

# Create Report with SAS Visual Analytics to Finish Your SAS Story (BB069)

Shinya Kodama is a senior data solutions developer experienced in delivering efficient technical solutions. In his professional career, Mr. Kodama has proven himself expert in SAS and SQL; but he is also an effective generalist with technical proficiencies in designing databases and implementing applications. In addition, he is well versed in analyzing data, understanding business processes, and solving problems. Mr. Kodama provides technical guidance with regard to design and deployment of custom-built data delivery solution to clients and peers. He works closely with technical and business users, as well as the leading a team, to identify business needs, build requirements, and efficiently fulfill them.

Mr. Kodama holds BS in Business Administration Quantitative Methods from the University of Illinois at Chicago and a certificate in Database Technologies from DePaul University. He enjoys playing sports, as well as guitar and piano.



# Create Report with SAS Visual Analytics to Finish Your SAS Story (BB069)

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NORC



# Overview

- Using **Left** and **Right** Panes to Add Contexts to Report



# Left vs Right

- Left Pane

- Data Related Tasks

- **Data** - Select a data sources and the data items for your report.
      - “*Actions*” icon beside the data source name field provides tool to link two data sources as well as join to add variables from another data.
    - **Objects** – Select what type of report – list tables, graphs, list, etc. - user wants to create.
      - Objects also provides variety of “Controls” (or filters) to manage presentation of page or report.

- Right Pane

- Presentation Related Tasks

- **Options** – Enables you to add specific formats and styles for selected object.
    - **Roles** – Assign variables from data to selected object.
    - **Actions** - Create links across page and report.
    - **Rules** – Add visuals to object highlighting specified values



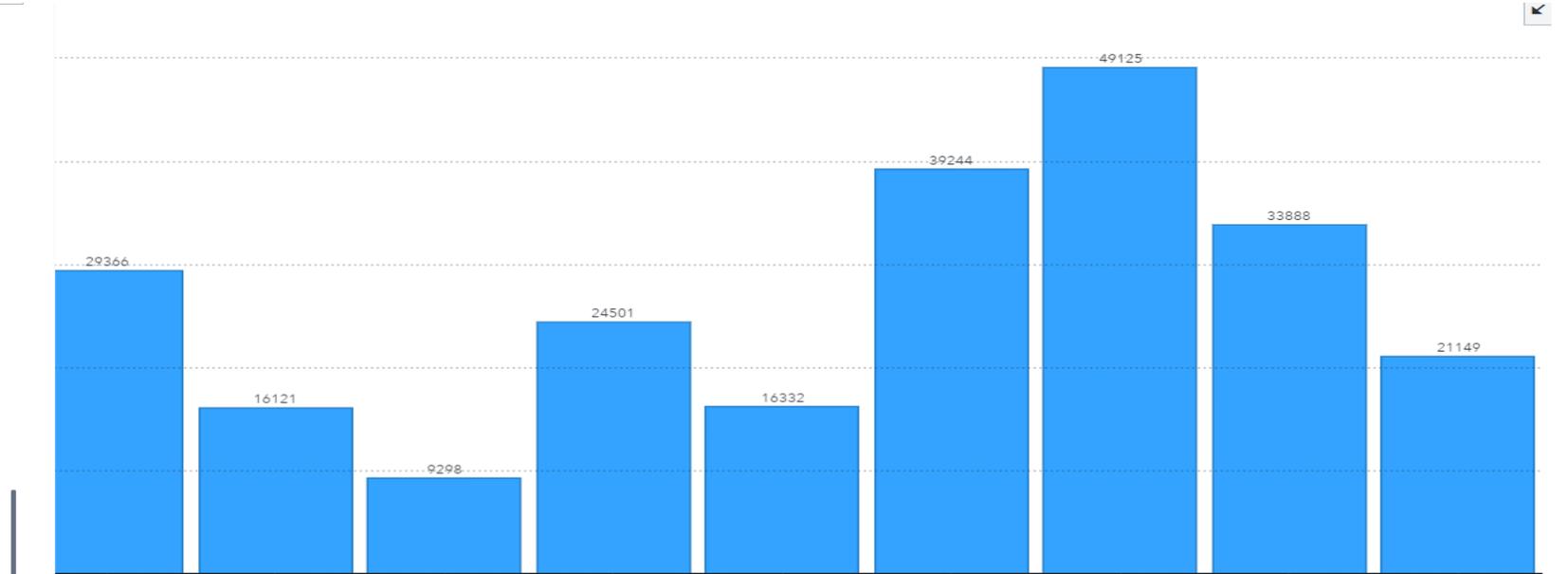
# Left Pane - Objects

## Left Pane

### 1. Objects

Objects

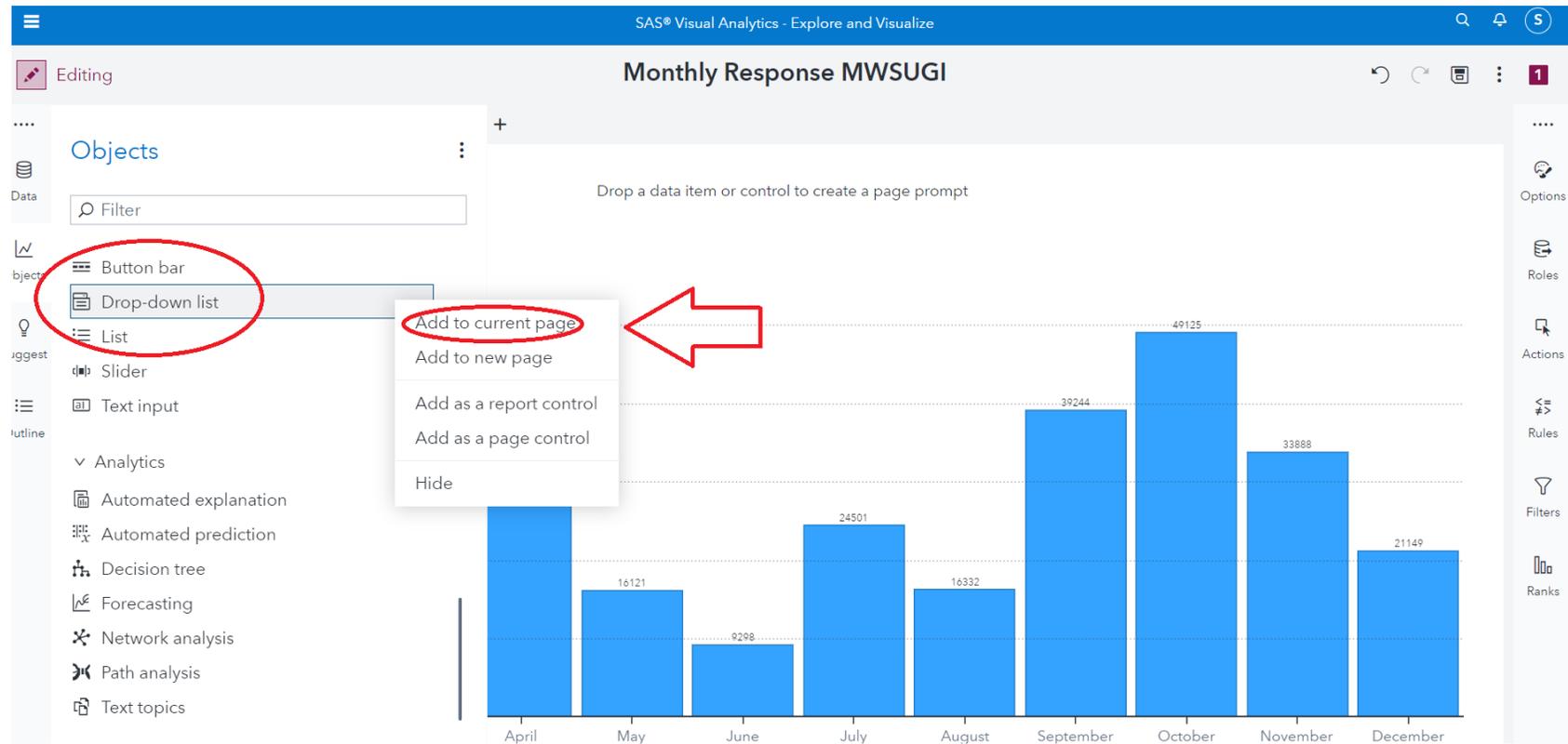
- Controls
  - Button bar
  - Drop-down list
  - List
  - Slider
  - Text input
- Containers
  - Precision container
  - Prompt container
  - Scrolling container
  - Stacking container
  - Standard container
- Content



# Left Pane - Objects

## Left Pane

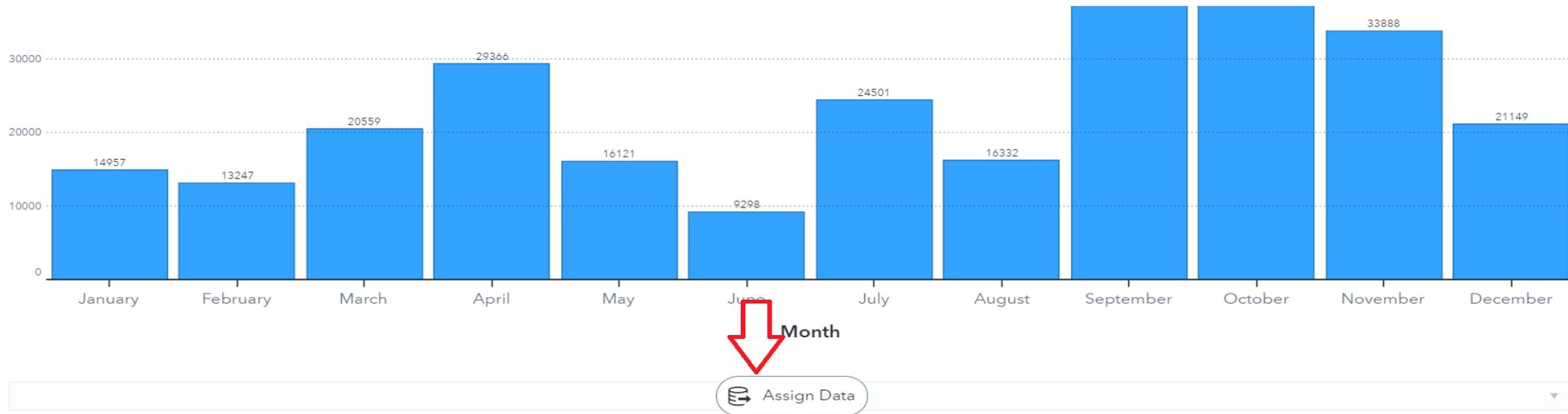
1. Objects
  1. Drop-down list



# Left Pane - Objects

## Left Pane

1. Objects
  1. Drop-down list
    1. Add to Current Page



# Left Pane - Objects

## Left Pane

### 1. Add to Current Page (Continued)

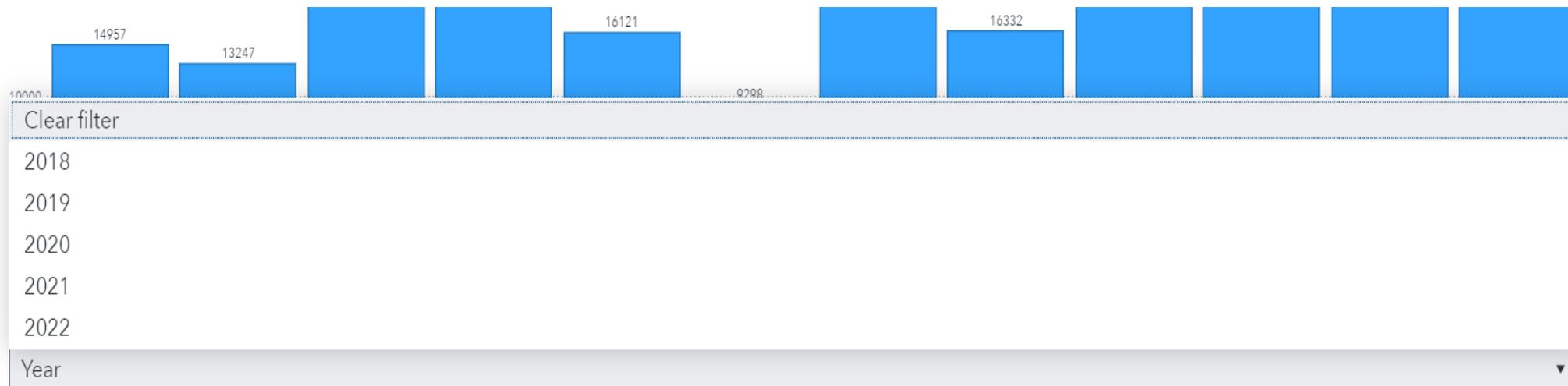
The screenshot shows the 'Add Data Item' dialog box. On the left, there is a search bar labeled 'Filter'. Below it, a list of data items is displayed: 'curr\_contract - 2', 'Date - 60', 'Month - 12', 'new\_date - 60', 'tot lic usage - 1', and 'Year - 5'. The 'Year - 5' item is circled in red, and a red arrow points to it. A 'Cancel' button is located at the bottom right of the list. On the right side of the dialog, there are three sections: 'CATEGORY \*', 'MEASURE', and 'PARAMETER'. Each section has a '+ Add' button. The '+ Add' button in the 'CATEGORY \*' section is circled in red. A 'Close' button is located at the bottom right of the dialog.



# Left Pane - Objects

## Left Pane

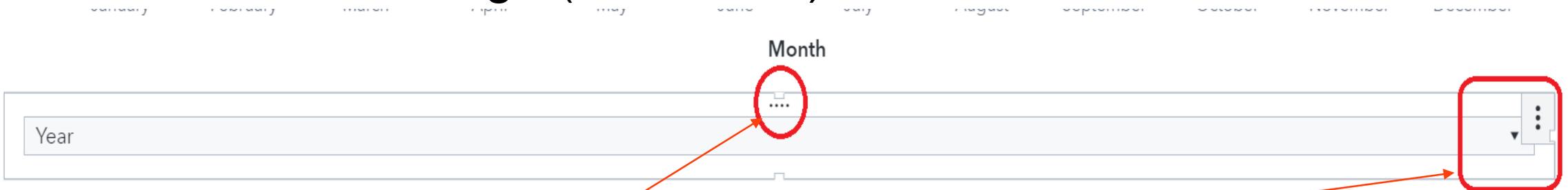
### 1. Add to Current Page (Continued)



# Left Pane - Objects

## Left Pane

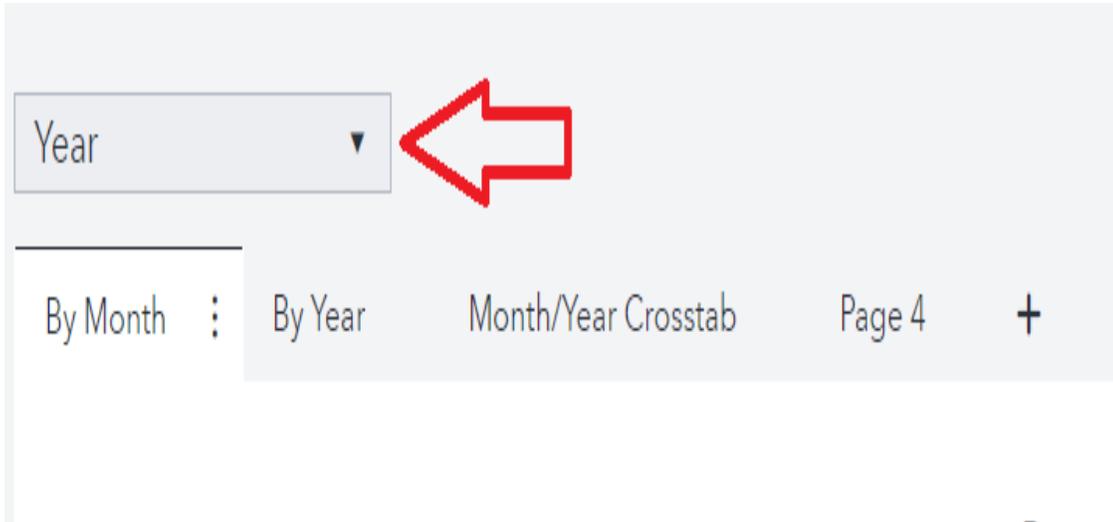
### 1. Add to Current Page (Continued)



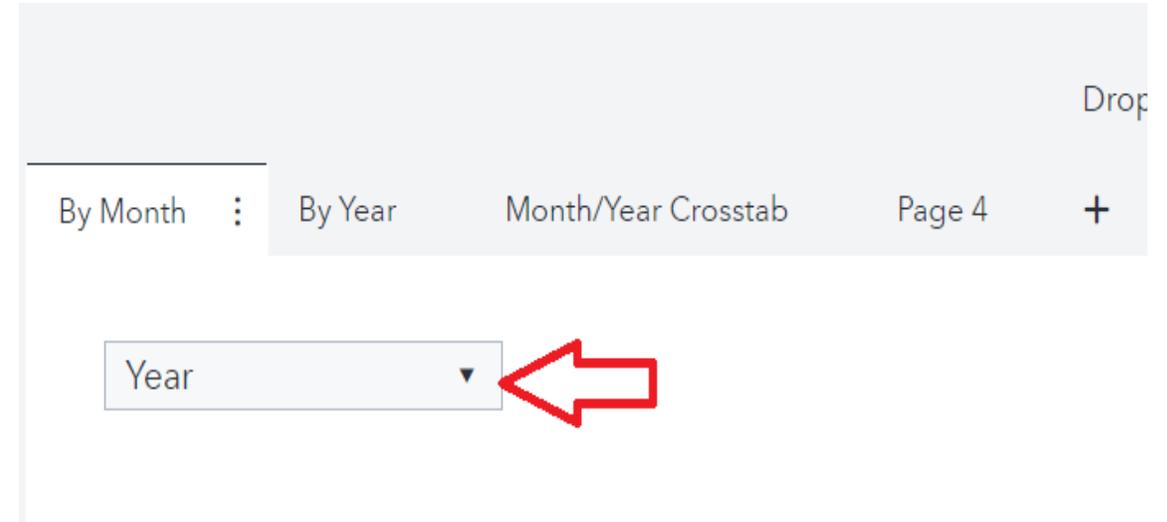
- Drag to anywhere in page
- Menu for Drop-down
  1. Move to other places
  2. Duplicate and create another drop-down
  3. Change drop-down to something else such as Slider/Text

# Difference in Report/Page Control

## As Report Control



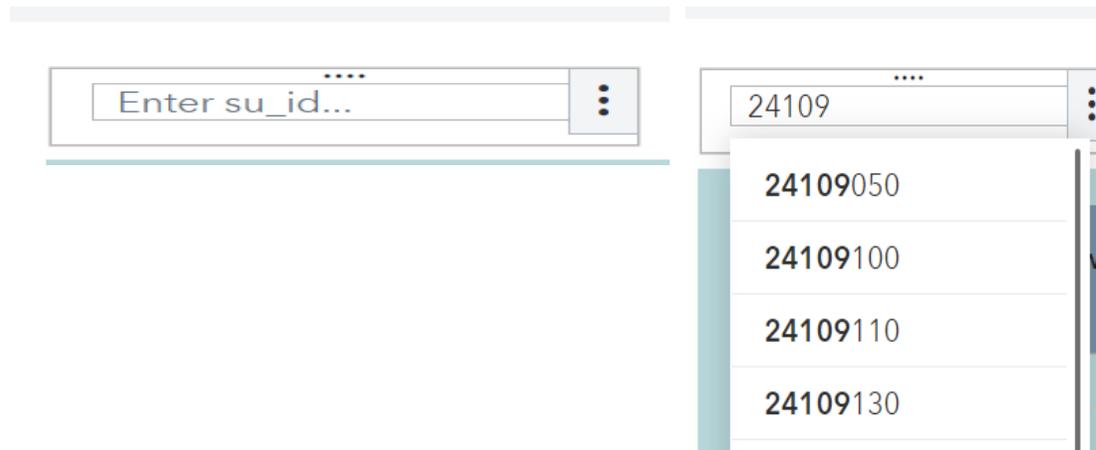
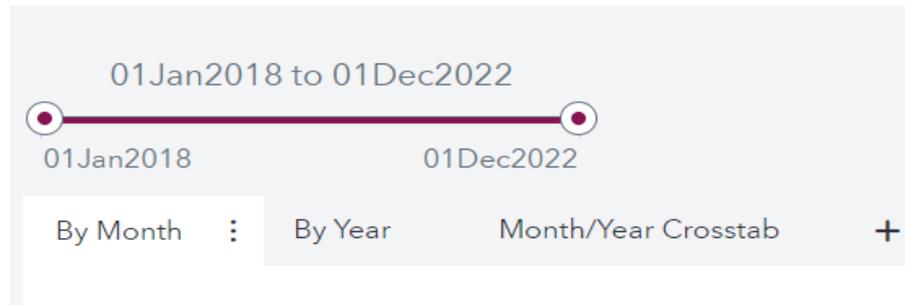
## As Page Control



# Left Pane - Objects

## Left Pane

1. Drop-down list
2. Example of Slider
3. Example of Text



# Right Pane - Options

## Right Pane

- Options
  - Shading

Field Manager ID	Interviewer ID	Number of Cases
015287	034749	3
070984	034715	3
070881	034716	15
008125	034720	23
070852	034702	10
070881	034850	10
070984	030246	56
070881	028790	17

### Options

List table - Field Manager ID 1

#### Cell Graphs

##### Number of Cases

Cell Graph:

Heat map

Gradient:



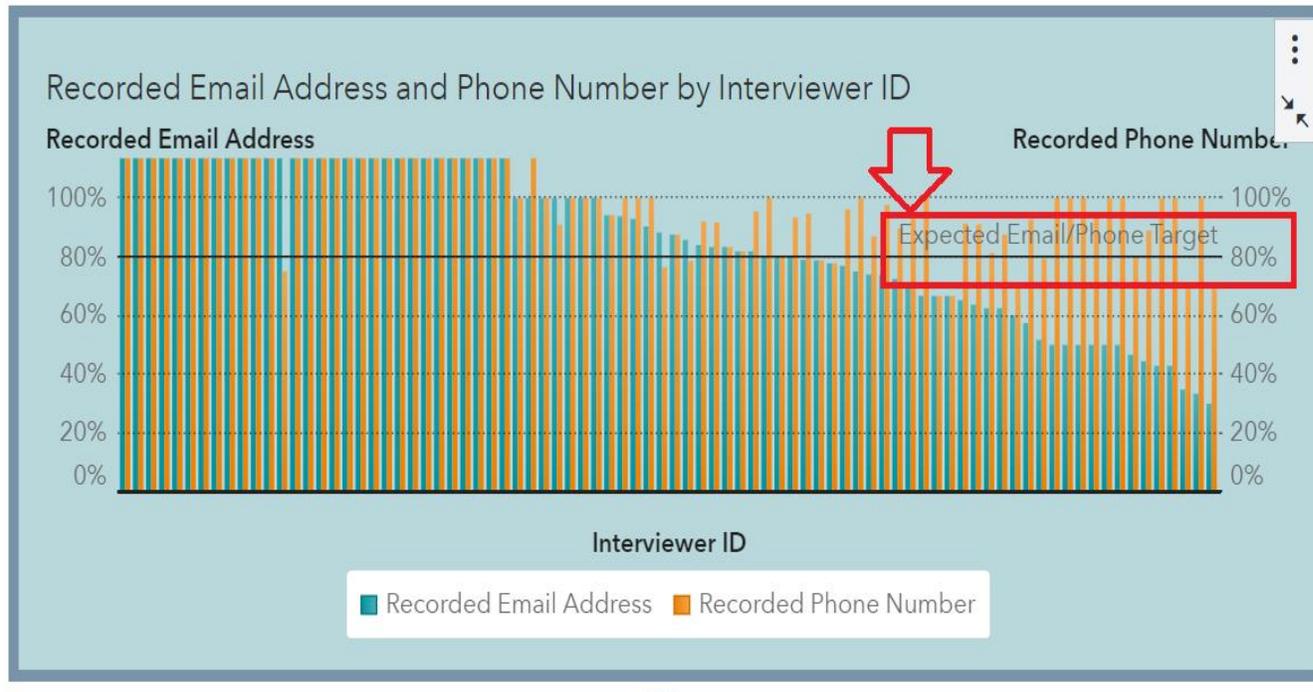
+ New cell graph



# Right Pane - Options

## Right Pane

1. Options
2. Reference Line



## Options

Dual axis bar - Interviewer ID 1

### Reference Lines

#### Expected Email/Phone Target

Label

Expected Email/Phone Target

Value

0.8

Axis

Y

+ New reference line



# Right Pane - Roles

## Right Pane

### 2. Roles

#### Data Roles

List table - Field Manager ID 1

#### Columns

- Field Manager ID
- Interviewer ID
- FI Name
- Number of Cases
- Duplicate Locations
- Recorded Email Address
- Recorded Phone Number
- Duration in Minutes
- Quex Launch Flag

+ Add

#### Hidden

+ Add

Options

Roles

Actions

Rules

Filters

Ranks



# Right Pane - Actions

## Right Pane

### 3. Actions

Field Manager ID  
Field Manager ID

Interviewer ID

Dashboard | FI Summary | Duplicate Locations | FI Detail | Map +

FI Name

FM Validation Summary

Field Manager ID	Interviewer ID	Number of Cases	Duplicate Locations	Recorded Email Address	Recorded Phone Number
070881	007963	1	.	100% <span style="color: green;">■</span>	0
070984	030246	1	.	100% <span style="color: green;">■</span>	0
070852	034682	3	.	33% <span style="color: red;">■</span>	33
008125	034897	2	.	100% <span style="color: green;">■</span>	50
070852	034719	2	.	50% <span style="color: red;">■</span>	50
070881	034668	2	.	100% <span style="color: green;">■</span>	50
015287	034749	3	.	67% <span style="color: orange;">■</span>	67
070984	034715	3	.	67% <span style="color: orange;">■</span>	67

Actions [View Diagram](#)

List table - Field Manager ID 1

Automatic actions on all objects

> Object Links

∨ Page Links

- Dashboard
- Duplicate Locations
- FI Detail
- Map

> Report Links

> URL Links

Options

Roles

Actions

Rules

Filters

Ranks



# Right Pane - Actions

## Right Pane

### 3. Actions (Continued)

Field Manager ID

Field Manager ID ▾ Interviewer ID ▾

Dashboard FI Summary Duplicate Locations **FI Detail** Map +

FI Name ▾

FM Validation Summary

Field Manager ID	Interviewer ID	Number of Cases	Duplicate Locations	Recorded Email Address	Recorded Phone Number
008125	034897	2	.	100% <span style="color: green;">■</span>	50
070852	034719	2	.	50% <span style="color: red;">■</span>	50
070881	034668	2	.	100% <span style="color: green;">■</span>	50
015287	034749	3	.	67% <span style="color: yellow;">■</span>	67
070984	034715	3	.	67% <span style="color: yellow;">■</span>	67
070881	034716	15	.	67% <span style="color: yellow;">■</span>	67
008125	034720	23	.	35% <span style="color: red;">■</span>	70
070852	034702	10	.	30% <span style="color: red;">■</span>	70

**Actions** [View Diagram](#)

List table - Field Manager ID 1 ▾

Automatic actions on all objects

> Object Links

▼ Page Links

Dashboard

Duplicate Locations

**FI Detail**

Map

> Report Links

> URL Links

Options Roles **Actions** Rules Filters Ranks



# Right Pane - Actions

## Right Pane

### 3. Actions (Continued)

PROD > FI Detail

Field Manager ID  
Field Manager ID

Interviewer ID

FI Name

Date Completed

Enter su\_id...

field\_disp

Field Manager ID	Interviewer ID	su_id	Date Completed	field_disp	tsso_validation_status
070881	034716	24159450	06/05/2024	71 Quex Comp in person	Supervisor Review
070881	034716	24160100	06/09/2024	73 Quex Comp by web	Not in Validation
070881	034716	24160490	06/08/2024	71 Quex Comp in person	AM, NML
070881	034716	24161190	07/02/2024	72 Quex Comp by phone	Complete by telephone
070881	034716	24259380	05/15/2024	71 Quex Comp in person	Not in Validation
070881	034716	24259820	04/27/2024	71 Quex Comp in person	Max Contact Attempts Reached
070881	034716	24259940	07/24/2024	73 Quex Comp by web	Not in Validation
070881	034716	24260420	06/28/2024	71 Quex Comp in person	Supervisor Review
070881	034716	24260820	04/14/2024	71 Quex Comp in person	Supervisor Review
070881	034716	24260990	04/23/2024	71 Quex Comp in person	Max Contact Attempts Reached



# Set Up Data Mapping

## Right Pane

### 3. Actions (Prerequisite Step in Left Pane)

The screenshot displays the SAS Data Studio interface. On the left, the 'Data' pane shows a list of data items under 'FISUMMARY', including 'FI Name - 93', 'Field Manager ID - 5', 'Interviewer ID - 84', and 'ProjectID - 93'. A context menu is open over the 'FISUMMARY' item, with the 'Map data...' option circled in red. The main workspace shows two charts: 'Recorded Email Address and Phone Number by Interviewer ID' and 'Duplicate Location Count by Interviewer ID'. The right-hand side of the interface features a vertical toolbar with icons for 'Options', 'Roles', 'Actions', 'Rules', 'Filters', and 'Ranks'.



# Set Up Data Mapping

## Right Pane

### 3. Actions (Prerequisite Step - Continued)

Map Data for FISUMMARY

1. FISUMMARY - FIDETAIL

Enable data mapping

Source: Interviewer ID  
Target: Interviewer ID

Field Manag... Field Manag...

2. FISUMMARY - GEONETWORK

Enable data mapping

Source: Field Manag...  
Target: Field Manag...

Interviewer ID Interviewer ID

3. FISUMMARY - DUP LOCATIONS

OK Cancel



# Right Pane - Rules

## Right Pane

### 4. Rules

Field Manager ID: Interviewer ID

Field Manager ID

Dashboard FI Summary FI Detail Map +

FI Name

Field Manager ID	Interviewer ID	Number of Cases	FIS Flag	Recorded Email Address	Recorded Phone Number
070881	034809	1	.	0%	0%
070881	007963	1	.	100%	0%
070984	030246	1	.	100%	0%
070852	034682	3	.	33%	33%
070881	034668	2	.	100%	50%
008125	034897	2	.	100%	50%
070852	034719	2	.	50%	50%
015287	034749	3	.	67%	67%

Display Rules

List table - Field Manager ID 1

+ New rule

Column - Recorded Email Address

Recorded Email Address

Right of text, with Recorded Email Address...

0 <= x < 0.6

0.6 <= x < 0.8

0.8 <= x <= 1

Column - Recorded Phone Number

Recorded Phone Number

Right of text, with Recorded Phone Num...

0 <= x < 0.6

0.6 <= x < 0.8

0.8 <= x <= 1



# Right Pane - Rules

## Right Pane

### 4. Rules

#### 1. Add New Rules

The image shows two side-by-side screenshots from a software application. The left screenshot displays a list of fields and measures. The right screenshot shows the 'Display Rules' configuration window.

**Left Screenshot (Field List):**

- Any Category
- Any Measure
- FI Name - 93
- Field Manager ID - 5
- Interviewer ID - 84
- Duplicate Locations
- Duration in Minutes** (circled in red)
- Number of Cases
- Quex Launch Flag
- Recorded Email Address
- Recorded Phone Number
- \_TYPE\_
- comp\_flag\_Mean

**Right Screenshot (Display Rules):**

- Display Rules
- List table - Field Manager ID 1
- + New rule** (circled in red)
- Column - Recorded Email Address
- Recorded Email Address
- Right of text, with Recorded Email Addre...
- 0  $\leq x < 0.6$
- 0.6  $\leq x < 0.8$
- 0.8  $\leq x \leq 1$



# Right Pane - Rules

## Right Pane

### 4. Rules

#### 2. Edit Rules

**Edit Display Rule** ✕

Recorded Email Address

Add an interval  + Recalculate ⋮

1	<input type="text" value="0"/>	<=	x	<	<input type="text" value="0.6"/>	<input type="checkbox" value="red"/>	<input type="checkbox" value="trash"/>
2	<input type="text" value="0.6"/>	<=	x	<	<input type="text" value="0.8"/>	<input type="checkbox" value="yellow"/>	<input type="checkbox" value="trash"/>
3	<input type="text" value="0.8"/>	<=	x	<=	<input type="text" value="1"/>	<input type="checkbox" value="green"/>	<input type="checkbox" value="trash"/>

Gauge type:

Specify column and placement of gauge:



# Thank You (or) Contact Information

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