell borders to focus attention. Once the table code was converted into stored process we could begin testing it in PowerPoint. Table 2 is the result the first time the table was created using the SAS Add-In for Microsoft Office, this image is created using the default PowerPoint style rather than the SAS style. To convert this back to the custom style, first select the table, then select properties from the SAS toolbar, go to the appearance tab and select 'always apply the SAS style to the results' and then select the custom style from the list.

	Measures	HOSP1	HOSP2	HOSP3
AMI AON	AMI All-or-None Bundle Compliance (%)	96.5%	90.9% (20/22)	98.0% (50/51)
AMI-1	Aspirin at Arrival	99.5%	95.2% (20/21)	100% (51/51)
AMI-2	Aspirin Prescribed at Discharge	98.2%	95.2% (20/21)	97.7% (43/44)

Table 1: Original Design

	Measures	HOSP1	HOSP2	HOSP3
AMI AON	AMI All-or-None Bundle Compliance (%)	96.5%	90.9% (20/22)	98.0% (50/51)
AMI-1	Aspirin at Arrival	99.5%	95.2% (20/21)	100% (51/51)
AMI-2	Aspirin Prescribed at Discharge	98.2%	95.2% (20/21)	97.7% (43/44)

Table 2: PowerPoint default



Side Note:

In order to see the custom style in the list of available SAS styles it must be added as an external style in Enterprise Guide. To do this, first run the style template and save it to the desired location. Then in Enterprise Guide select Tools-> Style Manager->Add... Then enter the style name and location as a new external style and hit ok. Now the custom style will be available both in SAS Enterprise Guide and the SAS Add-In for Microsoft Office.

Now that the style properties are updated, refreshing will update the image to incorporate the changes. Table 3 is the updated image that uses the custom defined style options. However, there is still

Measures		HOSP1	HOSP2	HOSP3
AMI AON	AMI All-or-None Bundle Compliance (%)	96.5%	90.9% (20/22)	98.0% (50/51)
AMI-1	Aspirin at Arrival	99.5%	95.2% (20/21)	100% (51/51)
AMI-2	Aspirin Prescribed at Discharge	98.2%	95.2% (20/21)	97.7% (43/44)

Table 3: Closer...but no cell borders.

something missing from this image. Not only are the big red boxes gone, but all of the cell borders are completely gone. For our reports, this is a big problem, and currently there is no way around it in PowerPoint. The cell borders were turned off by default in the product, and tech support is currently working on a fix for this issue. (YAY!!!)

To circumvent this issue we tried several options, the first was to use in-line styles to add a red dot to those low performing facilities. Table 4 is the result of adding a red dot when the table is output to html, however when the same table is run using the listing destination it appears like Table 4a.

Student Grades	Alfred	Alice	Barbara
Final Grade	49	87	49
Assignment 1	•28 (5.6/20)	98 (20/20)	•56 (11/20)
Assignment 2	•58 (17/30)	76 (23/30)	No Work
Assignment 3	62 (62/100)	86 (86/100)	92 (92/100)

Table 4: HTML output.

Student Grades	Alfred	Alice	Barbara
Final Grade	49	87	49
Assignment 1	28 (5.6/20)	98 (20/20)	56 (11/20)
Assignment 2	58 (17/30)	76 (23/30)	No Work
Assignment 3	62 (62/100)	86 (86/100)	92 (92/100)

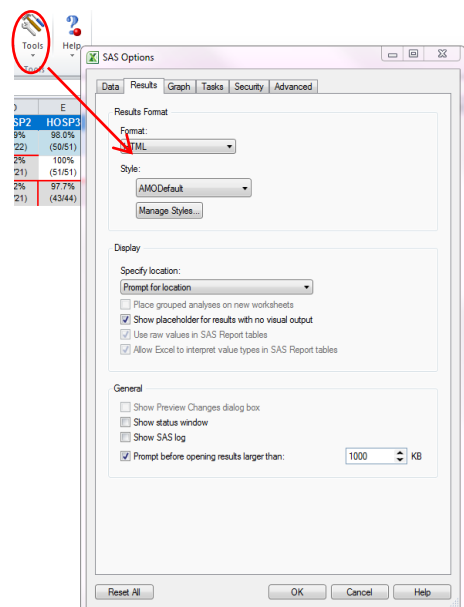
Table 4a: .SRX output

Unfortunately for us, the default output destination for PowerPoint is SAS Report XML or .SRX which is very similar to listing output. So the easy method of updating traffic lighting failed, and we are very committed to staying far away from traditional traffic lighting.

So since this was a PowerPoint issue, the first thought was to open the output into Excel and then insert it as an object into PowerPoint. Table 5 represents the product from opening the output with the correct style into Excel. It is definitely the closest to the original, however the big red box is not complete for any of the cells. The output destination for this stored process has been changed to HTML, but by default all output is brought into the SAS Add-In for Microsoft Office using the SAS report destination. To update this to HTML instead, on the SAS toolbar go to tools -> options -> results-> and update the format to HTML. This change requires a restart of Excel to take effect.

Measures		HOSP1	HOSP2	HOSP3
AMI AON	AMI All-or-None Bundle Compliance (%)	96.50%	90.9% (20/22)	98.0% (50/51)
AMI-1	Aspirin at Arrival	99.50%	95.2% (20/21)	100% (51/51)
AMI-2	Aspirin Prescribed at Discharge	98.20%	95.2% (20/21)	97.7% (43/44)

Table 5: Original Excel output.



Once that was done Table 5a was returned as output from the stored process. This output was the closest that we could get to the original. The final problem is the PROC REPORT border overwriting the outer cell borders. Currently we have no fix for this since the outer border has been turned off for PROC REPORT output. With no fix, this goes on the long term list and until the SAS fix comes out we continue to manually insert tables into all reports.

Measures		HOSP1	HOSP2	HOSP3
AMI AON	AMI All-or-None Bundle Compliance (%)	96.50%	90.90% (20/22)	98.00% (50/51)
AMI-1	Aspirin at Arrival	99.50%	95.20% (20/21)	100% (51/51)
AMI-2	Aspirin Prescribed at Discharge	98.20%	95.20% (20/21)	97.70% (43/44)

Table 5a: Final Excel output



Contact Information:

Follow the QR code to my blog to find more information about this topic, or email me at Julie.frick@baylorhealth.edu

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References:

Watts, Perry. Derby, Nate. Stakana Analytics, Elkins Park, PA; Using SAS® GTL to Visualize Your Data When There is Too Much of it to Visualize; SAS® Global Forum 2012 ([Paper 262-2012](#)).

SAS® Institute Inc. 2009. *SAS® 9.2 Stored Processes: Developer's Guide*. Cary, NC: SAS® Institute Inc.

SAS® Institute Inc. 2012. *Creating Business Intelligence for your Organization 1: Essentials Course Notes*. Cary, NC: SAS® Institute Inc.

Cynthia L. Zender. SAS® Institute Inc., Cary, NC; ODS Options and SAS® Stored Processes; SAS® Global Forum 2007. ([Paper 021-2007](#))

Appendix 1: Template Code

```

/*Appendix 1: Template Code*/
libname b_style "\\bhcs.pvt\dfsusers\Home\SAS Paper\TemplateTesting";
ods path(prepend) b_style.bhcs_styles(update);

proc template;

    define style styles.Baylor_core;

    parent= styles.Journal;

    style GraphFonts /
        'GraphTitleFont'=("Arial",12pt,bold)
        'GraphTitle1Font'=("Arial",10pt)
        'GraphLabelFont'=("Arial",10pt)
        'GraphLabel2Font'=("Arial",10pt)
        'Graphfootnotefont' = ("Arial", 8pt, extra_light)
        'GraphValueFont'=("Arial",10pt)
        'GraphDataFont'=("Arial ",8pt)
        'GraphUnicodeFont'=("Arial",8pt)
        'GraphAnnoFont'=("Arial",10pt);
    style colors/
        'docbg' = azure
    ;
    style GraphColors /
        'gaxis' = blue /*control x,y axis color*/
        'gwalls' = cxc2deea
        'gdata2' = CX0073CF /* System Data*/
        'gdata4' = pink
    ;

        class GraphTitleText /
/*changes the size and color of the graph title*/
        font=GraphFonts('GraphTitleFont')
        color= Orange
        ;
        class GraphFootnoteText /
/*changes the size and color of the graph footnote*/
        font= GraphFonts('GraphFootnoteFont')
        color=purple
        textalign=left
        ;

```



```

class graphlabeltext / /*changes the font and size of the axis
labels*/
    font=GraphFonts('GraphLabelFont')
    color=red
;
class graphvaluetext /
/*changes the color and font of data values on the axis*/
    font=GraphFonts('GraphValueFont')
    color= green /*changes the color of all axis values*/;

class graphbackground /
    backgroundcolor= colors ('docbg')
    color=colors('docbg')/*outside of graph area (behind x&y
values)background color*/;

class GraphWalls /
    linethickness = 1px
    linestyle = 1
    frameborder = off
    contrastcolor = GraphColors('gaxis') /*controls x&y axis color*/
    backgroundcolor = GraphColors('gwalls') /*controls background
color of graph*/
    /*color = GraphColors('gfloor')*/ /*overwrites background color
if both are used*/
;

class GraphDataDefault / /*controls the marker appearance, must be
within the template (markerattrs)*/
    markersize = 9px
    markersymbol = "circlefilled" /*Line marker style*/
    linethickness = 2 /*controls line thickness*/
    linestyle = 4 /*controls pattern of line*/
    contrastcolor = GraphColors('gdata2') /*control marker&line
color*/;
class GraphData1 /
    markersize = 9px
    markersymbol = "diamondfilled" /*Line marker style*/
    linethickness = 2 /*controls line thickness*/
    linestyle = 1 /*controls pattern of line*/
    contrastcolor = GraphColors('gdata4');

end;
run;

proc template;
define statgraph b_style.baylor_RUNCHART ;
dynamic title1 title2
    foot1 foot2 foot3
    _YAXIS _yaxis2
    xvalue yvalue
    x2value y2value
    y_label x_label;

```

```

begingraph /border=false;
entrytitle title1 /textattrs= Graphtitletext(weight = bold);
entrytitle title2 /textattrs= Graphtitletext(weight=normal);
entryfootnote halign= right foot1
                halign=left foot2 / textattrs=graphfootnotetext;
entryfootnote halign= left foot3 / textattrs=graphfootnotetext;

layout overlay /
    yaxisopts = (label = _YAXIS
                display=(ticks tickvalues label line)
                labelattrs = graphlabeltext)

    xaxisopts= (display =( ticks tickvalues line))

    y2axisopts = (label = _yaxis2
                 display=(ticks tickvalues line label)
                 labelattrs = graphlabeltext);

seriesplot x= x2value y= y2value /primary=true
            connectorder=xvalues display=all
            yaxis=y2
            lineattrs= GraphDataDefault(pattern=shortdash)
            markerattrs= GraphDataDefault ;

seriesplot x= xvalue y=yvalue / primary=false
            connectorder=xvalues display=all
            yaxis=y
            lineattrs= GraphData1
            markerattrs=GraphData1;

```

Appendix 2: Stored Process Code

```

/* --- Start of code for "Graph Code". --- */
%Global _odsstyle _odsoptions ;

*Process Body;

/*Find the style sheet*/
%Let _odsstyle = styles.baylor_core;
libname b_style
"\bhdasas02\apps_data\SASResources\Styles\Output\Prod\StyleTemplates"
;
ods path(prepend) b_style.bhcs_styles(update);

/*CREATE DATA WITH A REP_PERIOD_DATE, 2 METRICS FOR REPORTING, AND
METRIC CODE*/
Proc sql;
    create table scsug_test
    as select
    count as metric_value,
    day as rep_period_date,
    case
        when process = 'Process A' THEN metric_value
        else .
    end as Metric_1,
    case
        when process = 'Process B' THEN metric_value
        else .
    end as Metric_2,
    10 as ref1,
    5 as ref2
from SAShelp.failure;
quit;

proc sort data= scsug_test;
    by rep_period_date descending metric_1 metric_2;
run;
Data scsug_test2;
    set scsug_test;
    by rep_period_date descending metric_1 metric_2;
    if first.rep_period_date = 1 or last.rep_period_date = 1;
run;

%stpbegin;

```

```
proc sgrender data=scsug_test2 template= b_style.baylor_RUNCHART;
  dynamic
    title1 = "Student Data Test"
    title2 = "For SCSUG Conference"
    foot1 = "My Test Code"
    foot2 = "Graph template available in SGF proceedings"
    foot3 = "by JV 2012"
    _Yaxis = "Axis 1 Label"
    _yaxis2 = "Axis 2 Label"
    xvalue = 'REP_period_date' yvalue = 'metric_1'
    X2value = 'REP_period_date' y2value = 'metric_2';
run;
%stpend;
/* --- End of code for "Graph Code". --- */
```