SAS Visual Analytics 101 From ETL to Dashboard Creation

SAS® Institute Canada Inc.

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Charu Shankar

With a background in computer systems management. SAS Instructor Charu Shankar engages with logic, visuals, and analogies to spark critical thinking since 2007.

Charu curates and delivers unique content on SAS, SQL, Viya, etc. to support users in the adoption of SAS software.

When not coding, Charu teaches yoga and loves to explore Canadian trails with her husky Miko.





Agenda



Introduction



Use principles of good design in reporting



Explore main report objects in SAS Visual Analytics



Streamline ETL



Create a dashboard with SAS Visual Analytics

Handy Links

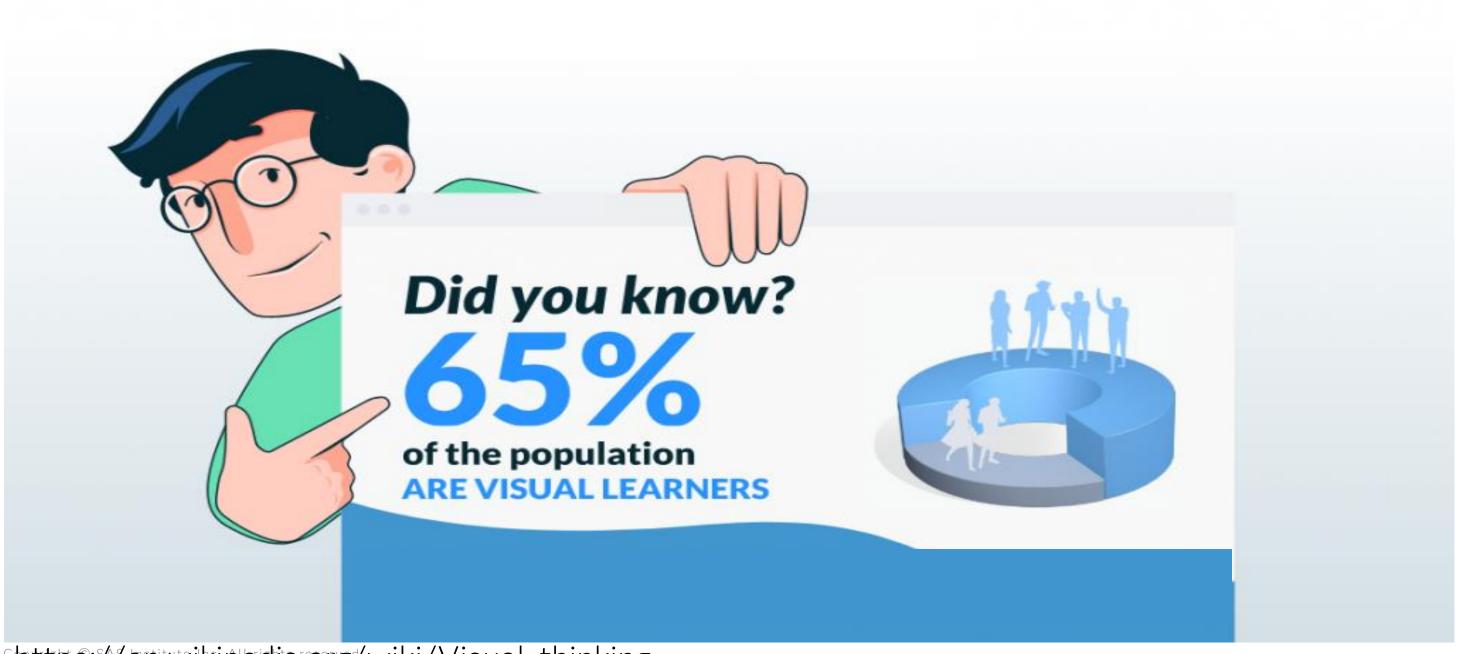


Intro	5	Query audience Set stage for talk	
Etl short talk & demo code	15		
Good Reporting short talk	35		
VA Demo			
Q&A	5		



What % of population is visual?

65% of the population are visual learners





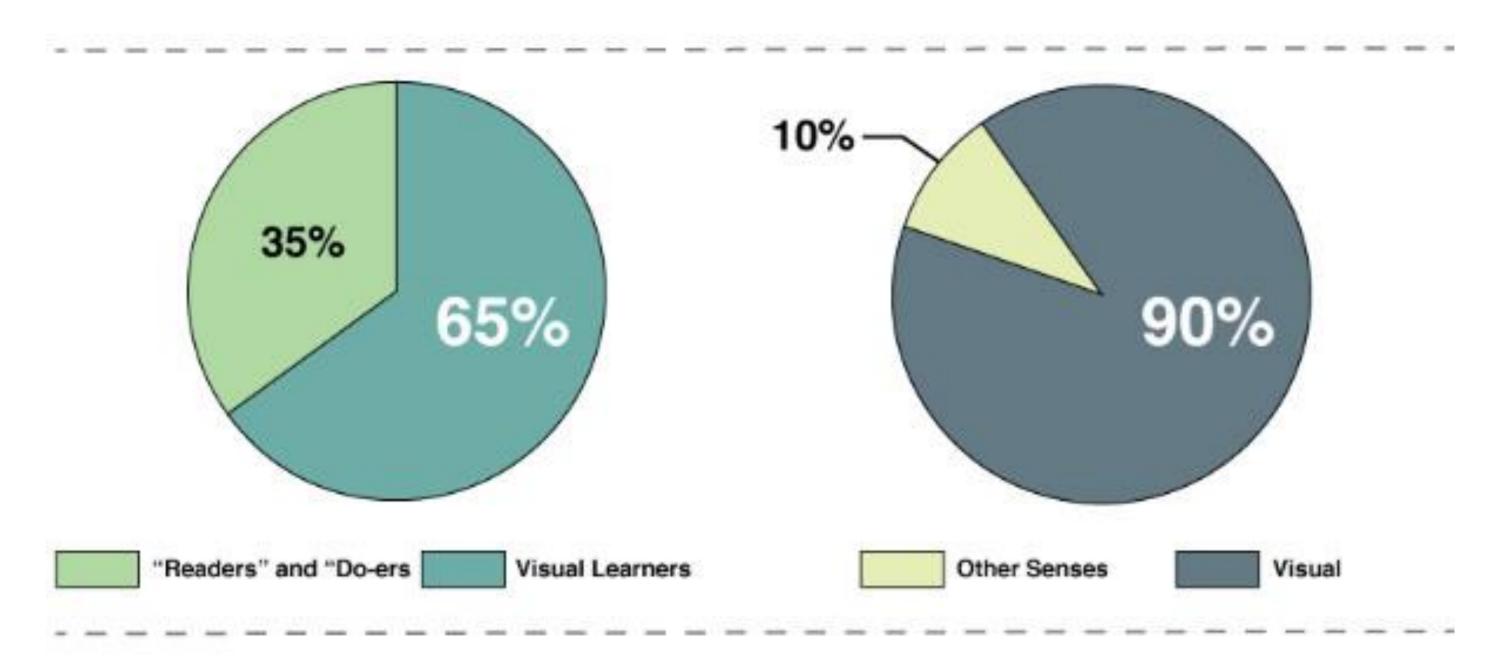
What % of information transmitted to the brain is visual?

Percentage of People Who Are

Visual Learners

% of Information the Brain Processes That Is

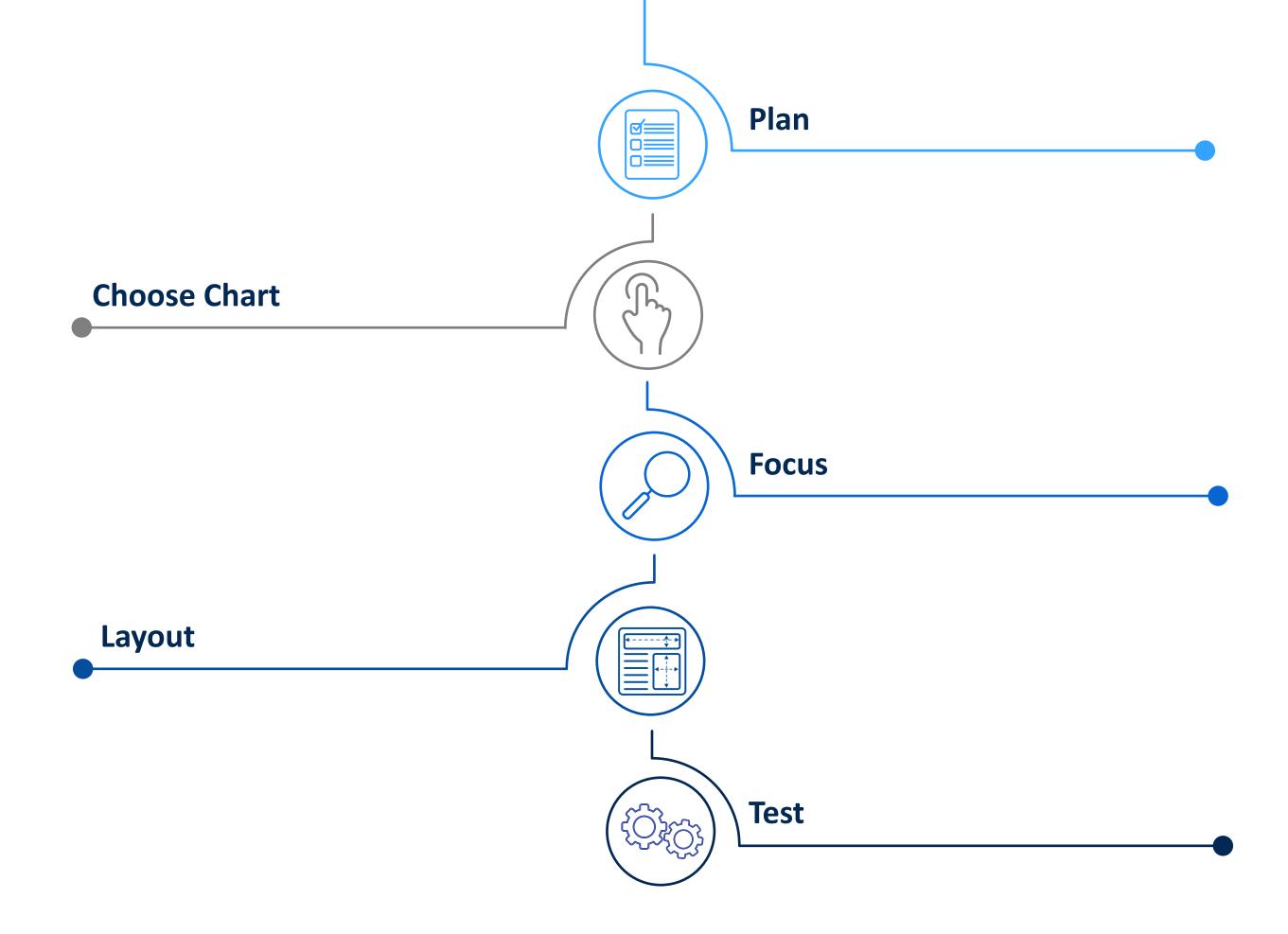
Visual Data



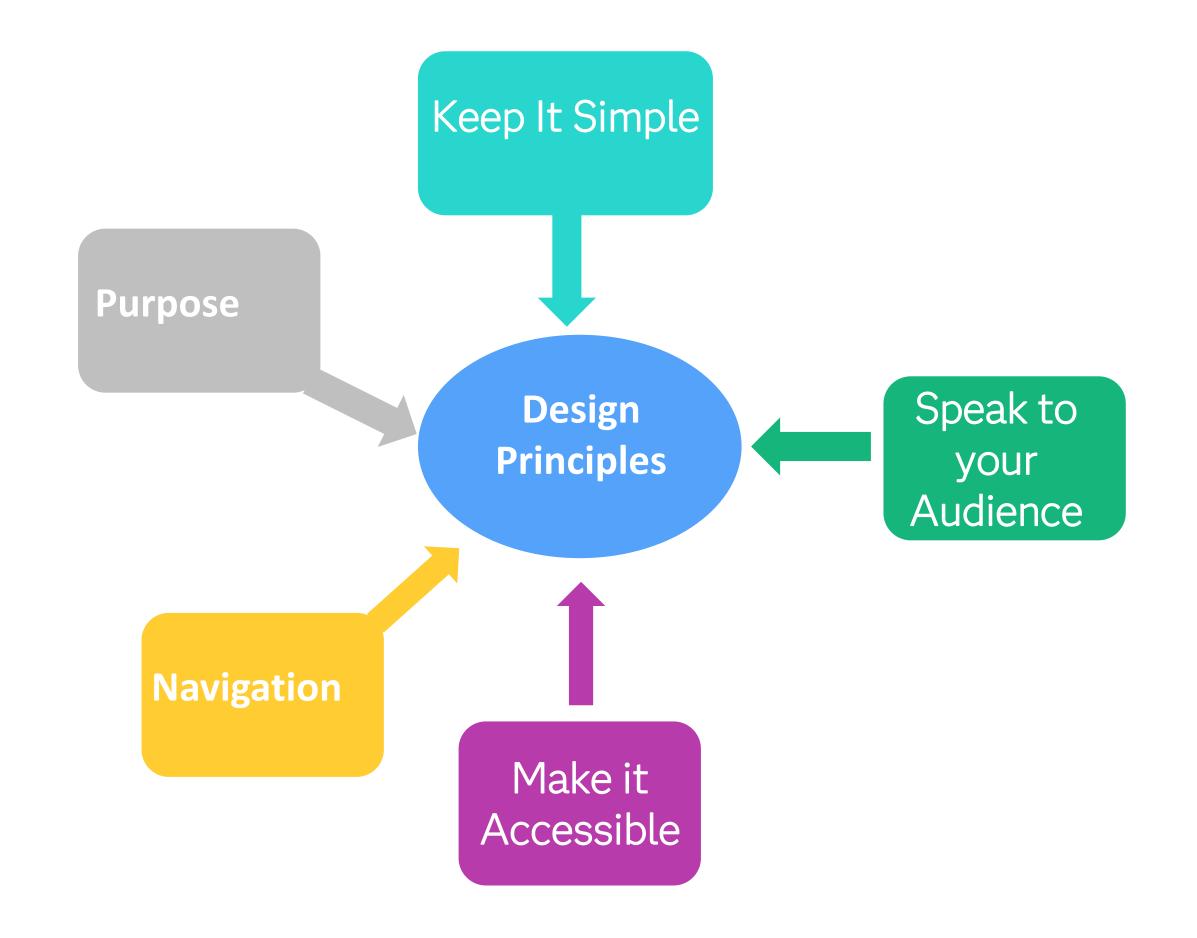


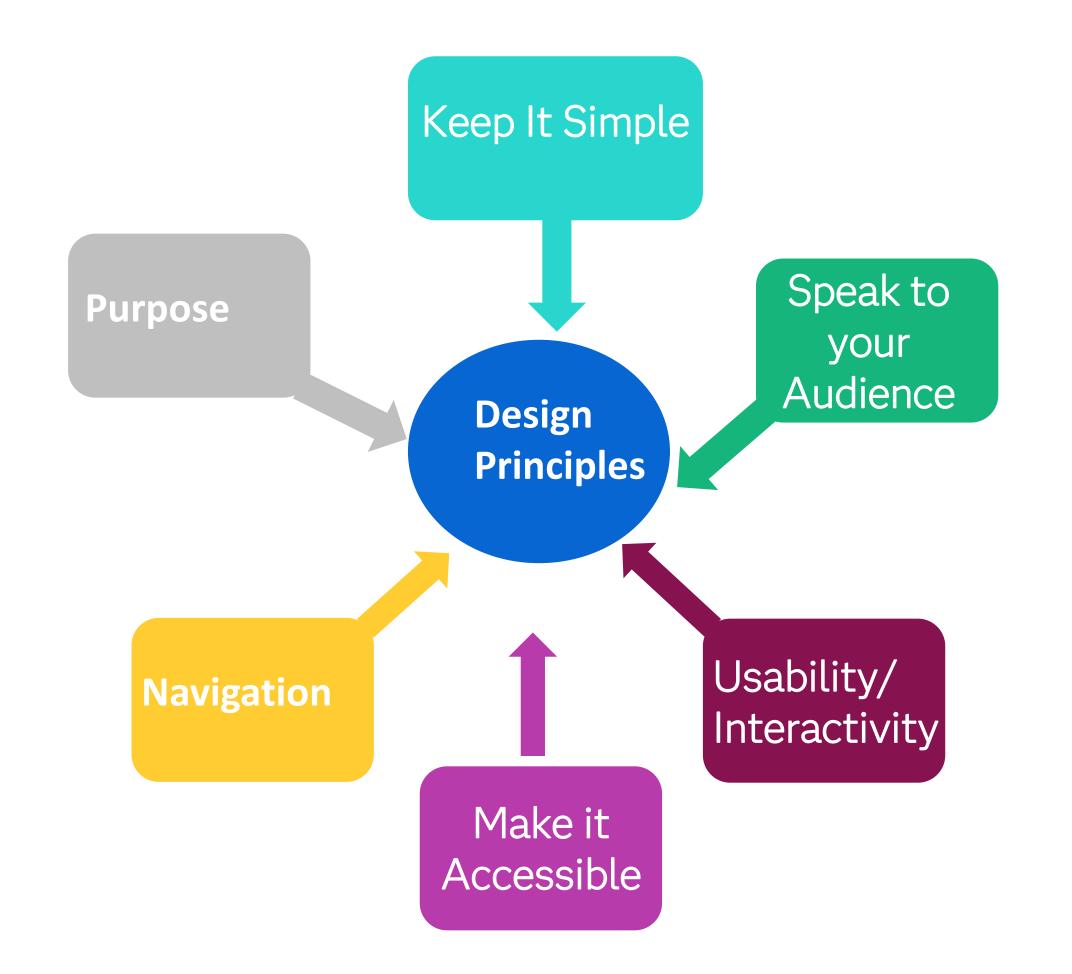
Principle	Definition	Action
Rule of Thirds	designs are more interesting and visually appealing when you place the object(s) of your design in one of the thirds sections.	Imagery on one third of each page
Gestalt design	Users see the entirety before the detail	Home Page
Visual Hierarchy	the human mind processes bigger elements as more important.	All Pages
Grid based layout	Users can easily scan predictable grid-based interfaces. A good grid is easy to adapt to various screen sizes and orientations. grid layouts are an essential component of responsive web design.	A.I. collapsible button
Consistency	Pages have a similar look & feel to cut out white noise	All pages
Imagery	Humans are very visual so can digest a lot of information from one image.	Infographic
Movement	Visually objects at diff speeds	Videos on home page/training/hot topics page Carousel on home page





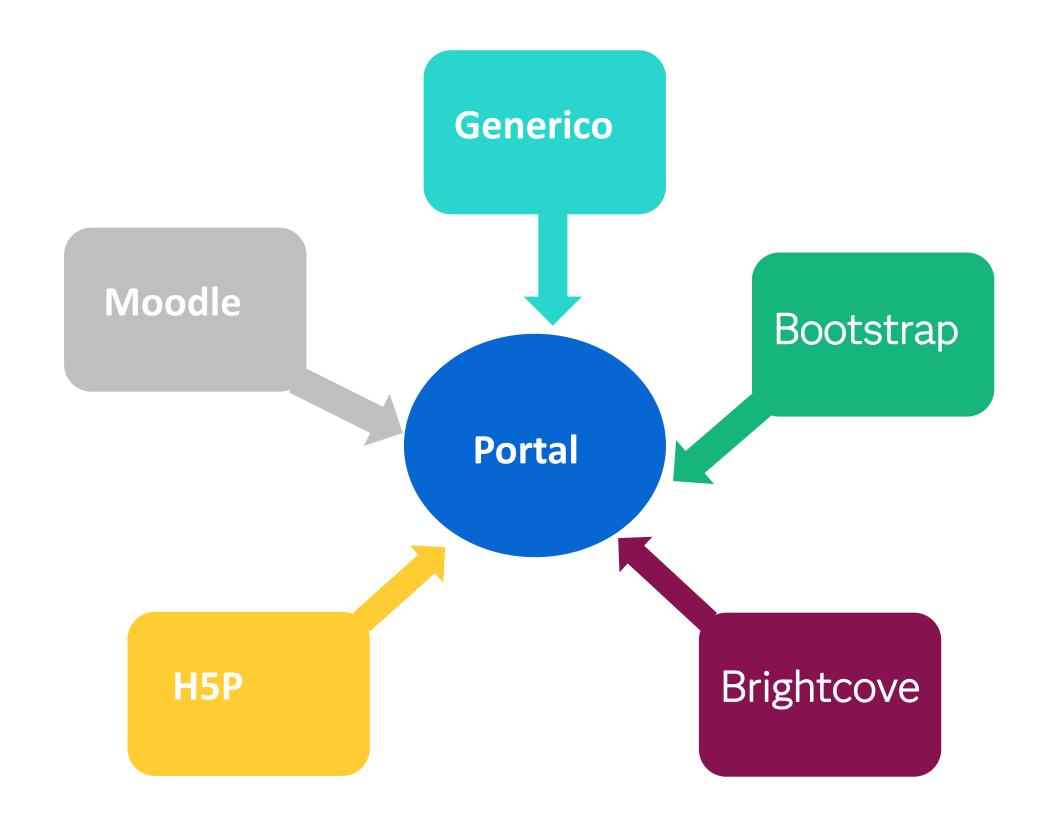






Principles of Good Design

				9-1			
Principle	e	Definition			Action	Action	
Rule of	Thirds	designs are more interesting and visually appealing when you place			Imagery	on one third of each	
Gesta Visua Grid b Consi Image	SA	OOO+ TISFIED ARNERS	3,000+ COMPANIES SERVED	126 COUNTRIES REPRESENTE	CE	2,750+ RTIFICATIONS AWARDED	
Movement Visually objects at diff speeds Videos on home page/training/hot topics page Carousel on home page							
Advanced Algorithms			ation Programming iterfaces (API)	Graphica	l Processing Units		



1 Plan

Select your data
Know your audience
Craft your message or story
Draft your report

Traditional Reporting vs. Dashboard Reporting

Feature	Dashboards	Reports
Data Type	Real-Time or Near-Real-Time	Historical
Interactivity	Interactive (filtering, drilling down)	Static
Visual Focus	Highly visual (charts, graphs)	Detailed information (tables, narratives)
Purpose	Summarized view for quick decision-making	In-depth analysis and insights
Usage	Continuous monitoring of key metrics	Periodic generation for performance review
Data Update Frequency	Continuous updates	Periodic updates (e.g., weekly, monthly)
User Accessibility	User-friendly, accessible to non-technical users	May require technical expertise to create/interpret
Typical Content	Key Performance Indicators (KPIs)	Comprehensive narratives, tables, annotations
Primary Use Case Syright © SAS Institute Inc. All rights reserved.	Operational contexts requiring ongoing tracking	Compliance, audits, detailed performance analysis



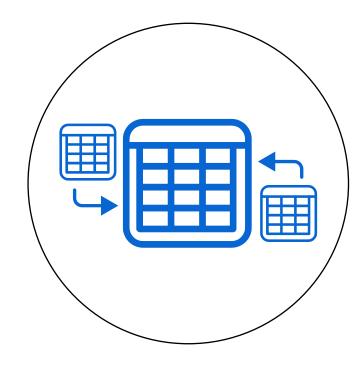


Select your data



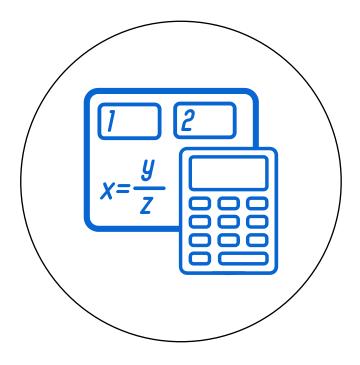
Any format

- SAS data sets
- Microsoft Excel files
- Database tables
- Text files



Multiple tables

- Combine tables
- Multiple data sources



Create data items

- One-click calculations
- Hierarchies
- Geography data items
- Parameters
- Statistical data items



Prepare your data before using it in SAS Visual Analytics





Know your audience



What to present?

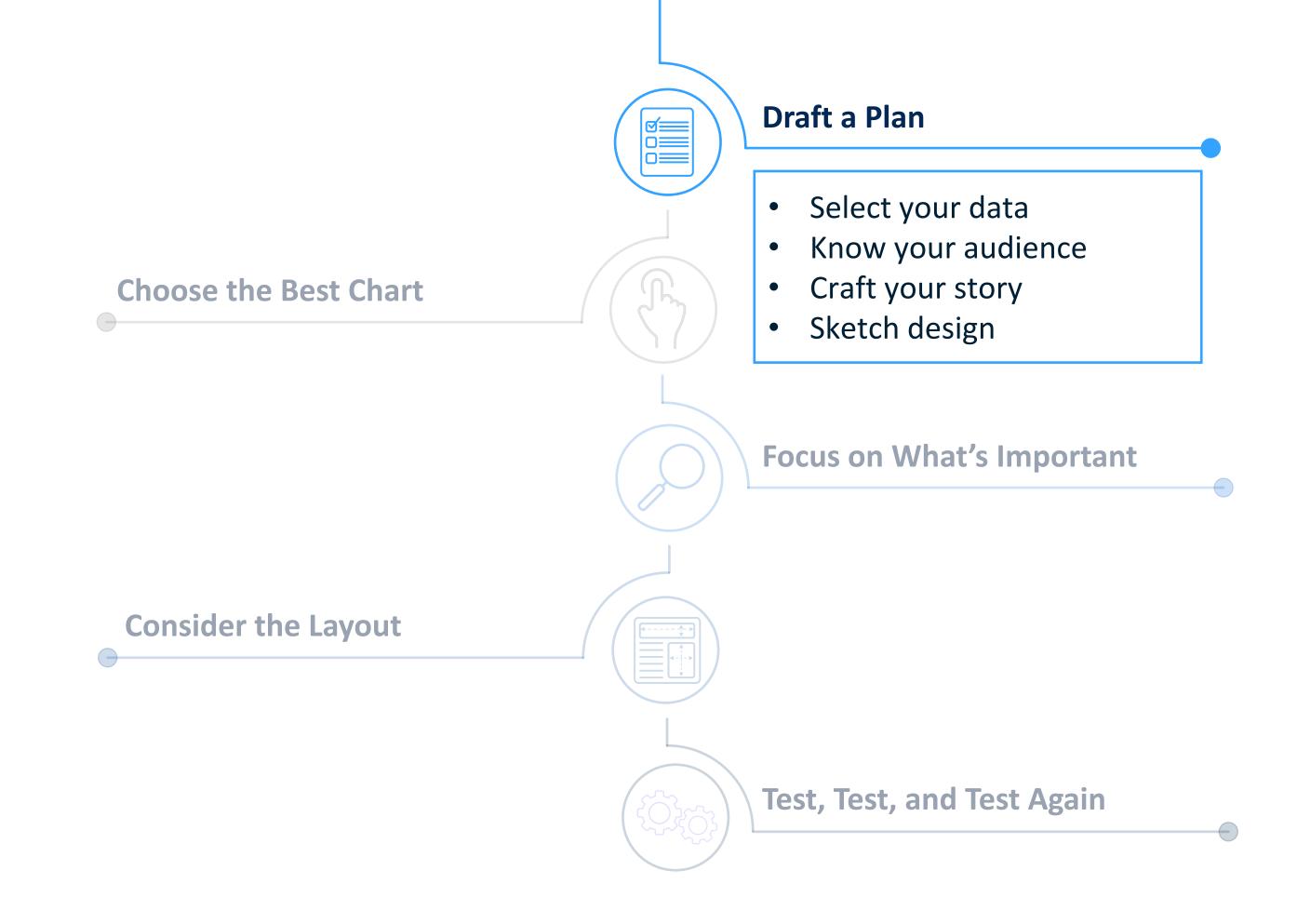


What level of detail?

How to present?





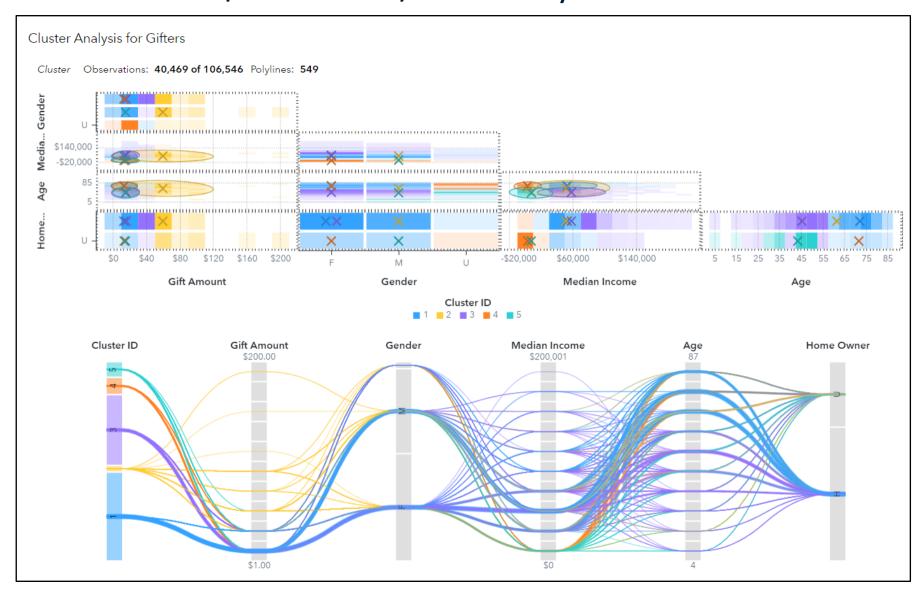






Know your audience

Data Scientist/Statistician/Data Analyst



Business User/Audience



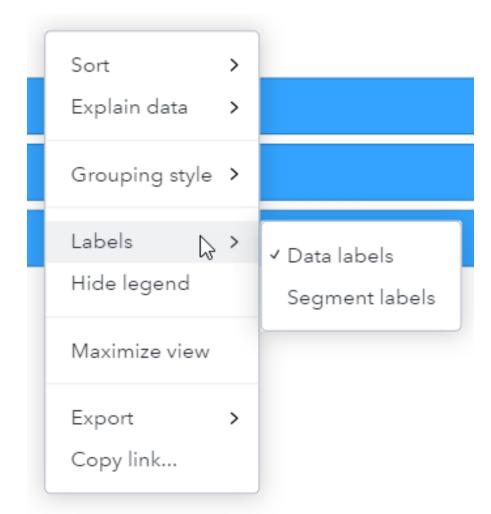






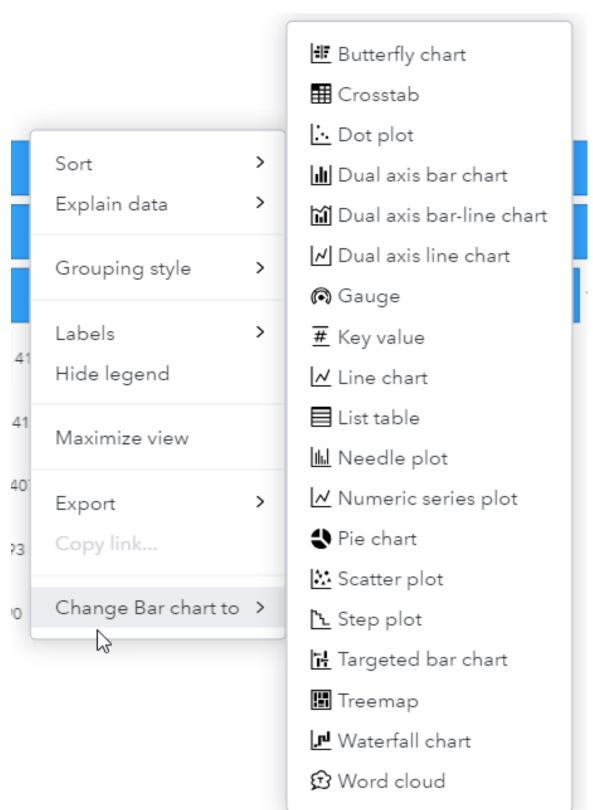
Know your audience

Simple edits

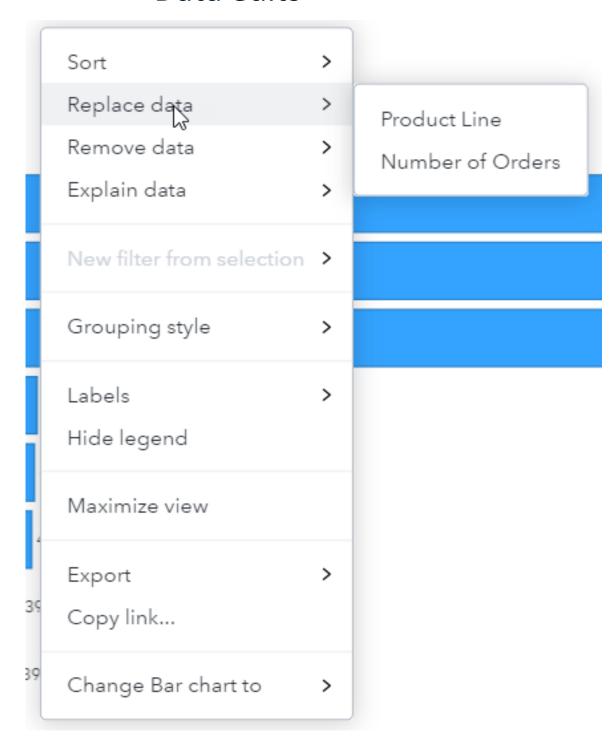


Viewer Customization Level

Comprehensive edits



Data edits







Craft your story

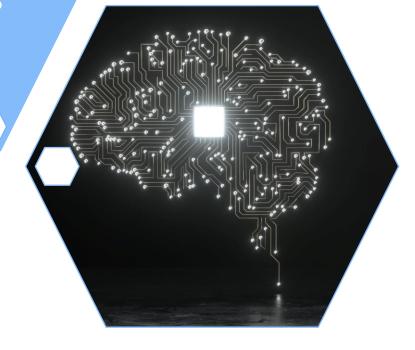
 $\frac{1}{2} \frac{1}{2} \frac{1}$

Are you trying to persuade?



Do you want the audience to take action?

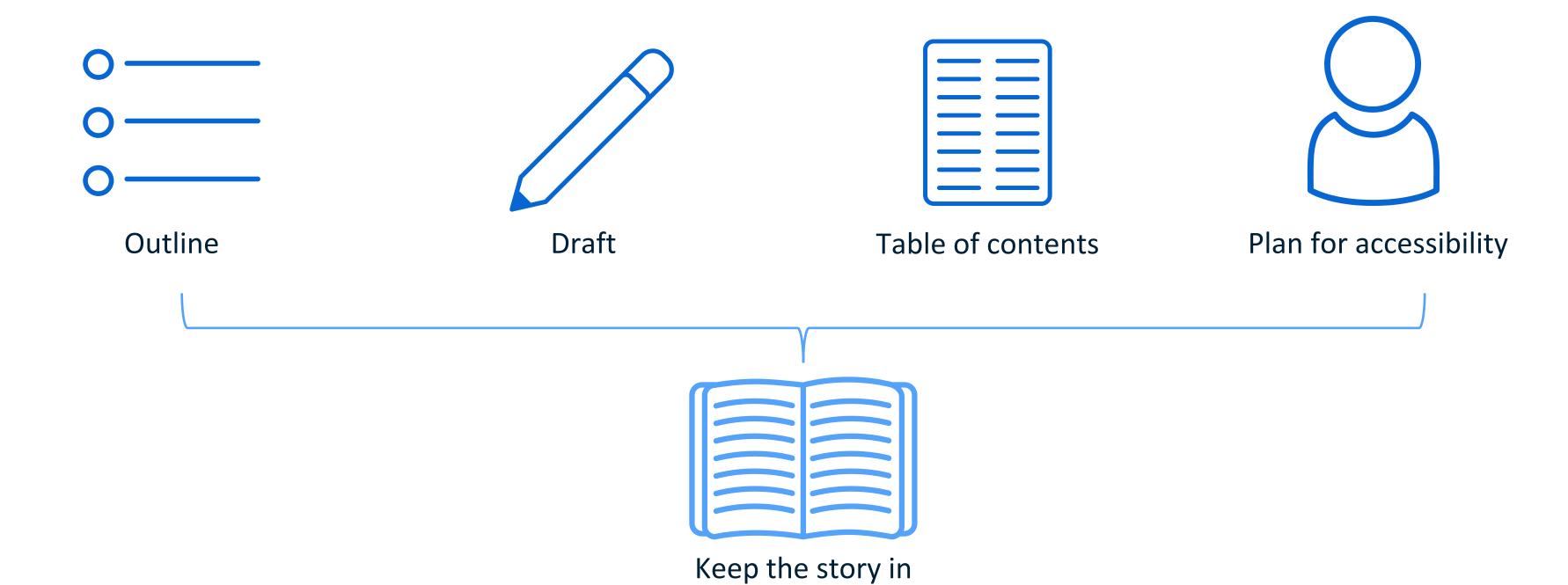
Are you presenting facts?





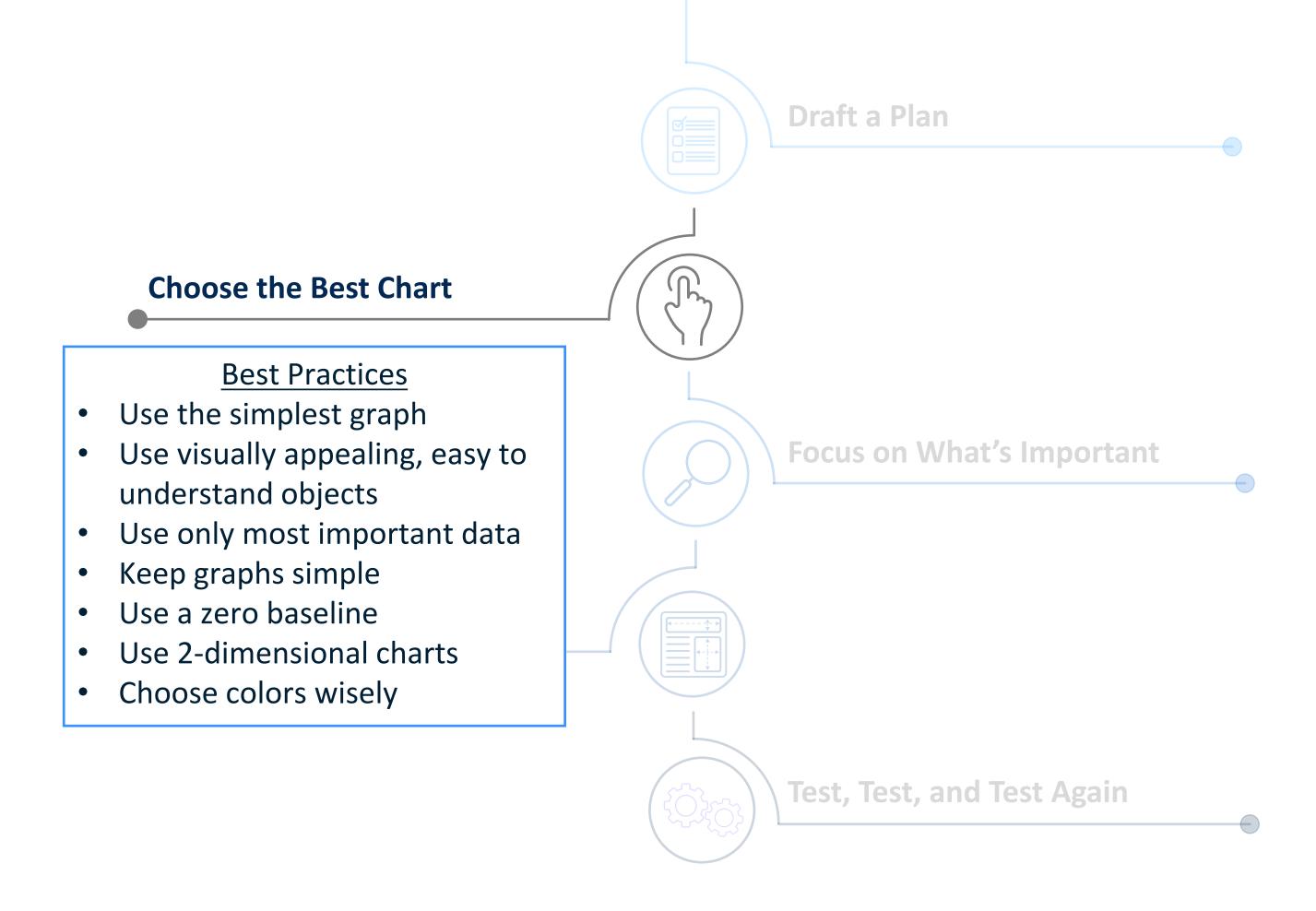


Sketch design



mind







Choose the Best Chart (Best Practices)



Who is the audience?

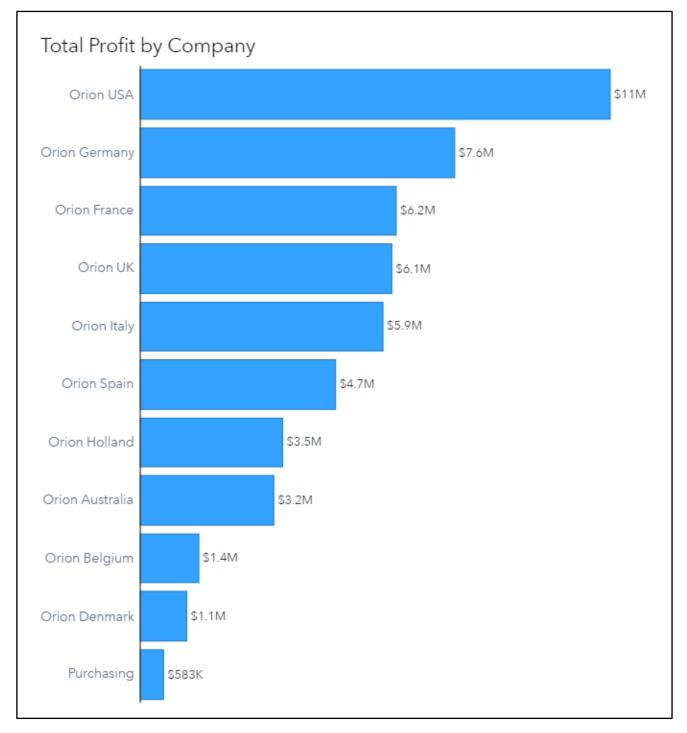
What data do you want to display?

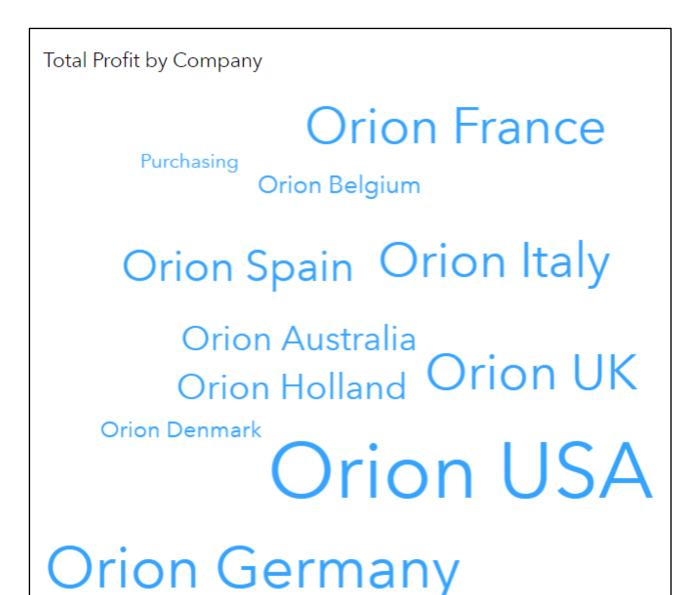




Choose the Best Chart (Best Practices)

Use the simplest graph







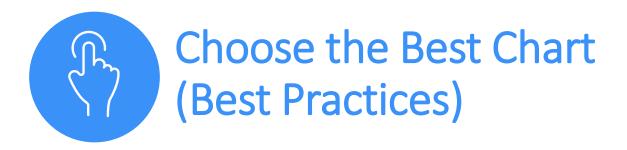


- Muddled message
- Less accessible



Create object templates to speed up development



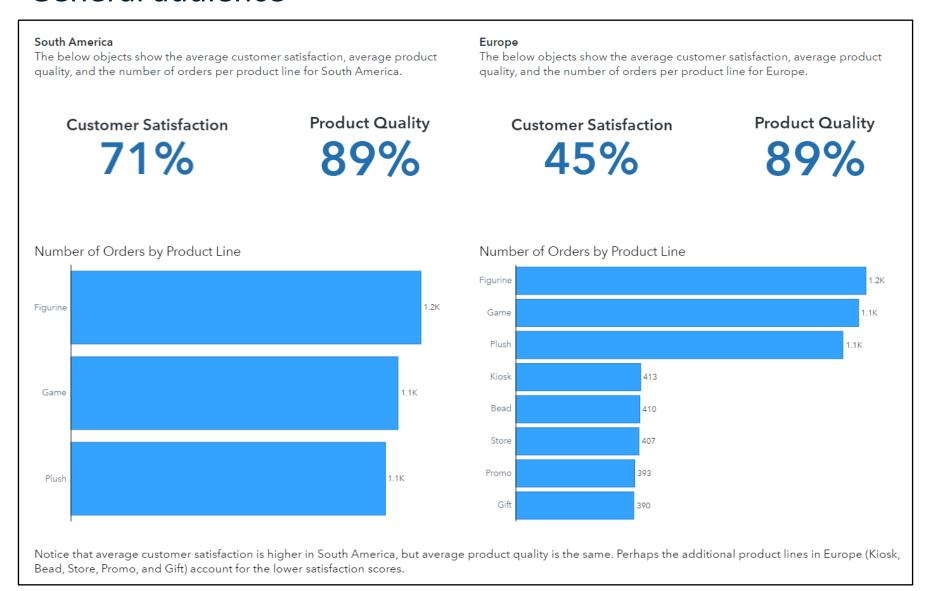


Use visually appealing, easy to understand objects

Statisticians

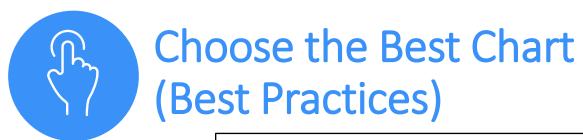


General audience



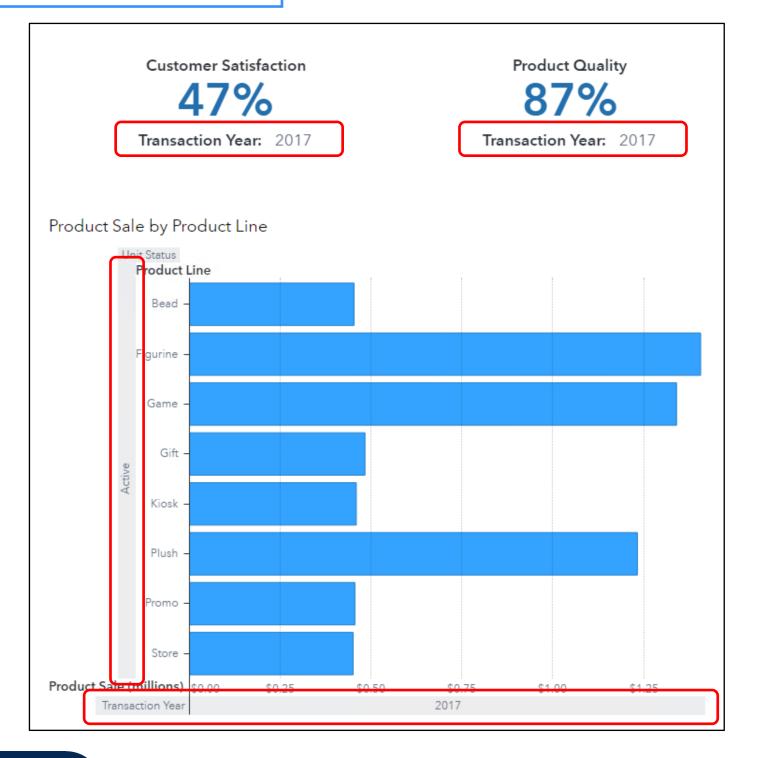






Use only the most important data







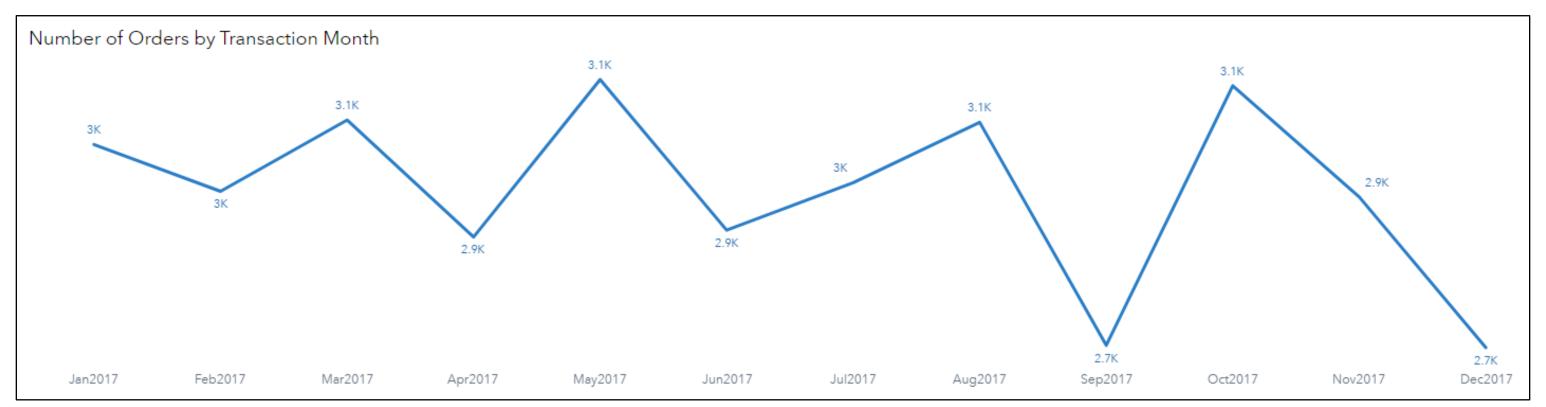
Notify users if lattice columns or lattice rows are used





Choose the Best Chart (Best Practices)

Keep graphs simple



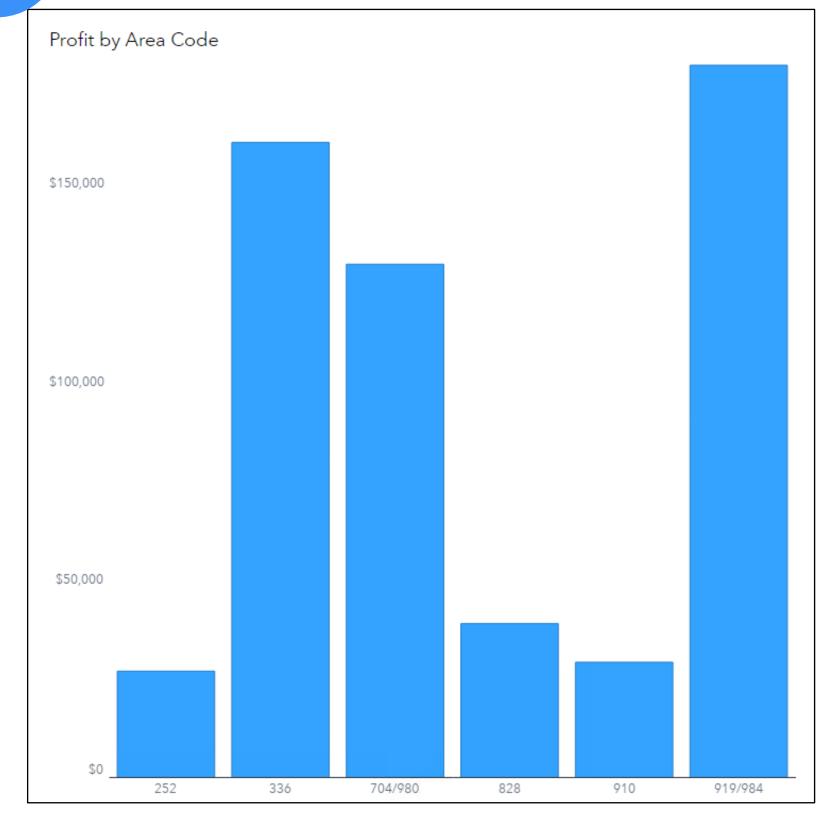


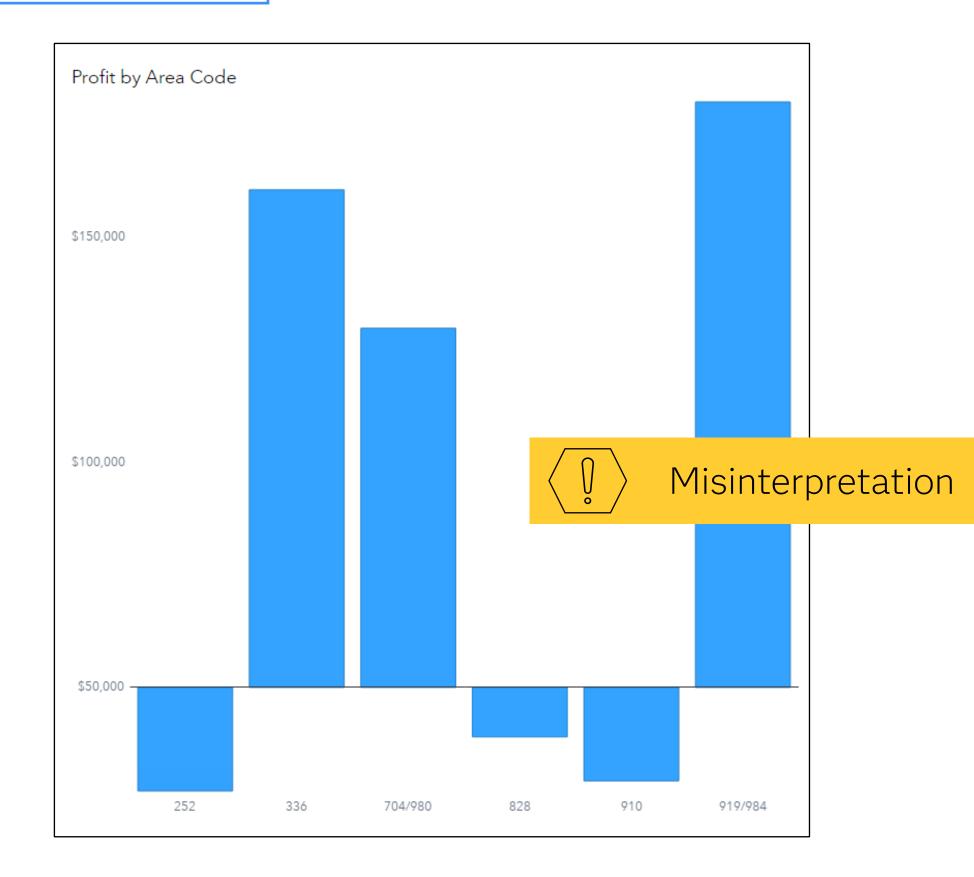


(F)

Choose the Best Chart (Best Practices)

Use a zero baseline

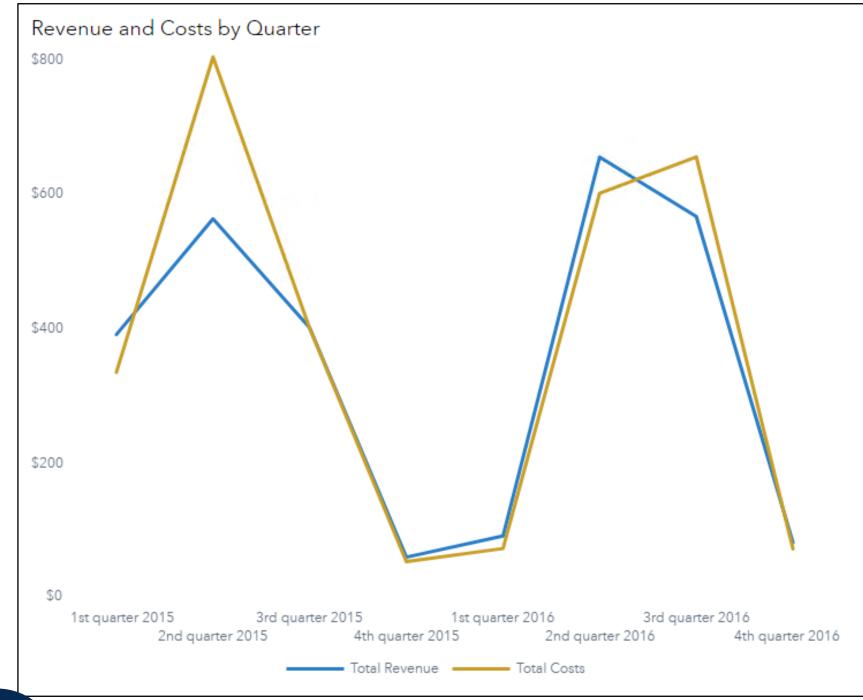


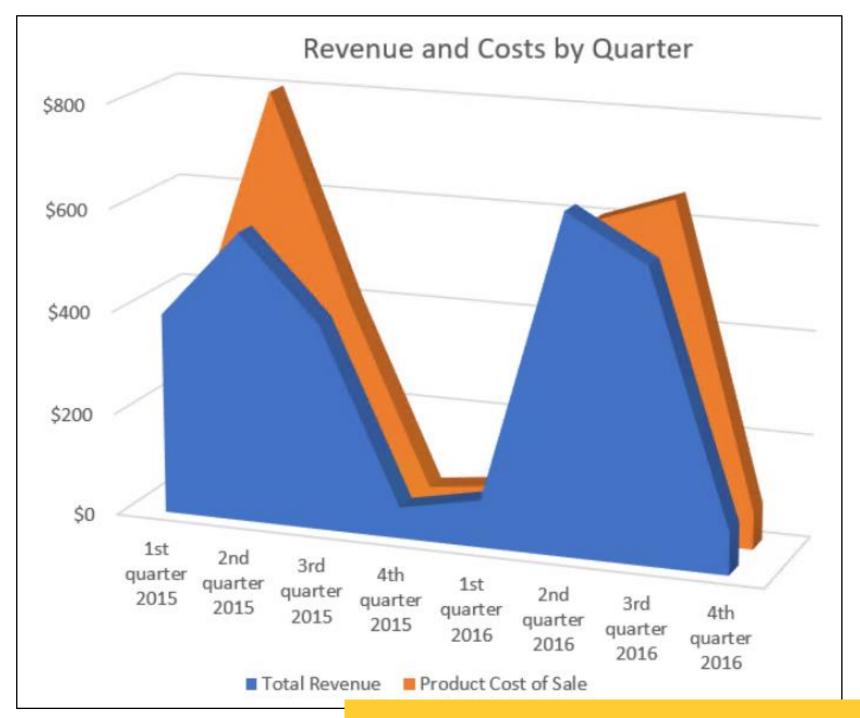




Choose the Best Chart (Best Practices)

Use two-dimensional charts





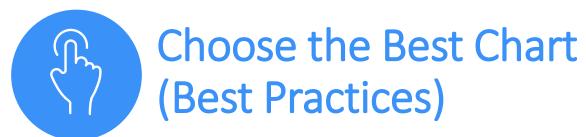


For multi-line charts, rotate attributes for data element styles

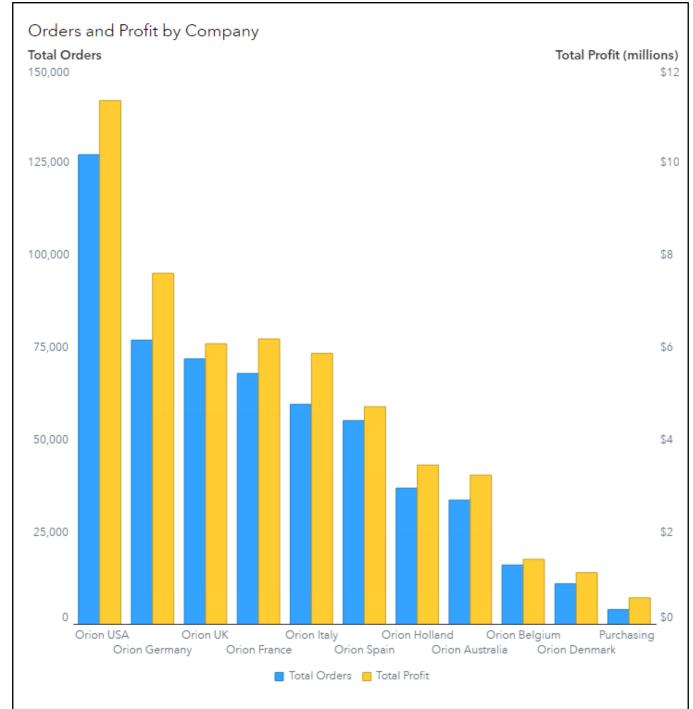


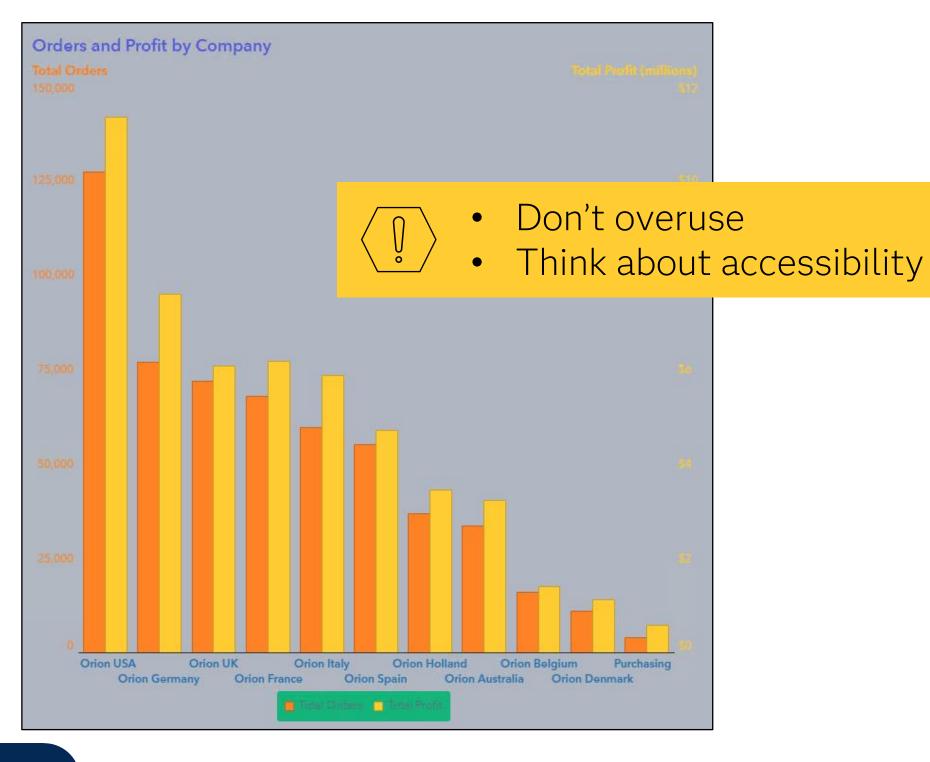
- Miss vital information
- Distorts data





Choose colors wisely





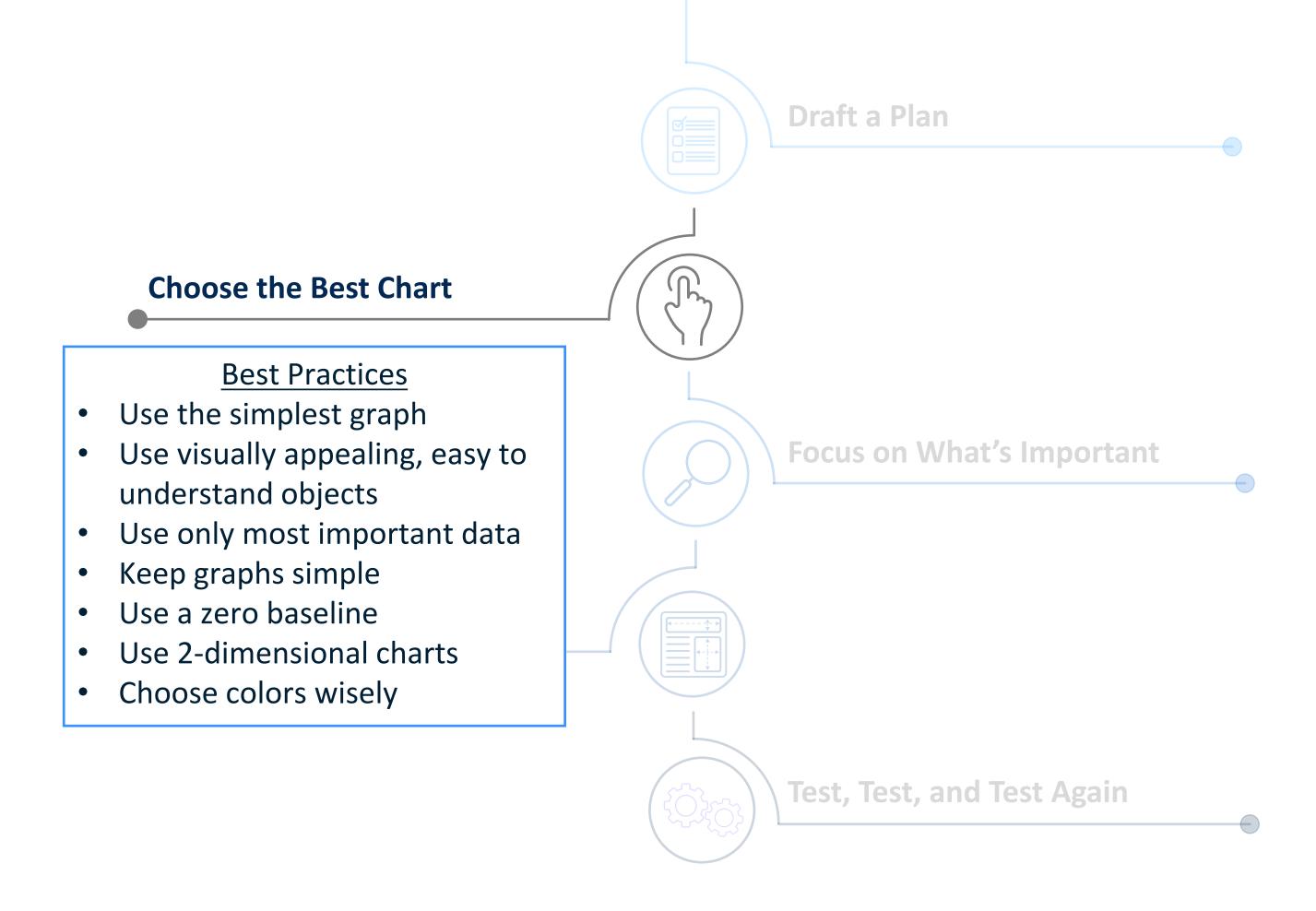


Create custom themes to customize the color palette

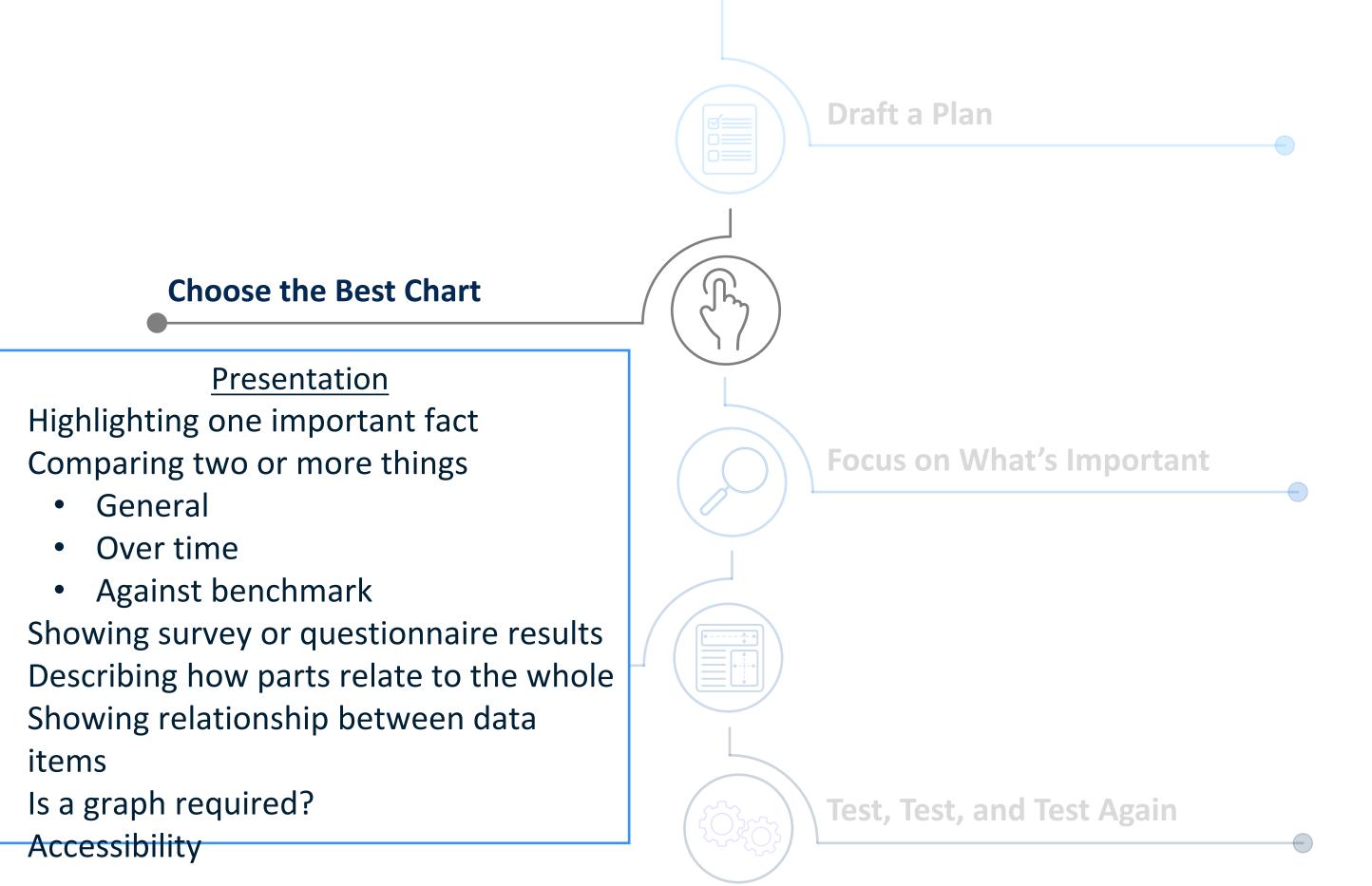


Above all else, show the data.

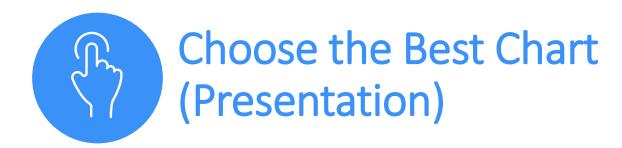
Edward Tufte
- Godfather of data visualization











Which chart do I choose?



Showing survey or questionnaire results?



Comparing two or more things?



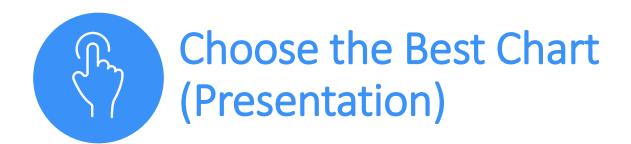


Showing relationships between data items?



required?





Highlight one important fact

Key value object

Customer Satisfaction

47%

Donut chart

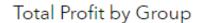
Quantity Ordered by Order Type

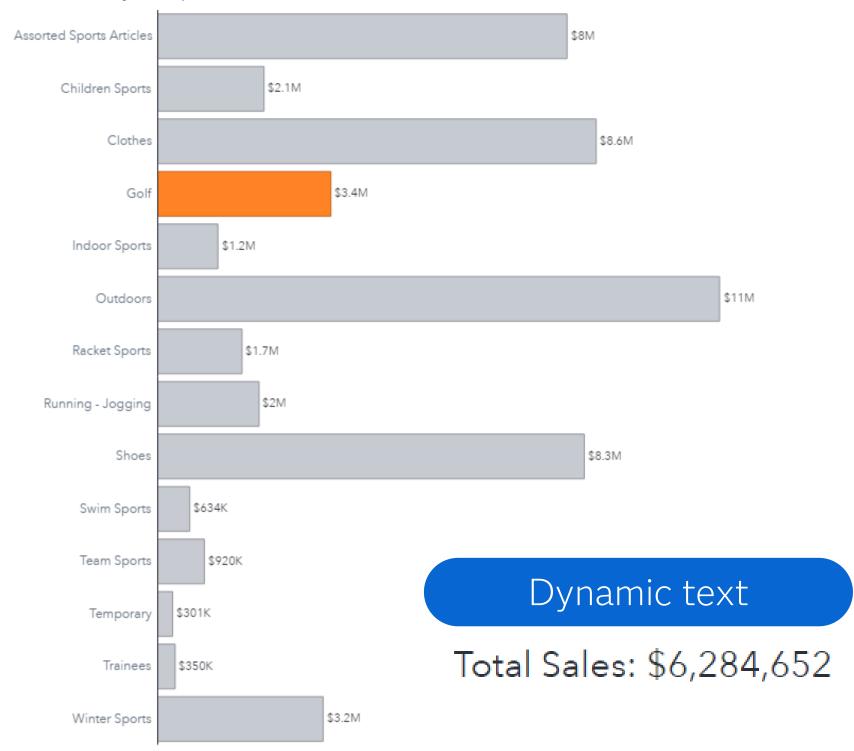




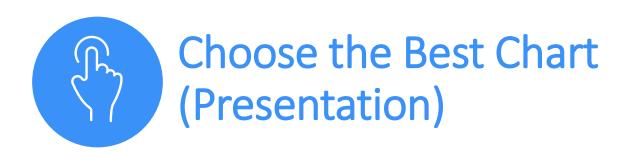
Use display rules to highlight important values

Faded bar chart









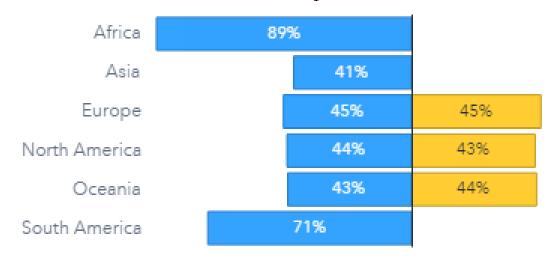
Compare two or more things

(General)

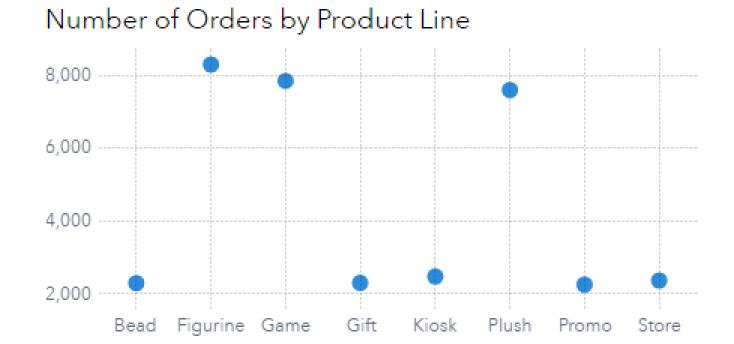
Dot plot

Butterfly chart

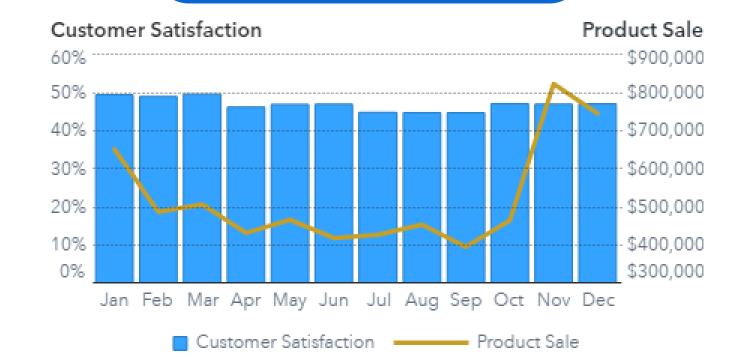
Customer Satisfaction by Continent

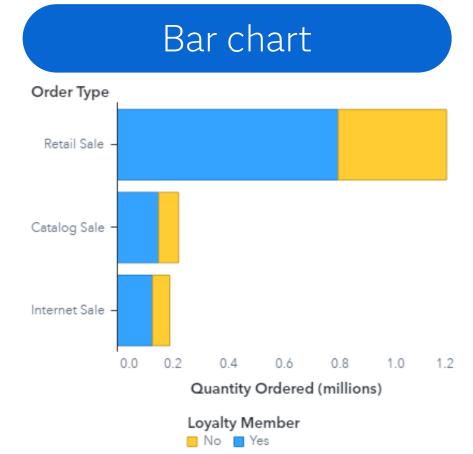


Novelty



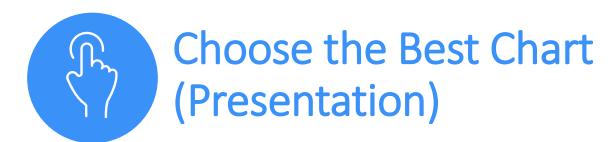
Dual axis chart









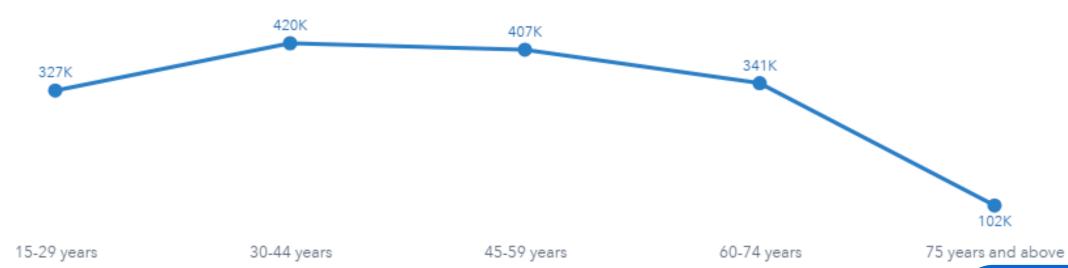


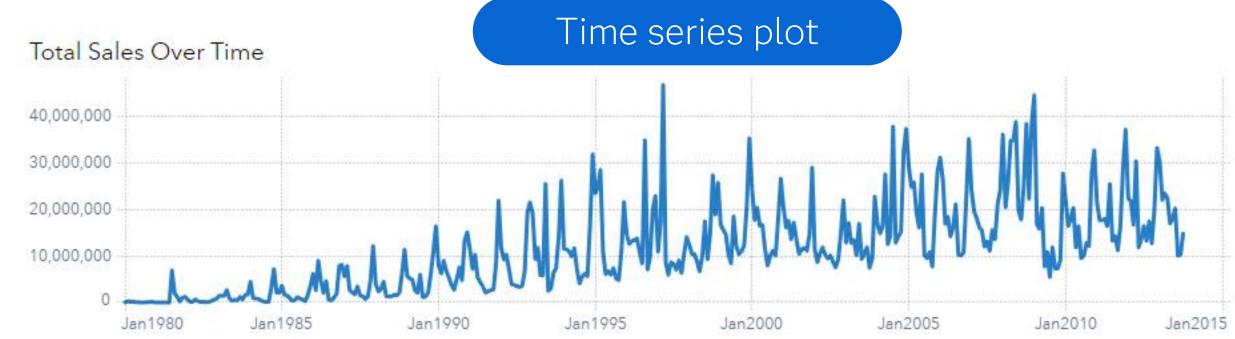
Compare two or more things

(Over time)



Quantity Ordered by Customer Age Group

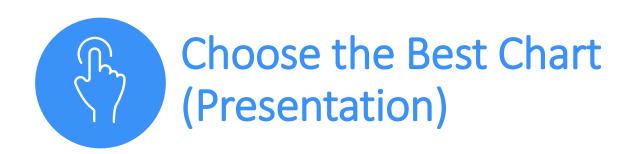






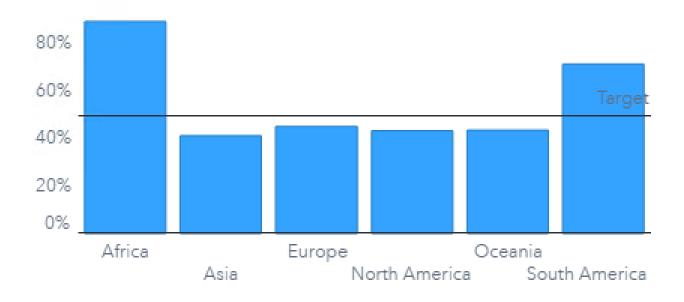
Avoid using an overview axis, use animation with caution





Reference lines

Customer Satisfaction by Facility Continent



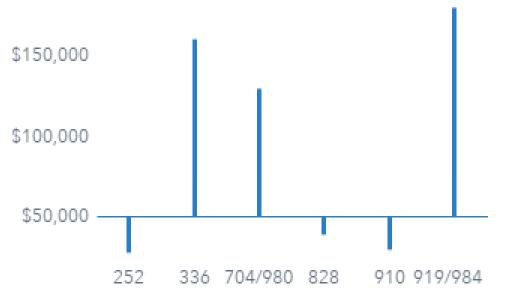
Avoid three-color gradients

Compare two or more things

Benchmark)

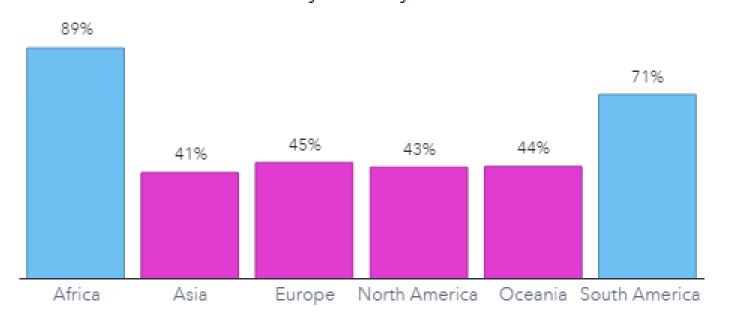
Needle plot

Profit by Area Code



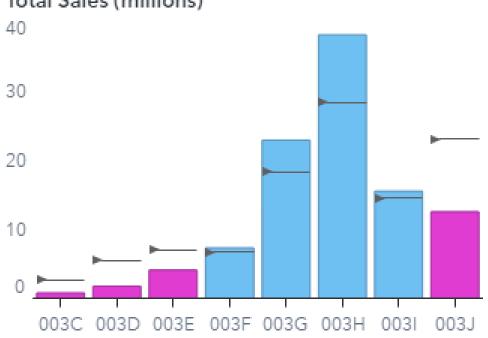
Display rules

Customer Satisfaction by Facility Continent



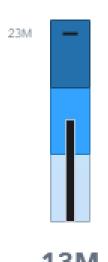
Targeted bar chart

Total Sales (millions)



Bullet gauge

Sales Goal



13M

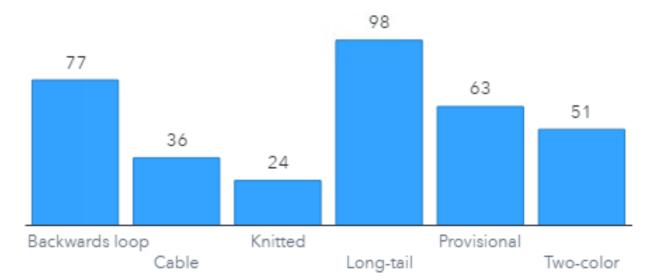




Show survey or questionnaire results

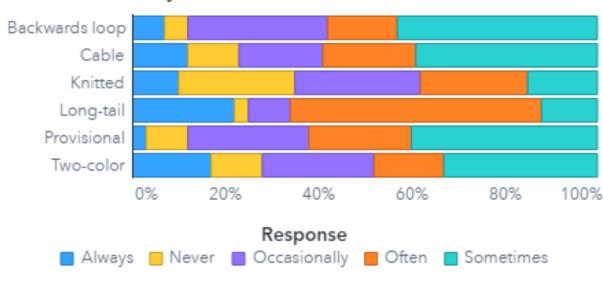
Vertical bar chart

Which cast on methods do you use regularly?



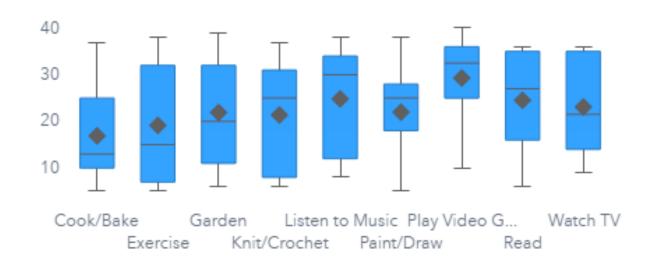
Stacked bar chart

How often do you use these cast on methods?



Box plots

How many hours a week do you ...?

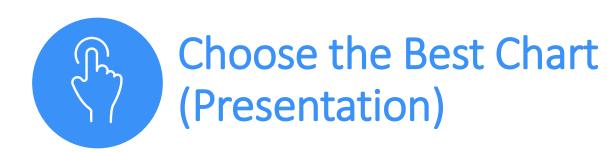


Crosstab

Average hours spent per week

Question	Answer
Cook/Bake	16.9
Exercise	19.1
Garden	21.9
Knit/Crochet	21.4
Listen to Music	24.8
Paint/Draw	22
Play Video Games	29.3
Read	24.5
Watch TV	23.1





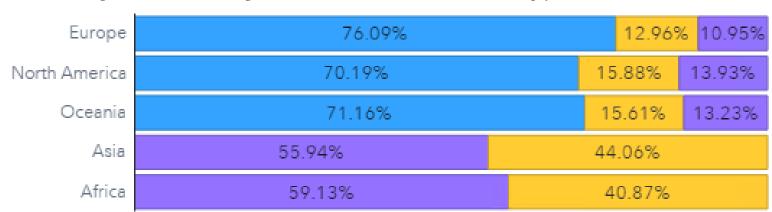
Donut chart



Describe how parts relate to the whole

Stacked bar chart

Quantity Ordered by Continent and Order Type



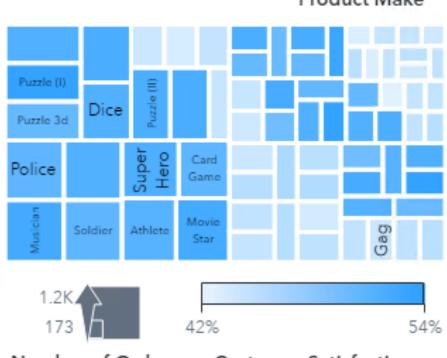
Order Type Catalog Sale Internet Sale Retail Sale

Geo map



Treemap



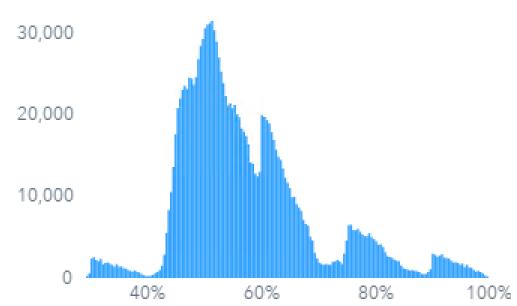


Number of Orders Cus

Customer Satisfaction

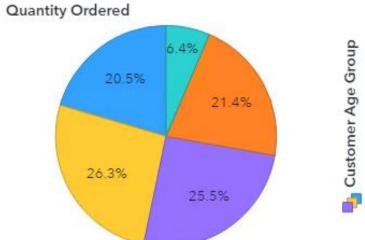
Histogram

Distribution of Vendor Satisfaction





Pie chart





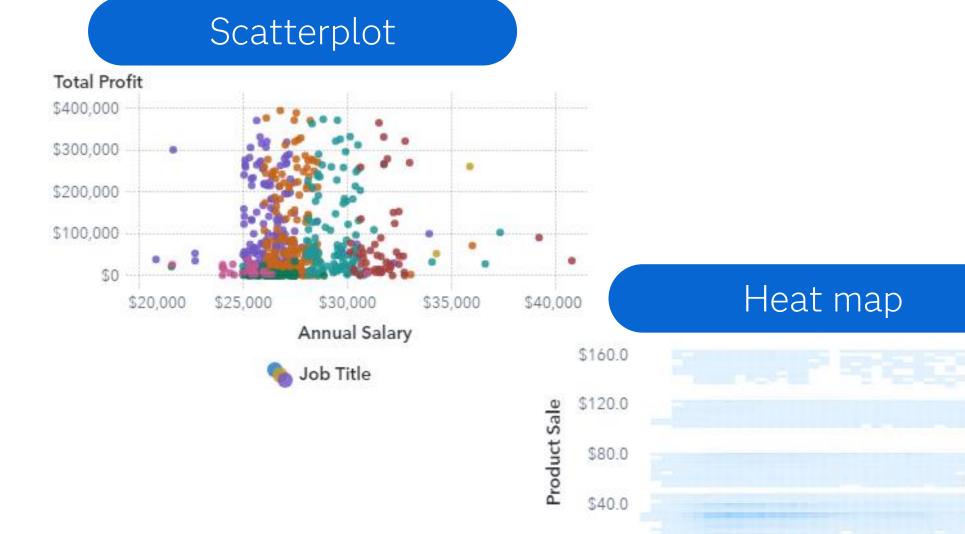
"...the only thing worse than a pie chart is several of them." – Edward Tufte

"Save the pies for dessert." - Stephen Few

Choose the Best Chart (Presentation)

Show relationships between data items

Bubble plot



\$0.0

18%

34%

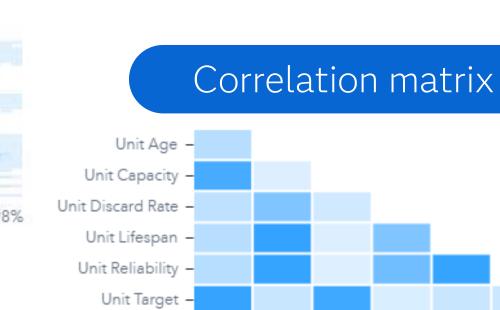
50%

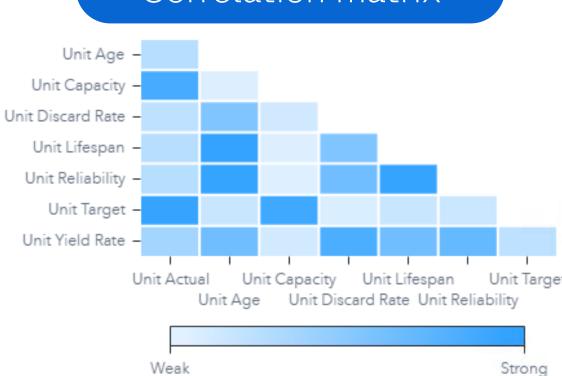
66%

Customer Satisfaction

Frequency



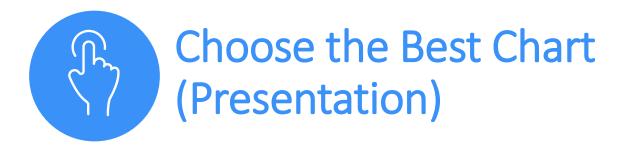






Limit digits after decimal points

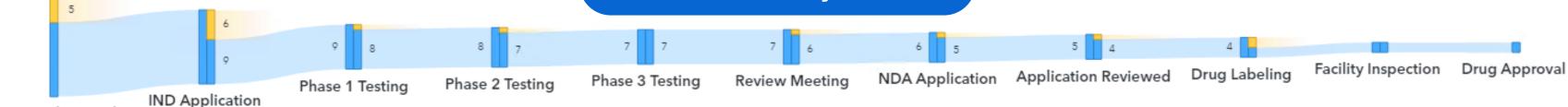




Animals Tested

Show relationships between data items

Path analysis

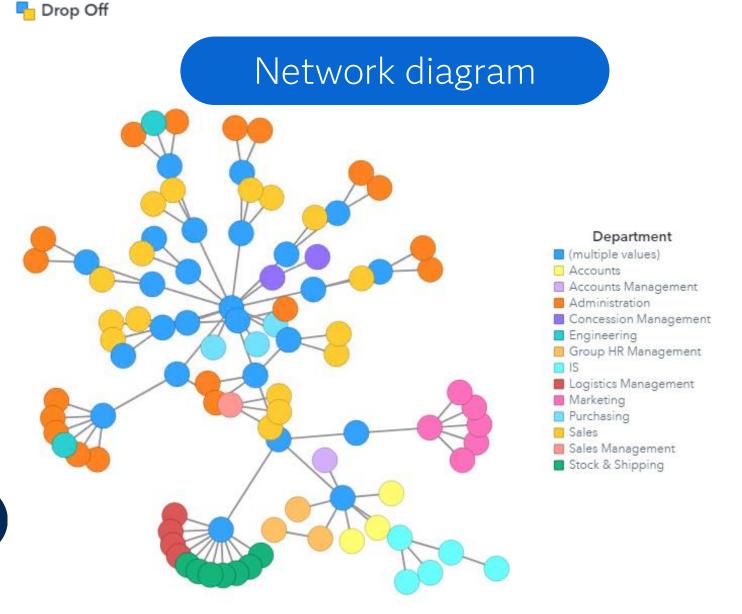


Text object

Moving To-Do List

- Schedule movers
- Obtain packing supplies
- Cancel existing utilities
- Start new utilities
- Pack
- Change address
- New driver's license
- Register car
- Register to vote
- Find new providers

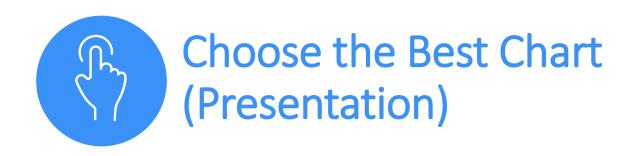






Ensure legends can be displayed on all screen sizes





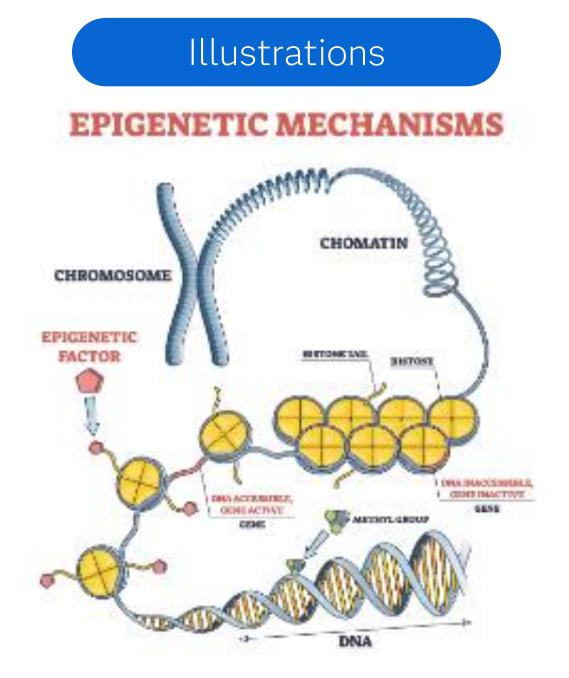
Is a graph required?

Word cloud Chicken Recipes Beef stroganoff recipes Spaghetti bolognese Brussel Sprouts Yorkshire pudding Hollandaise Sauce Chilli con carne Plant based recipes KPE maps Paricale racipa Sourdough bread Cake recipes Beef stroganoff Wishing Chili Vegan recipes Moutu Pacipe Brown bread racipe Creamed spirach racipes Hot cross buns Bread racipes



Text object

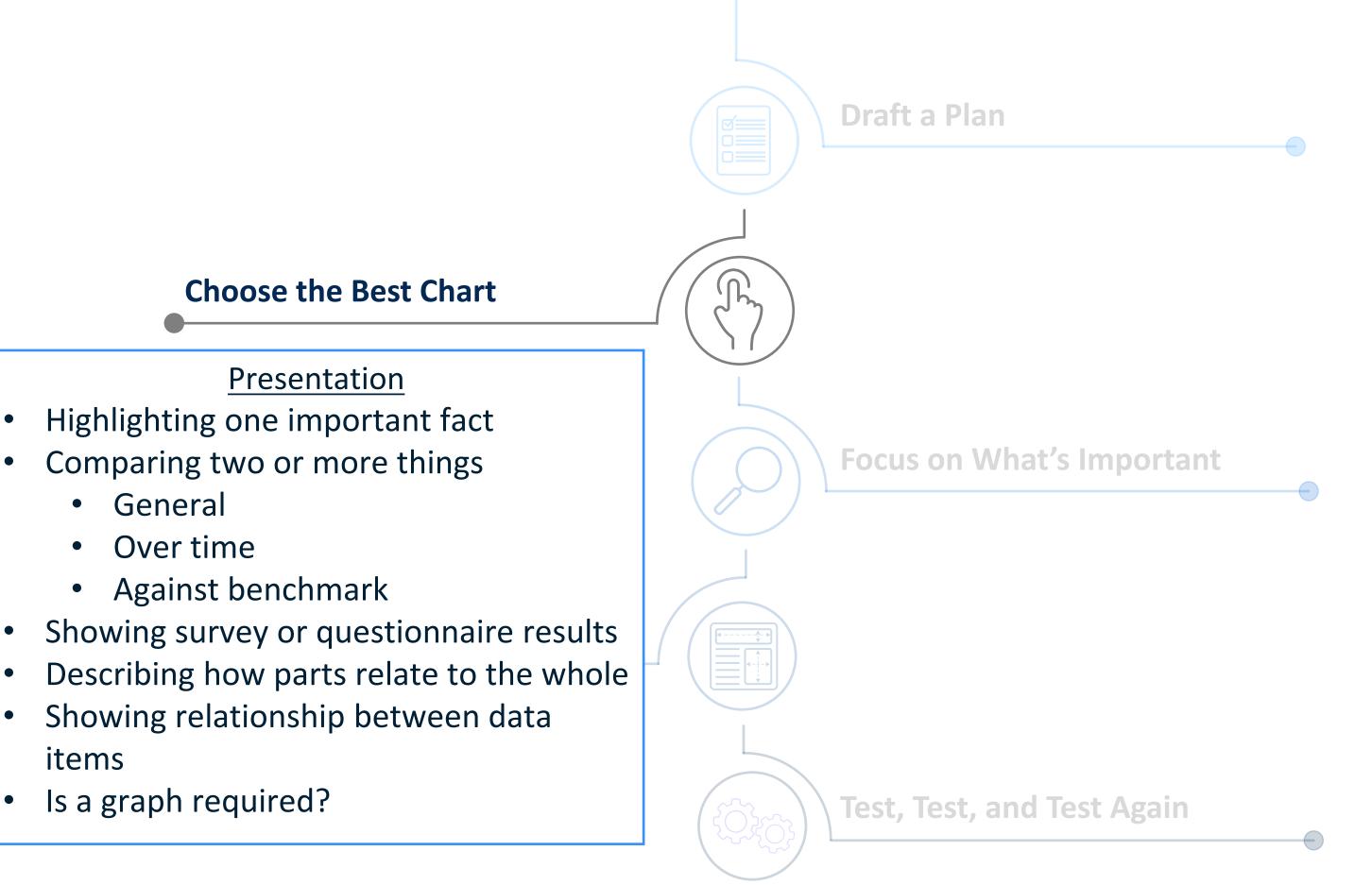
Average customer satisfaction is higher in South America, but average product quality is the same. Perhaps the additional product lines in Europe (Kiosk, Bead, Store, Promo, and Gift) account for the lower satisfaction scores.



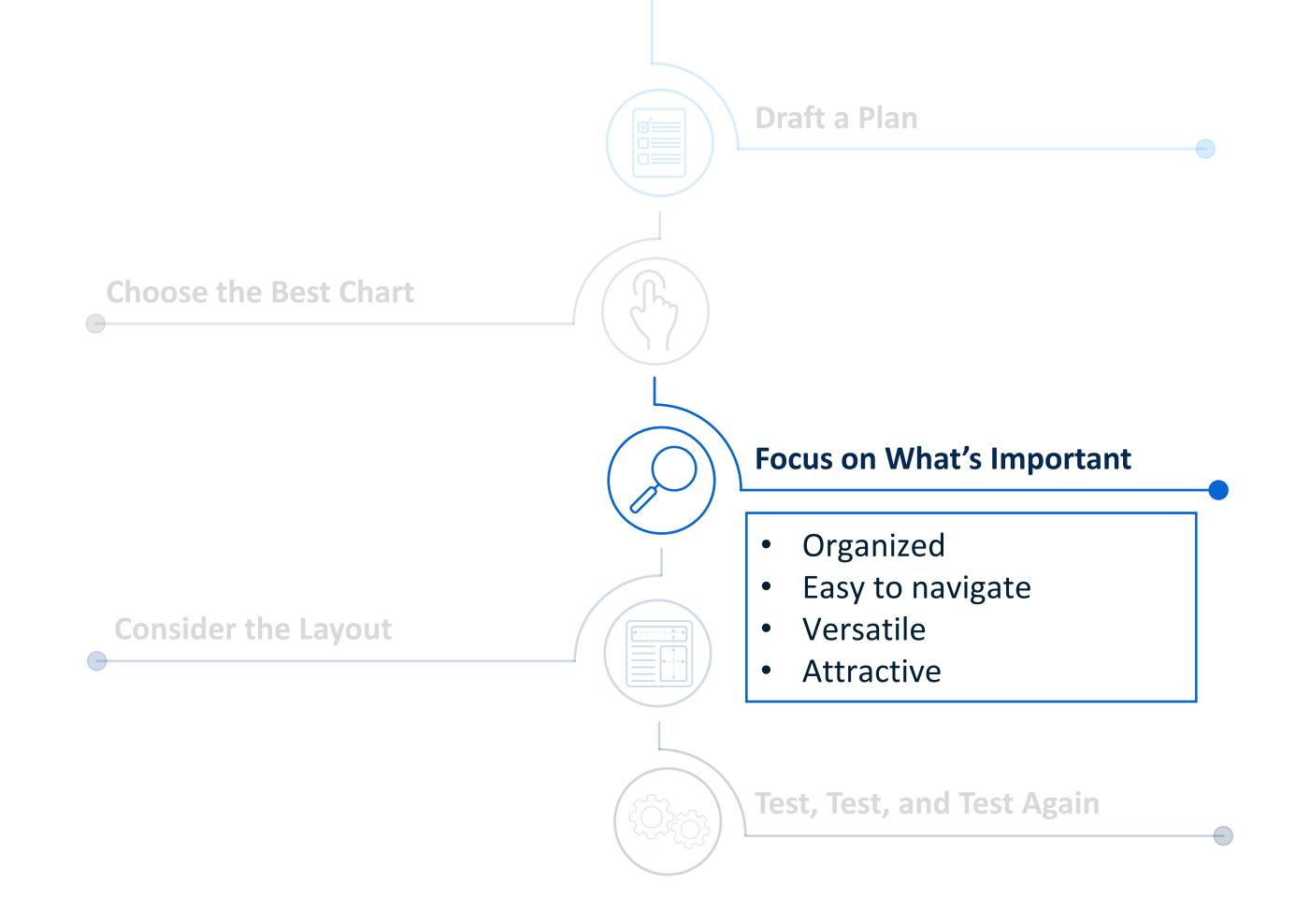


Limit sensitivity characteristics (size, shape, position)













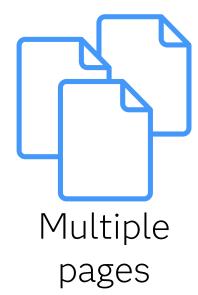
Organized

Focus on a single idea

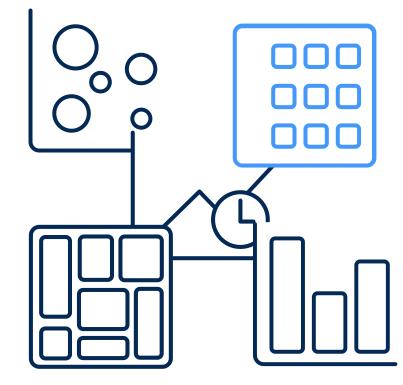


Use hidden and pop-up pages to provide details





Limit the number of objects



Stand on its own



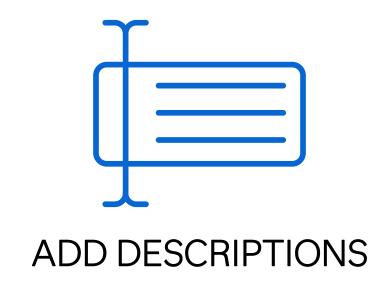
Limit the number of pages



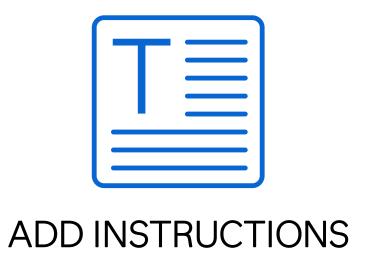








- Use clear, detailed titles
- Add additional details and numbers, when needed

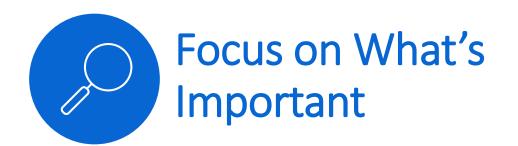


- Table of contents
- Introductory page
- Instructions for each page
- Explain report actions



Use consistent fonts, provide details for keyboard shortcuts





Versatile



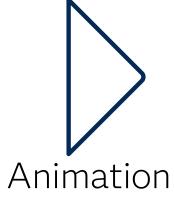
- Focus on important values
- Identify leaders or laggers



- Add interactivity
- Aid in self discovery



- Modify options
- Change chart types
- Select the data



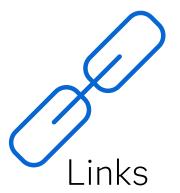
View changes over time

• Focus on differences



Prompts

- Focus on specific areas
- Filter report or page



Provide additional information



Use automatic actions to speed up development



Attractive





Excitement Danger
Energy Revolution
Passion
Love

Happiness Cowardice
Optimism Caution
Warmth
Joy

Nature Depression Freshness Jealously Wealth Youth

Warmth Autumn Visibility Harvest Royalty Wealth Nobility Honor Immortality Sadness
Peace
Trust
Security

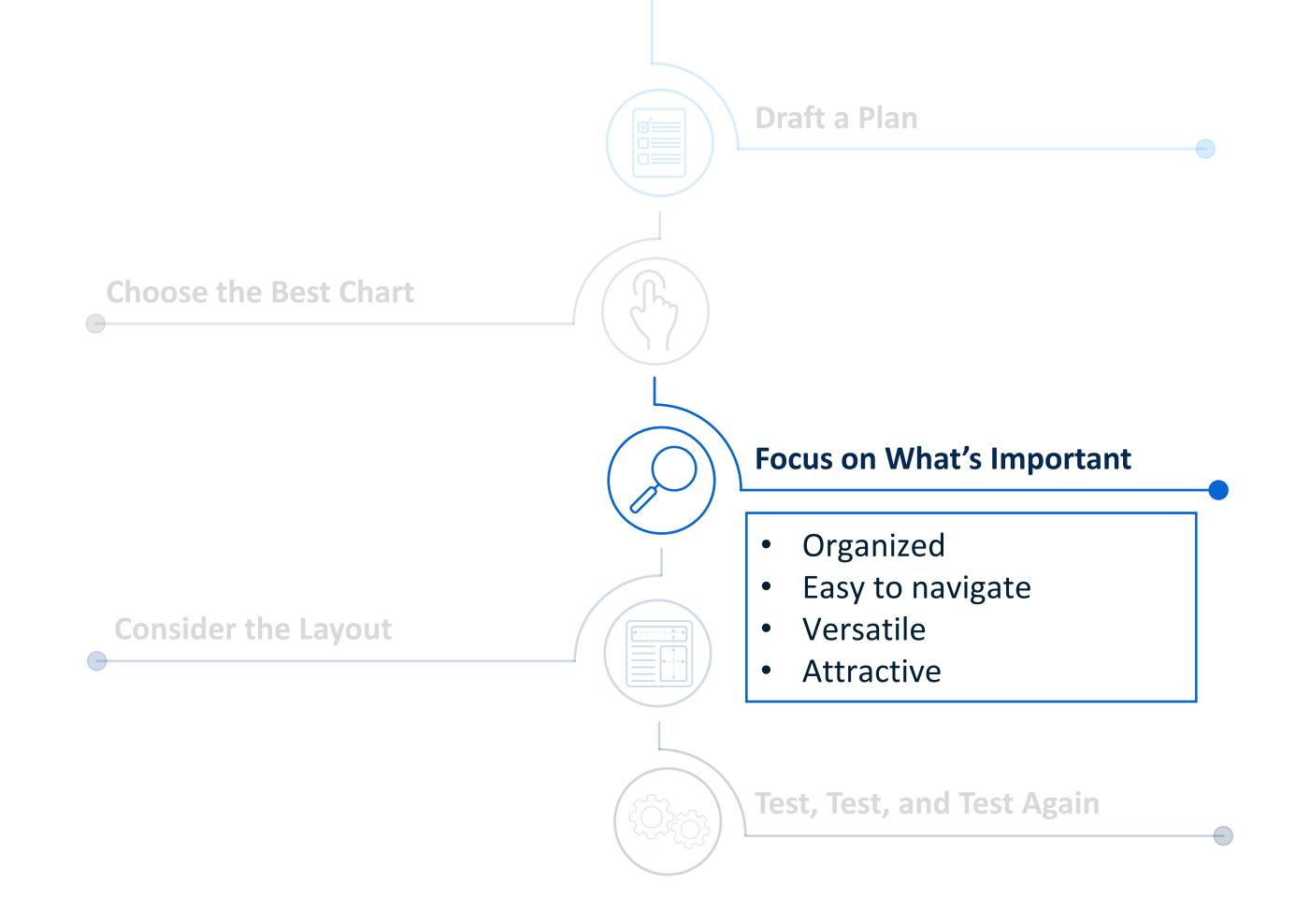
Purity
Elegance
Peace
Cleanliness

Sophisticati
on Death
Mystery Mourning
Formality Illness

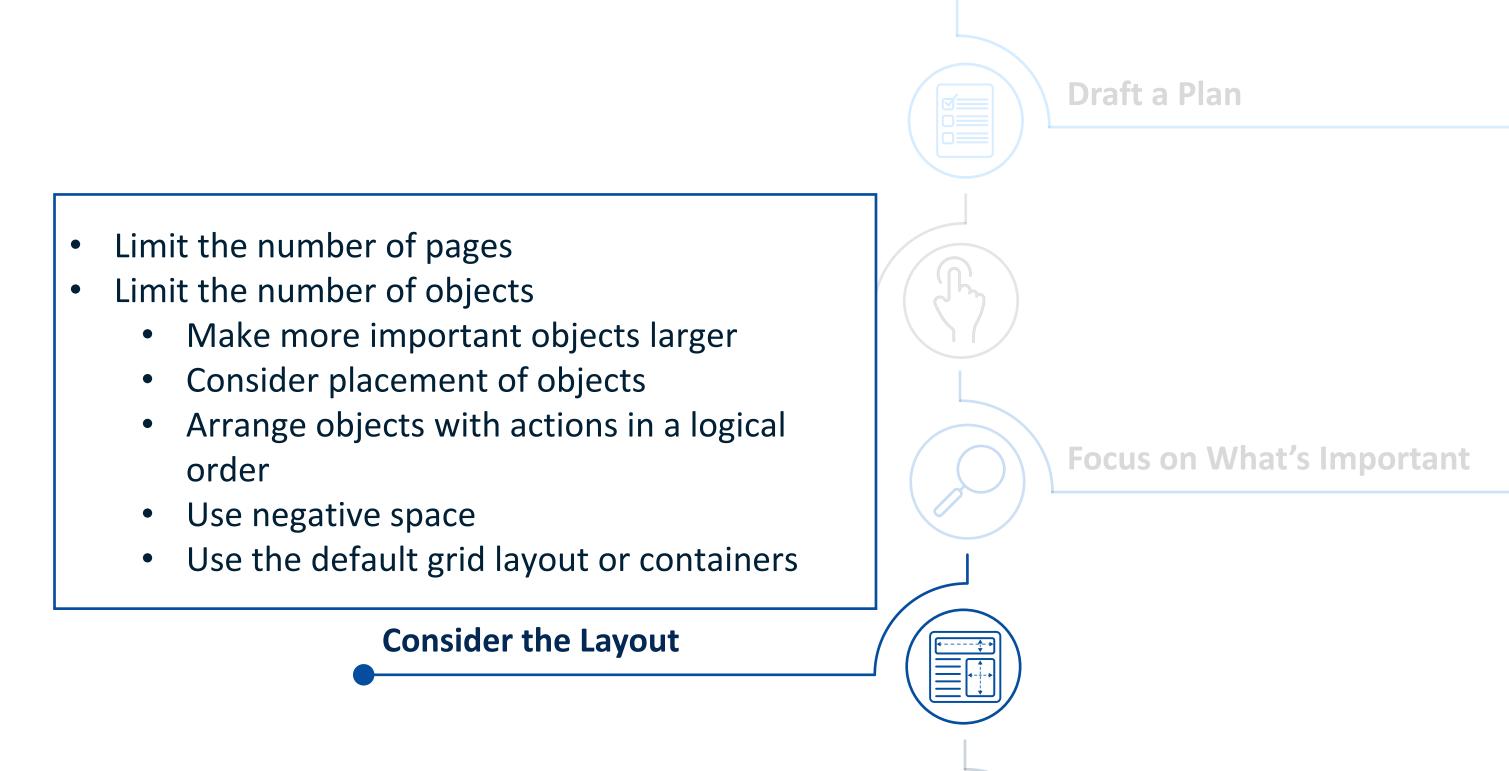


Specify labels for display rules, choose WCAG-compliant colors









Test, Test, and Test Again





Limit the number of pages

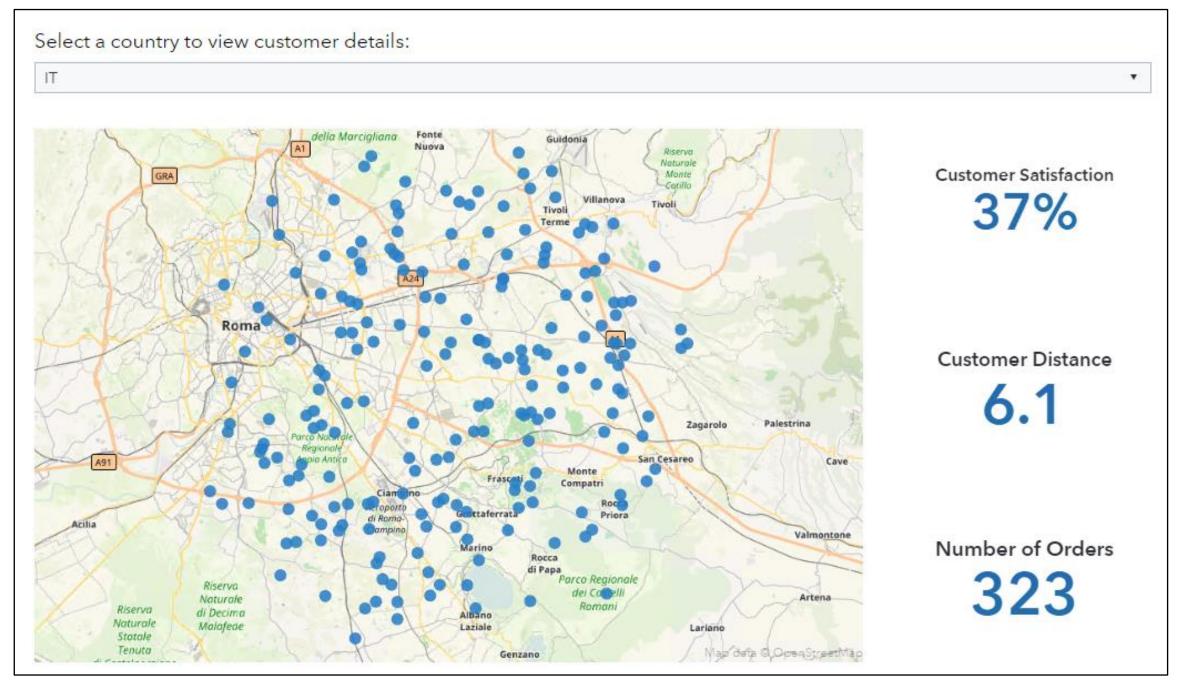
Table of Contents : Draft a Plan Choose the Best Chart Focus on What's Important Consider the Layout Test, Test, and Test Again

- Arrange the pages to advance your data story
- Limit the number of pages (less than 6)
- Add a table of contents or introductory page
- Use page links to control navigation
- Use pop-up pages to provide additional details





Make more important objects larger





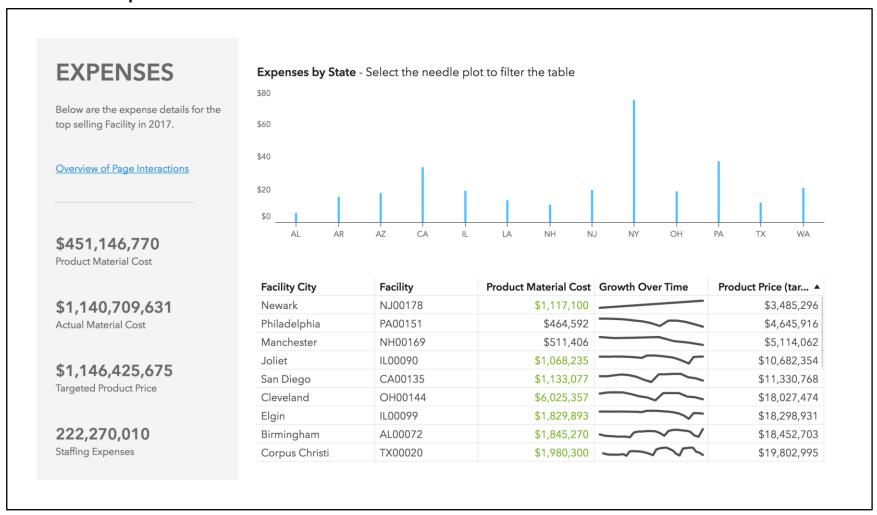
Use page templates to speed up development



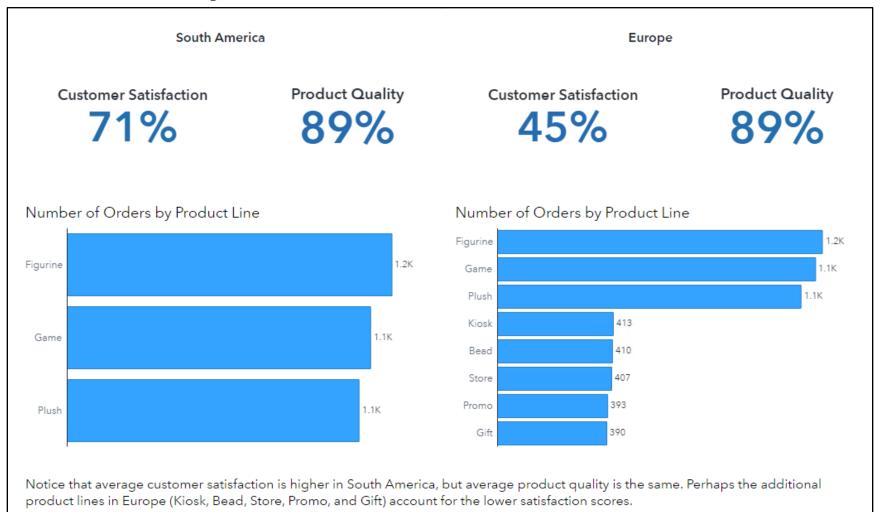


Consider the placement of objects

Focal point



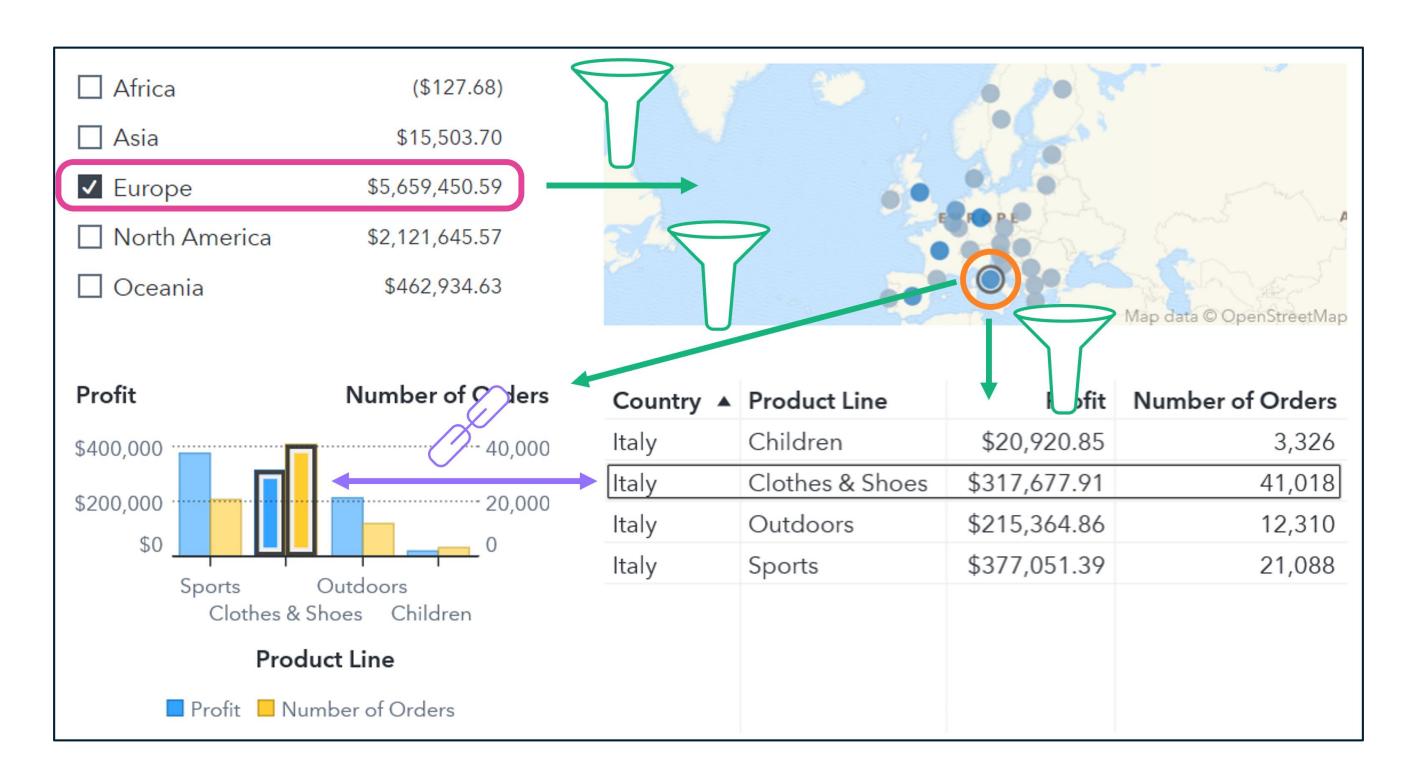
Related objects







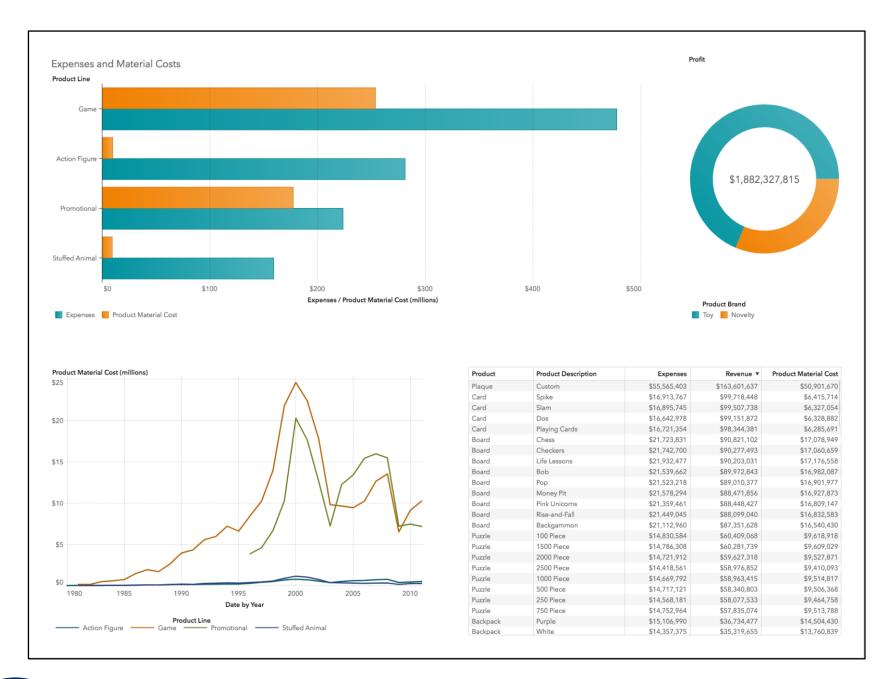
Arrange objects with actions in a logical order





Consider the Layout

Use negative space







Use caution when modifying padding from default

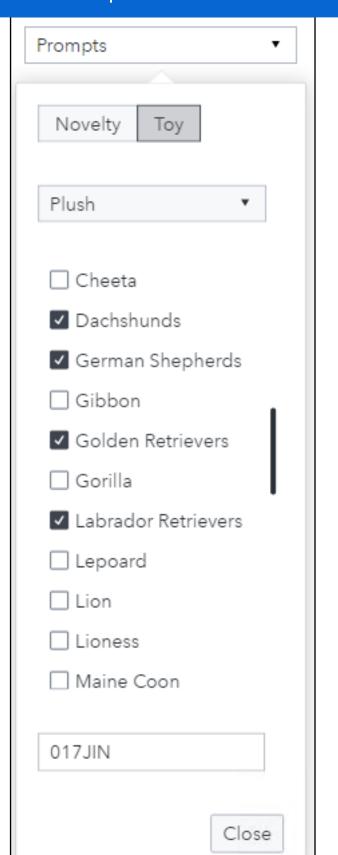




Consider the Layout

Use the default grid layout or containers

Prompt container



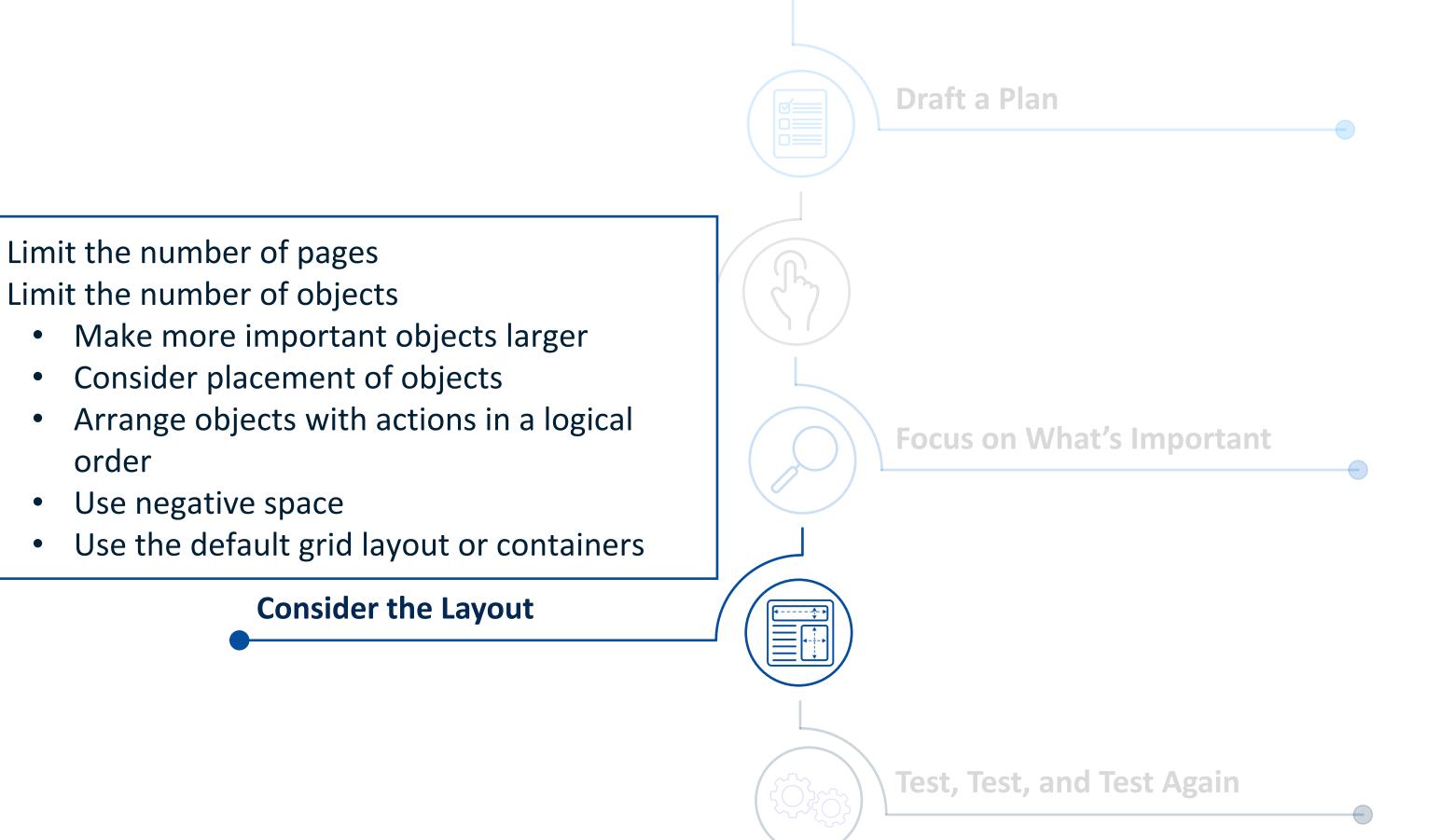
Stacking container



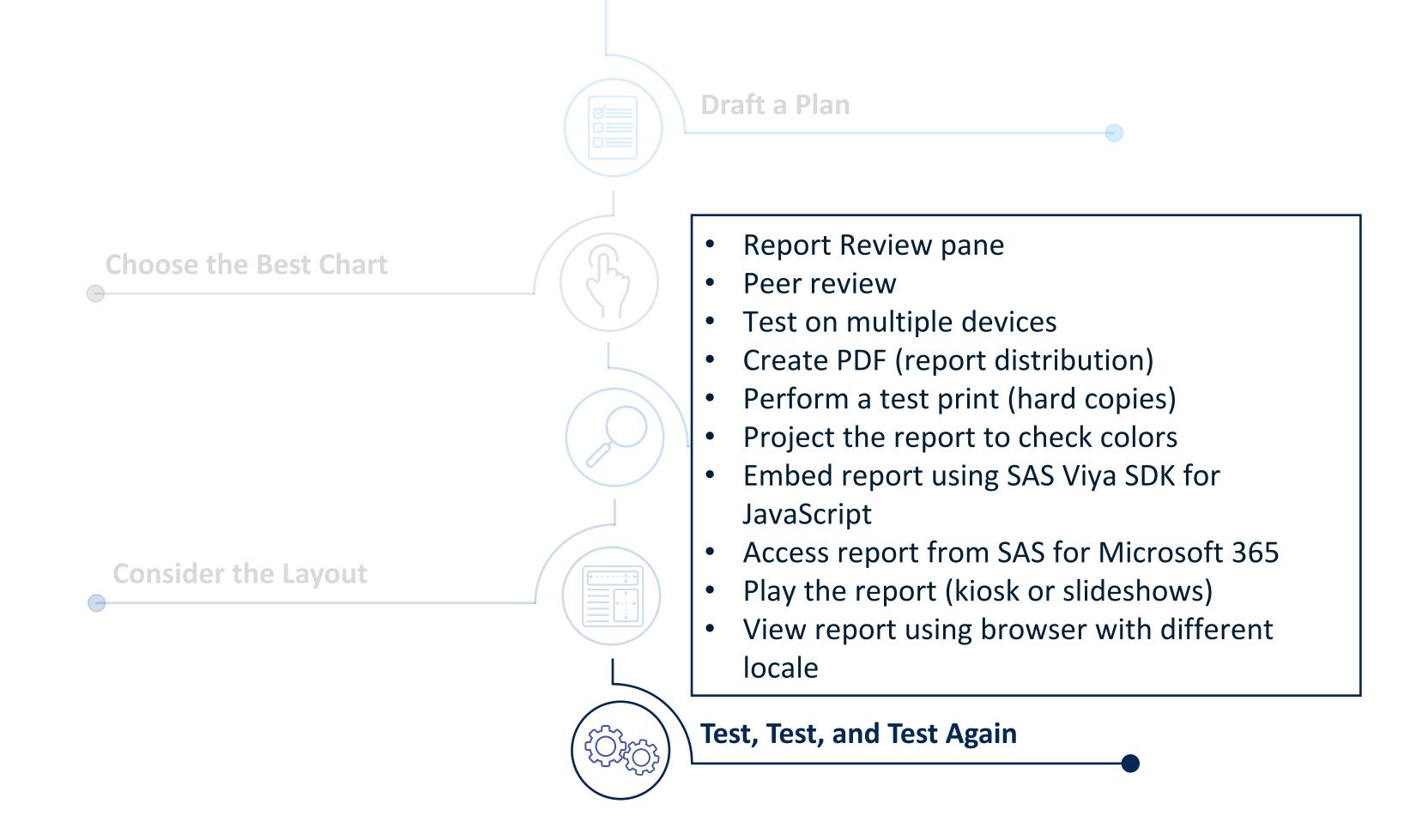
Scrolling container **Customer Analysis** Select a country to view customer details: **Customer Satisfaction** Number of Orders **Customer Distance** 37% 323 6.1

- - -

Avoid precision containers



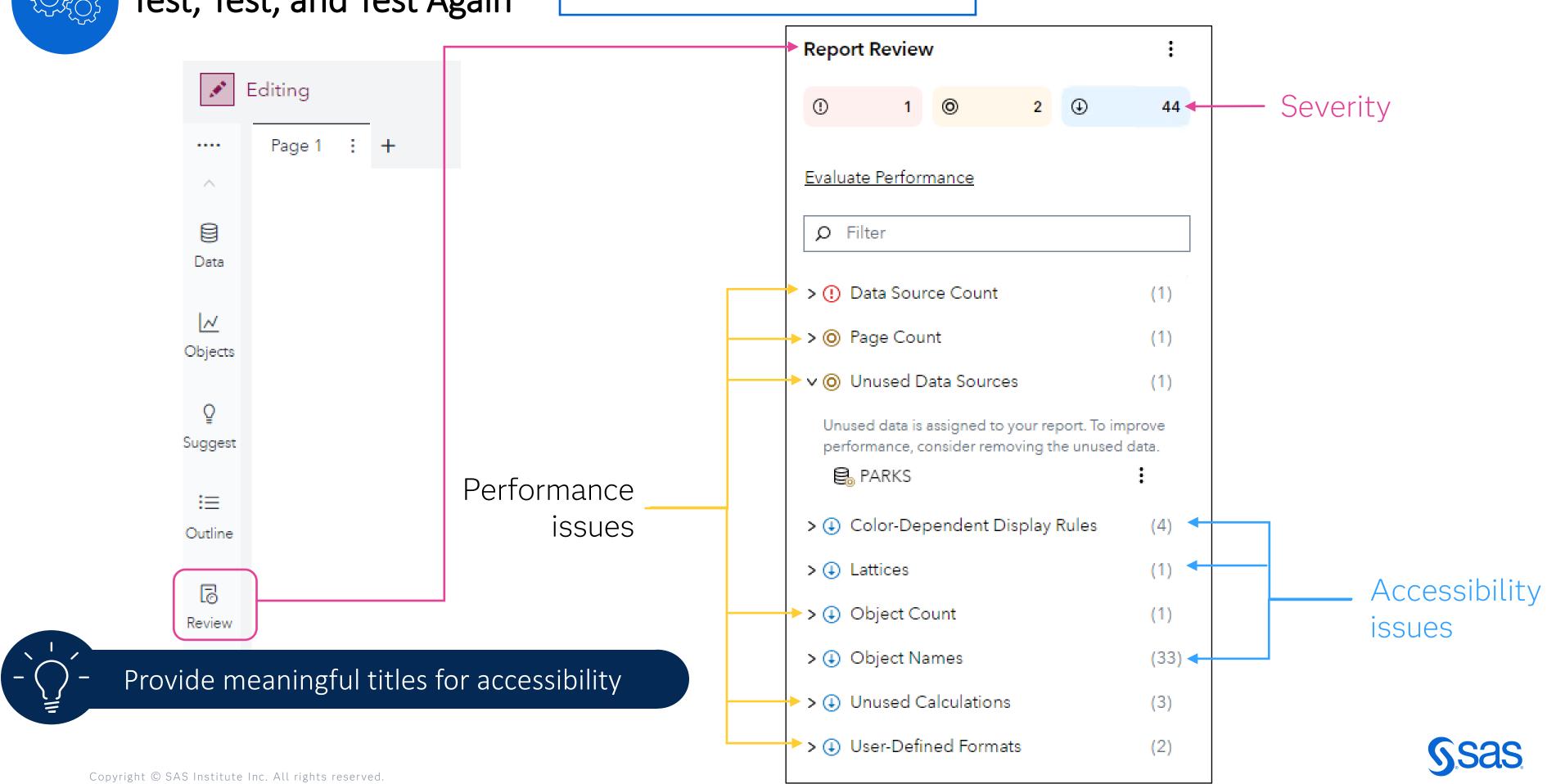






Test, Test, and Test Again

Report Review pane



Test, Test,

Peer review

Did all the

actions

Test, Test, and Test Again



What is the story?

Did you get lost?

Is the report easy to navigate?

features apparent?

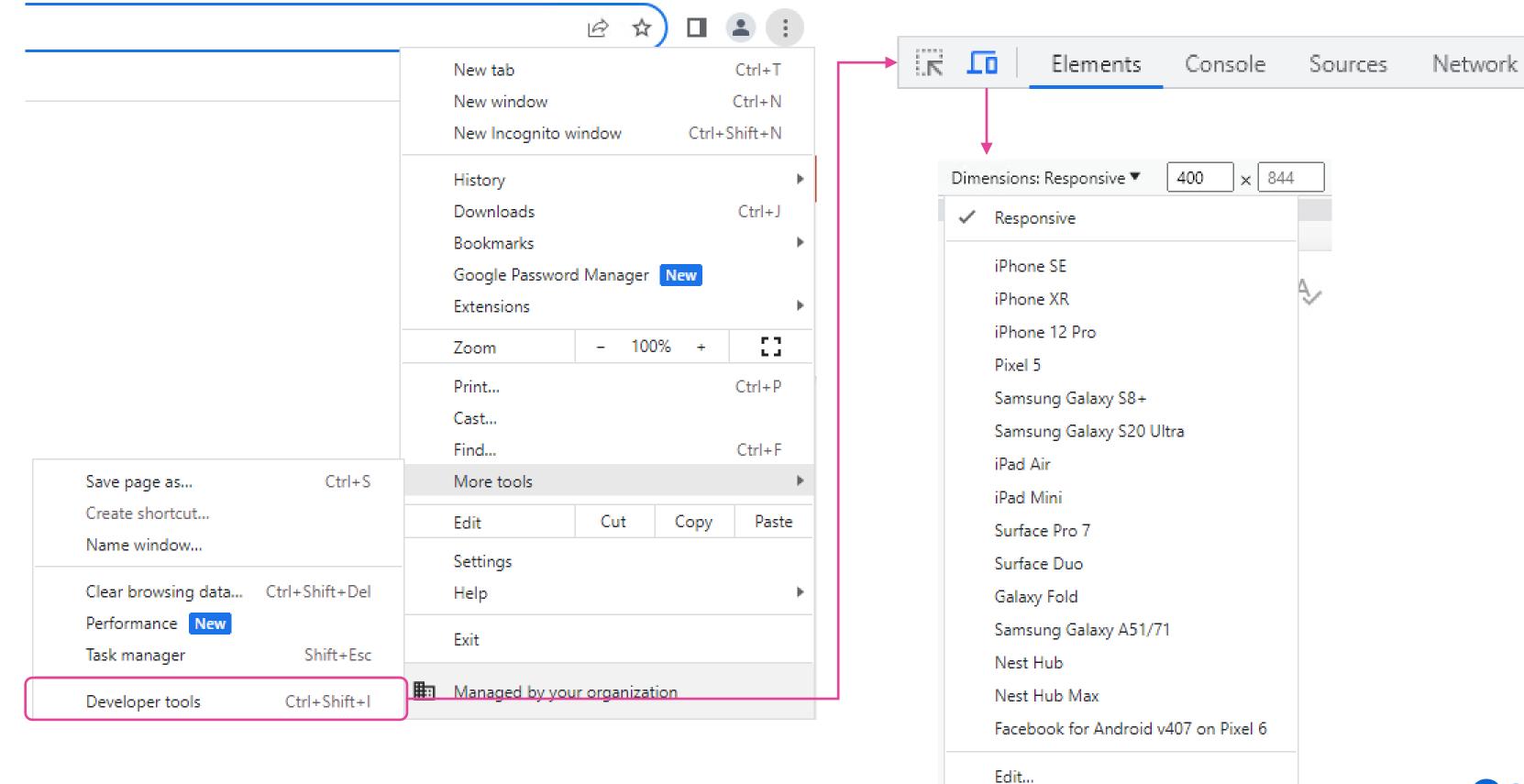


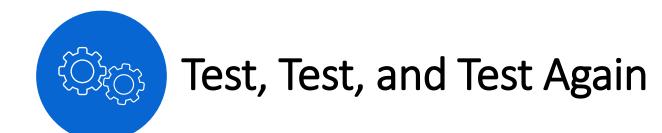




Test, Test, and Test Again

Test on multiple devices

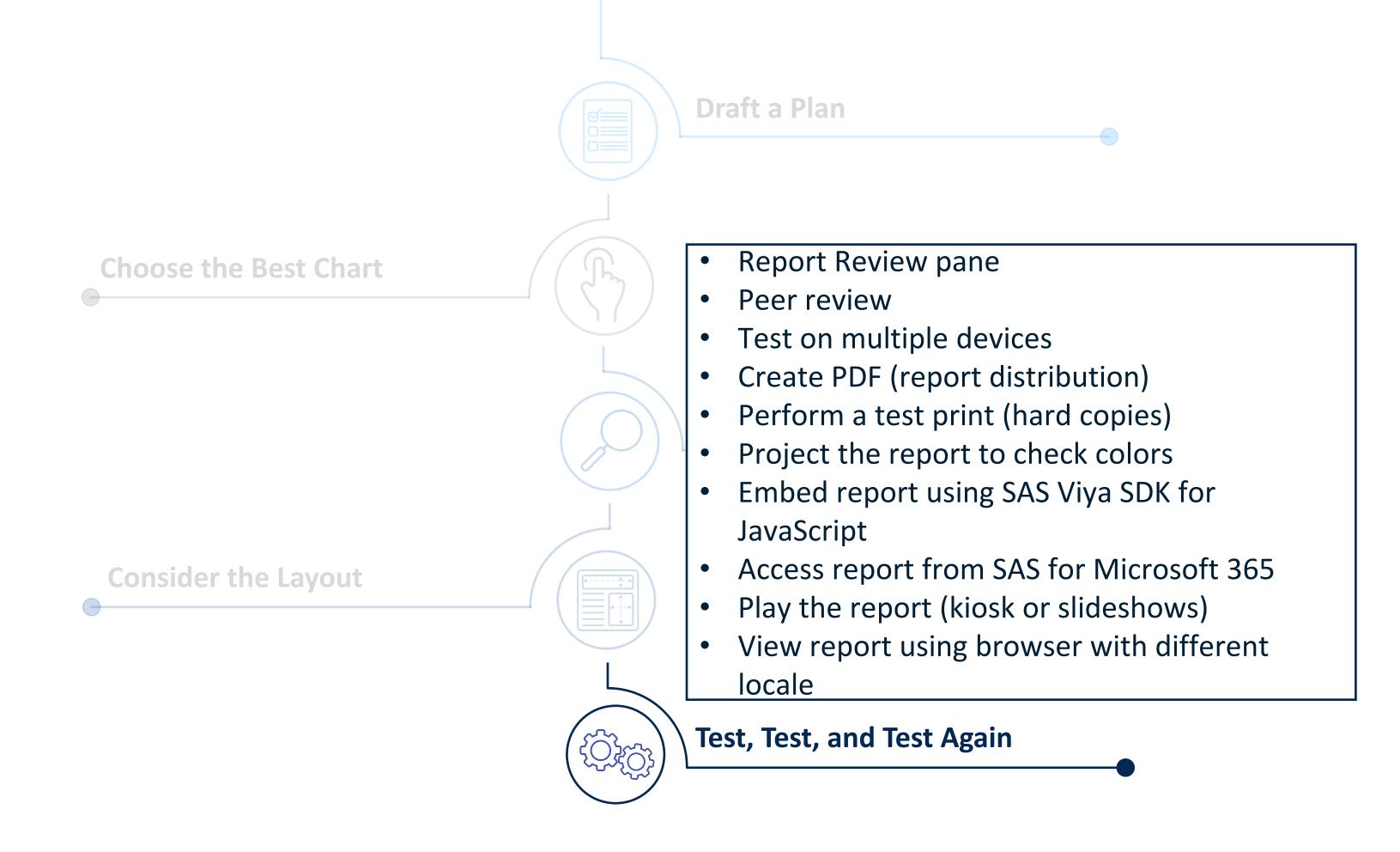




Other tests

- Create PDF (report distribution)
- Perform a test print (hard copies)
- Project the report to check colors
- Embed report using SAS Viya SDK for JavaScript
- Access report from SAS for Microsoft 365
- Play the report (kiosk or slideshows)
- View report using browser with different locale







Handy Links

Beautiful Reports

Creating Accessible Reports Using SAS Visual Analytics

Envisioning Information by Edward Tufte

Gallery of SAS Visual Analytics Objects

Telling Your Data Story by Atrin Assa

<u>Tips and Techniques for Designing the Perfect Layout with SAS Visual Analytics</u> by Ryan Norris and Brian Young

<u>Tips for Building Rich Interaction in Your SAS Visual Analytics Reports</u> by Jeanne Marie Tan and Sierra Shell

SAS Visual Analytics Stories are Data With a Soul by Ted Stolarczyk

The Visual Display of Quantitative Information by Edward Tufte

Types of Charts: Choose the Best Chart to Convey Your Message

Visual Explanations by Edward Tufte



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✓ Did you enjoy this session, Let us know in the evaluation





The SAS® Viya® ETL Playbook

Charu Shankar





Sas

The SAS® Viya® ETL Playbook

Charu Shankar, SAS® Institute

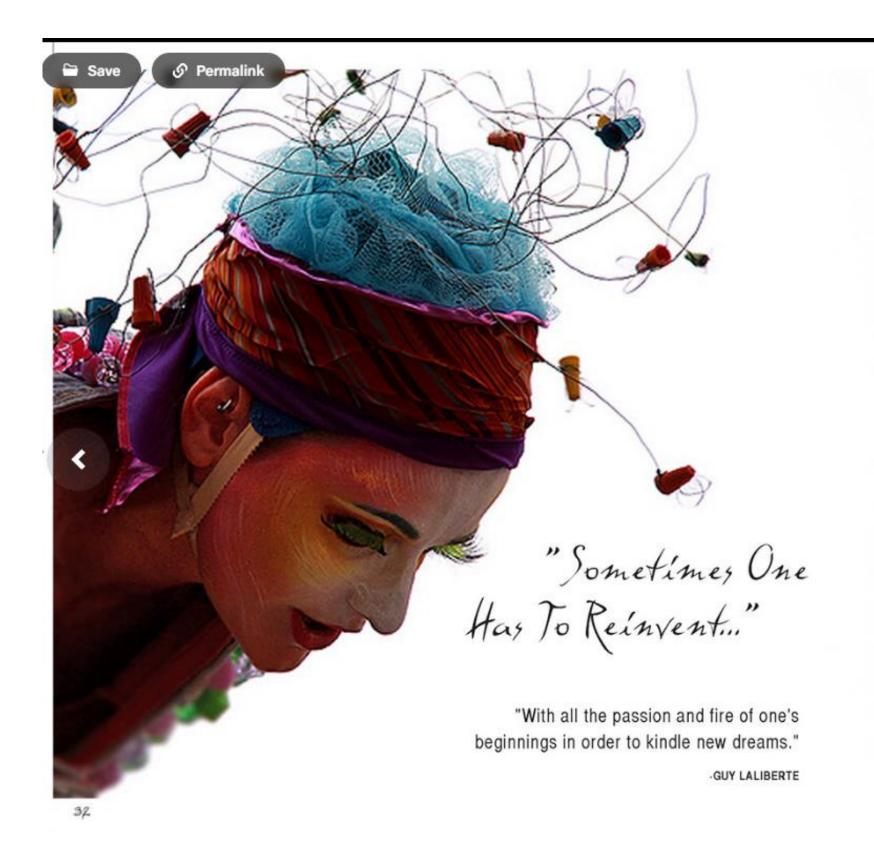
With a background in computer systems management. SAS Instructor Charu Shankar engages with logic, visuals, and analogies to spark critical thinking since 2007.

Charu curates and delivers unique content on SAS, SQL, Viya, etc. to support users in the adoption of SAS software.

When not coding, Charu teaches yoga and loves to explore Canadian trails with her husky Miko.



Data Used In This Presentation







Agenda

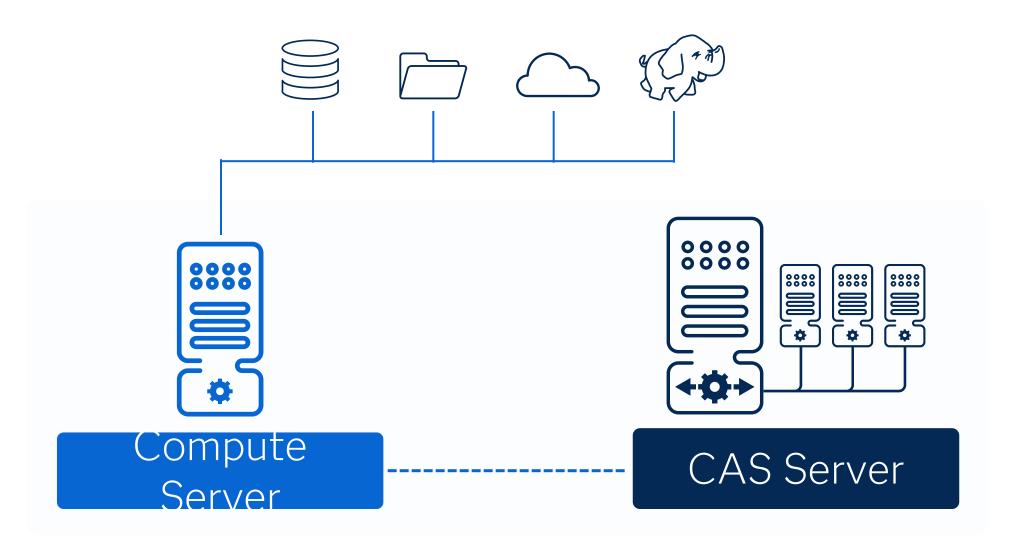
ETL or Extract, transform, and Load is an integral process for data engineers to extract data from different sources, transform the data into a trusted resource, and load that data into systems that end users such as data scientists can use for computation and analysis. In all the buzz around analytics, ETL is often relegated to the background, but data scientists depend deeply on this solid foundational task before they can deep dive into analytics.

Leverage the power of the Cloud to extract, transform and load data using SAS programs executed in the SAS Viya Compute Server. The good news is that if you are already programming in SAS 9, you'll feel right at home in Viya!

- 1 Introduction
- 2 Servers on SAS 9 vs. SAS Viya
- 3 Live Demo



SAS Viya Compute Server Overview

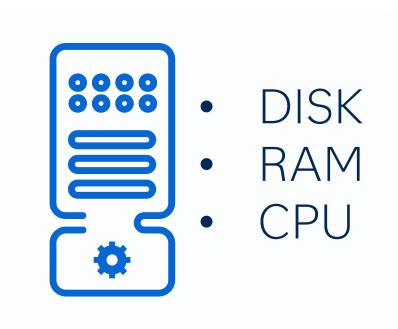


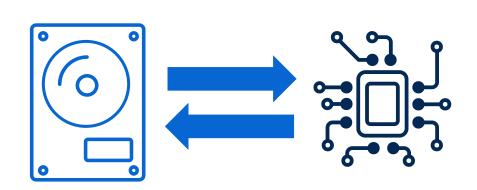




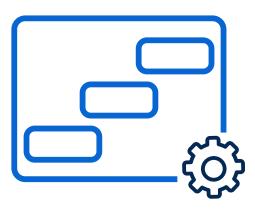




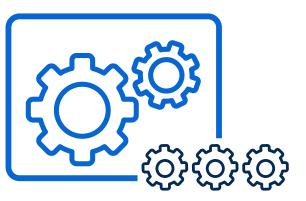




Data is transferred from disk to memory.



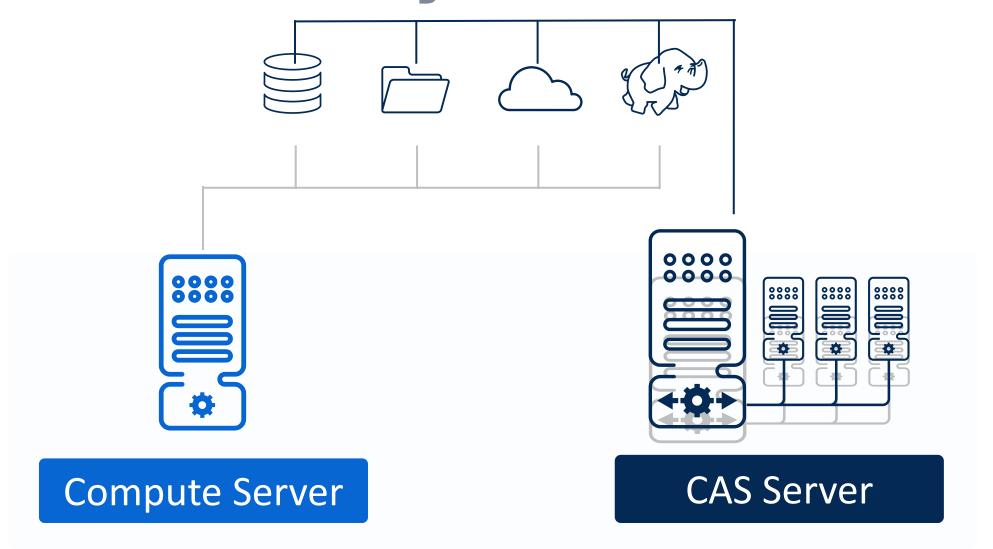
DATA step is processed single-threaded.



Many PROCS are multithreaded.



CAS Server on SAS Viya









Parallel

Processin Memo

SAS Viya



SAS Viya Servers and Processing Environments

SAS Viya

Traditional SAS processing engine

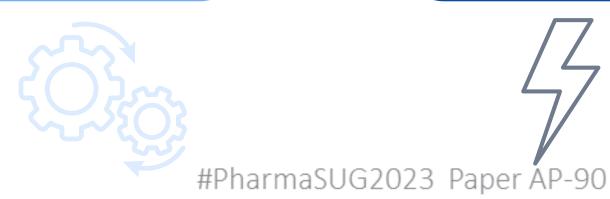


Next-gen SAS processing engine

Executes traditional SAS®9 code

SAS Compute Server SAS Cloud Analytic Services (CAS)

Executes CAS-enabled code in parallel on in-memory data





SAS Viya Servers

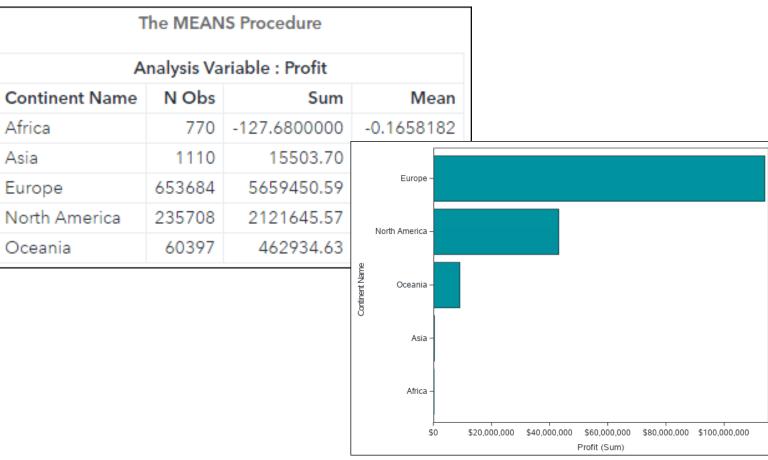
SAS Compute Server

Standard SAS code executes on the SAS Compute Server.

```
libname pvbase "&path/data";

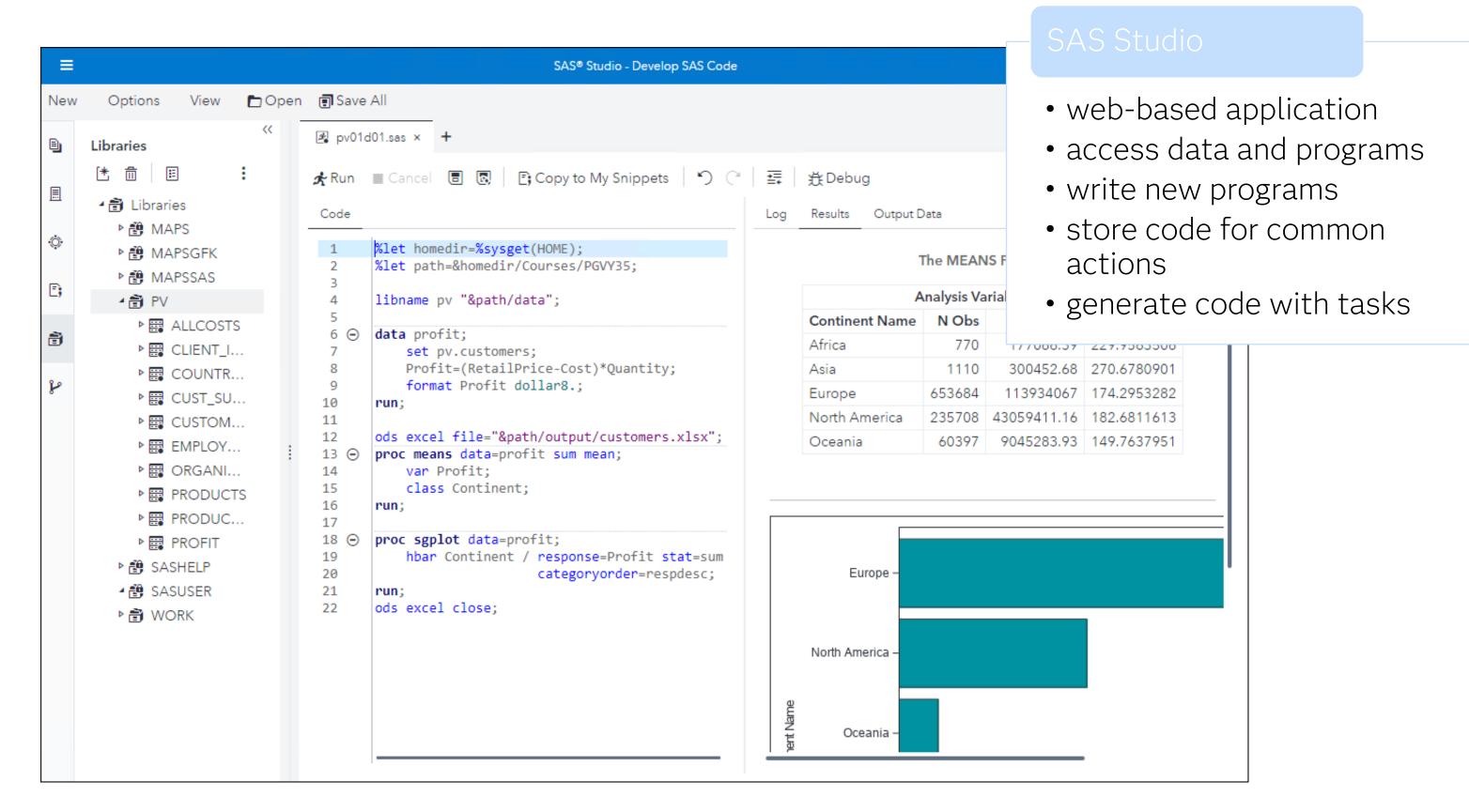
data profit;
    set pvbase.orders;
    ...
run;

proc means data=profit;
    ...
run;
```



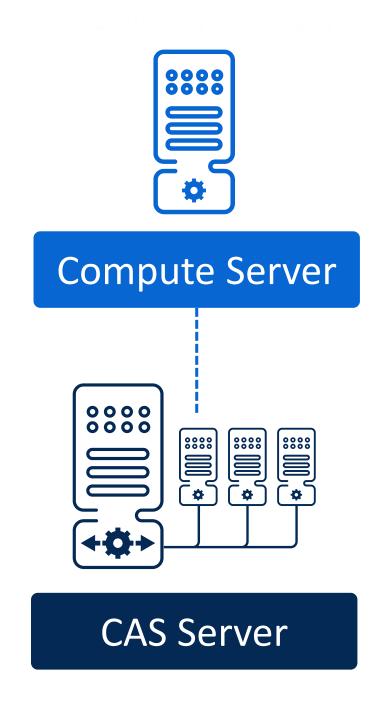


SAS Viya Programming Interface



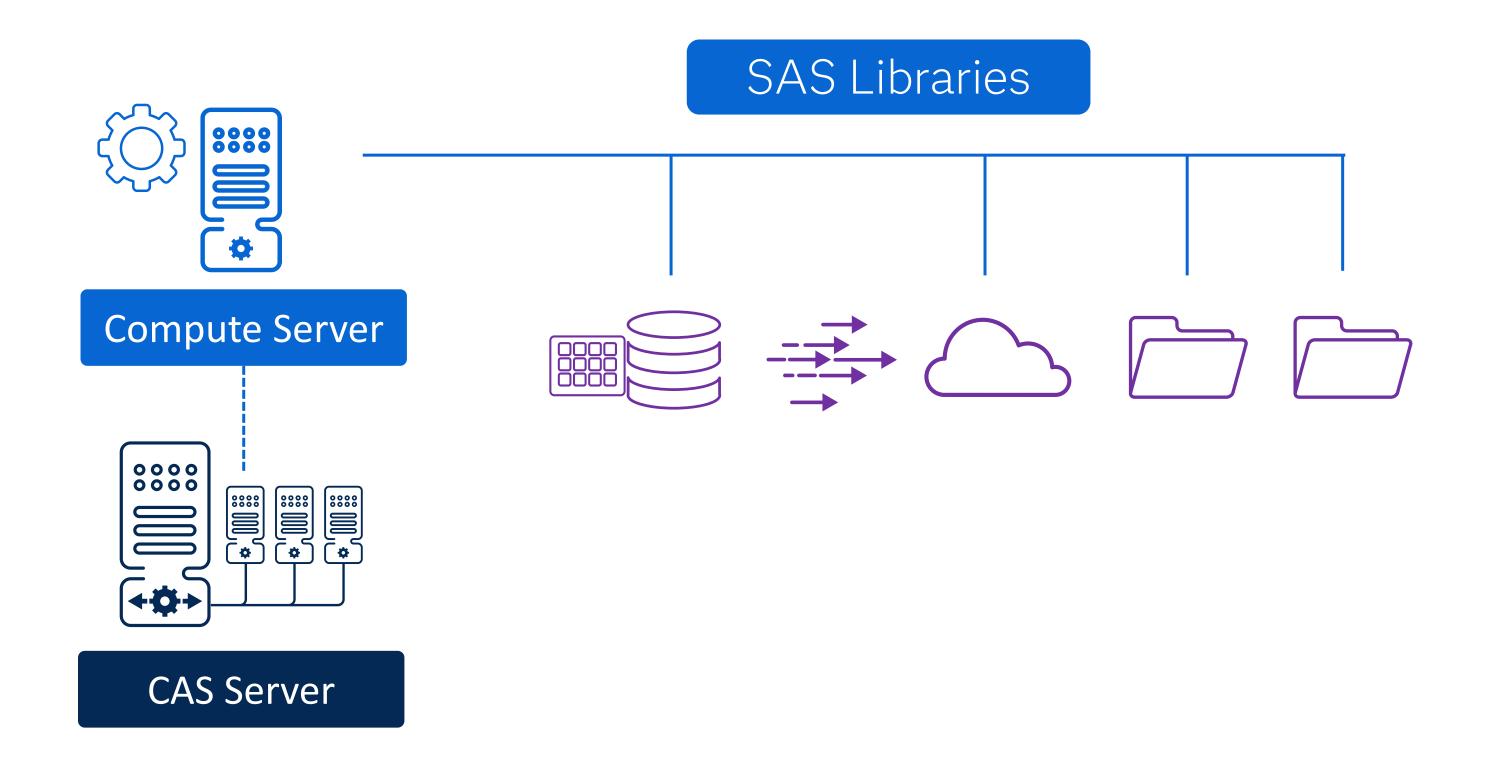


Accessing Data Sources with Compute or CAS

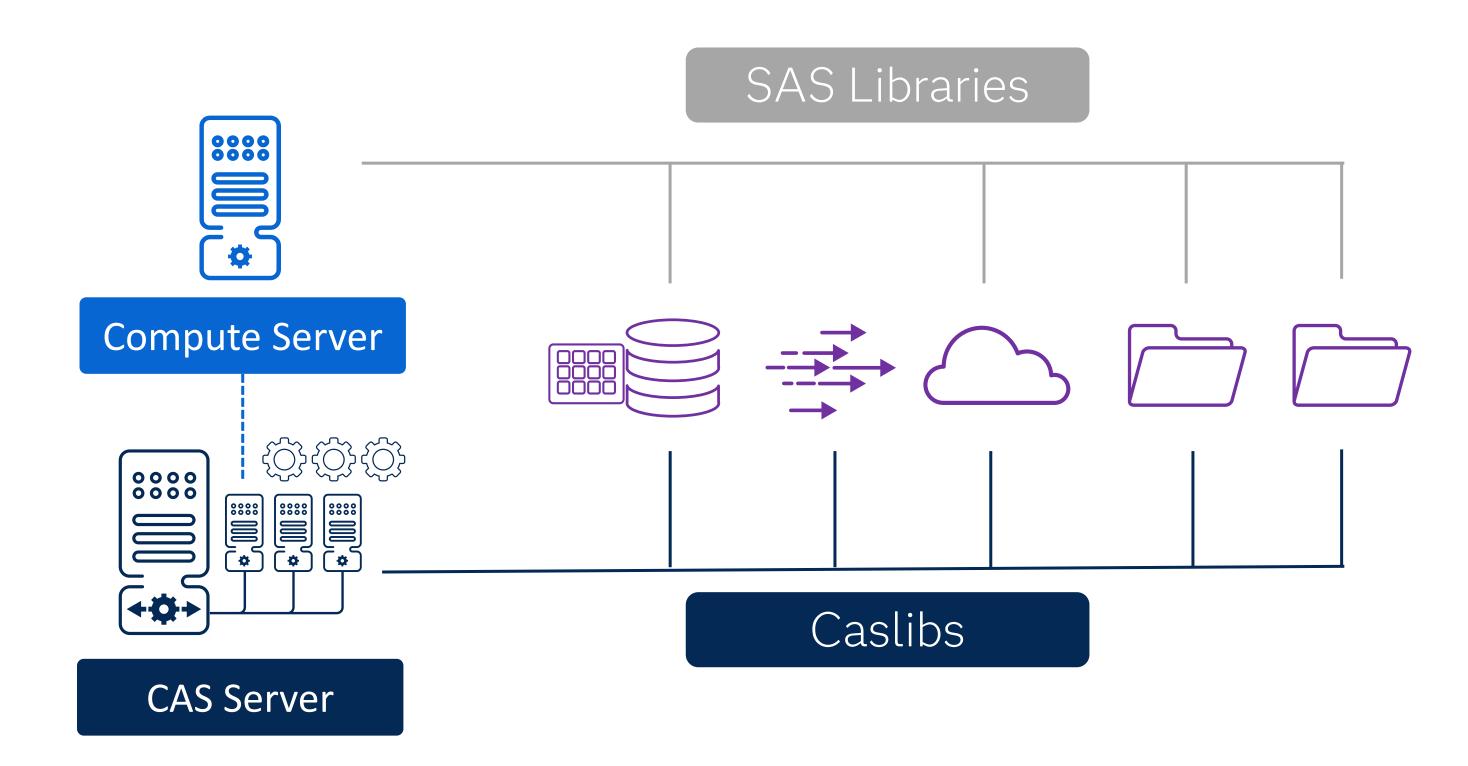






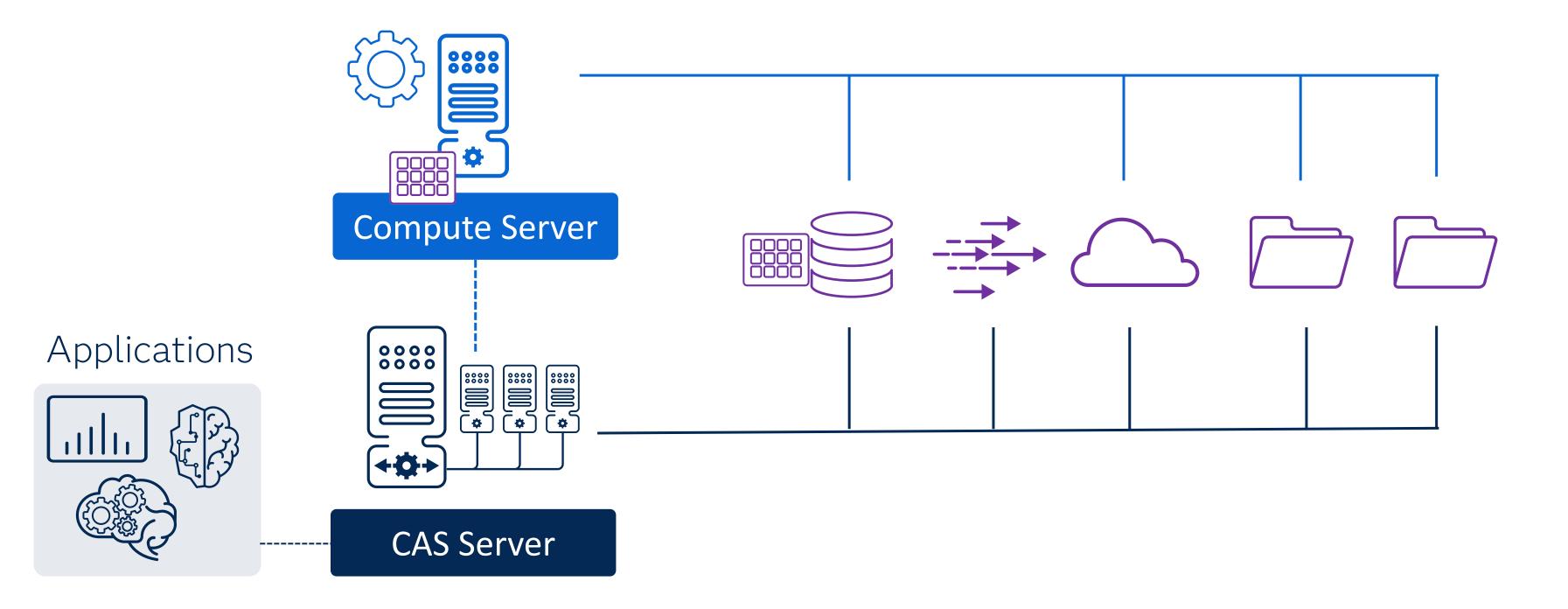






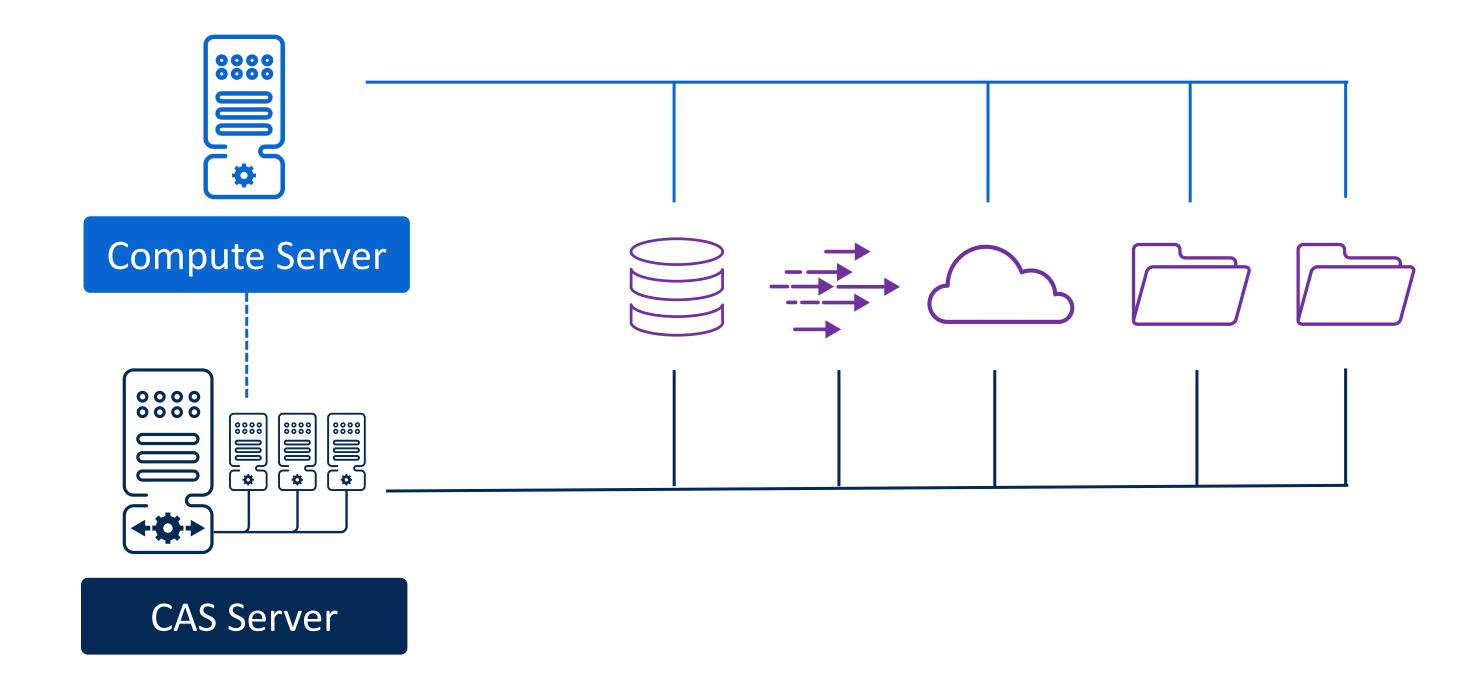


You can transfer data from Compute to CAS.





Depending on the **data size** and your **objectives**, you will want to read the data from the data source into the **appropriate server**.

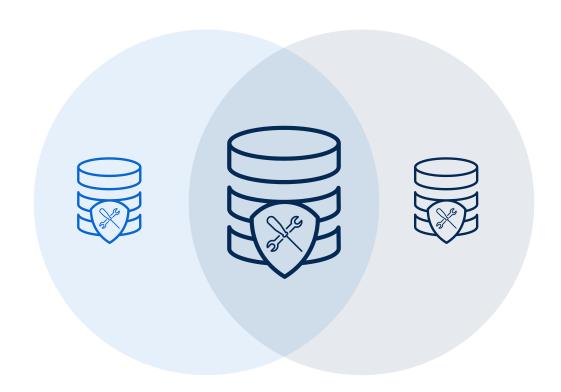


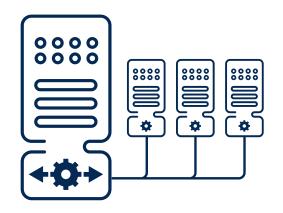


Data Sources



SAS/ACCESS Interfaces

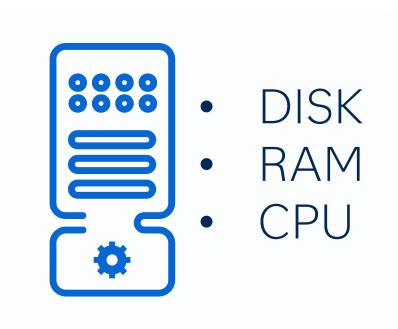


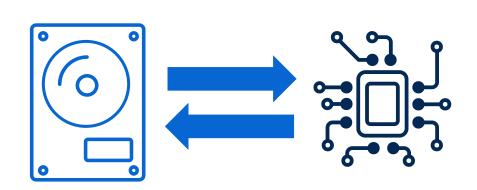


CAS Server

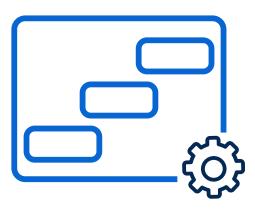
SAS Viya Data Connectors



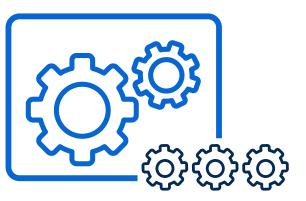




Data is transferred from disk to memory.



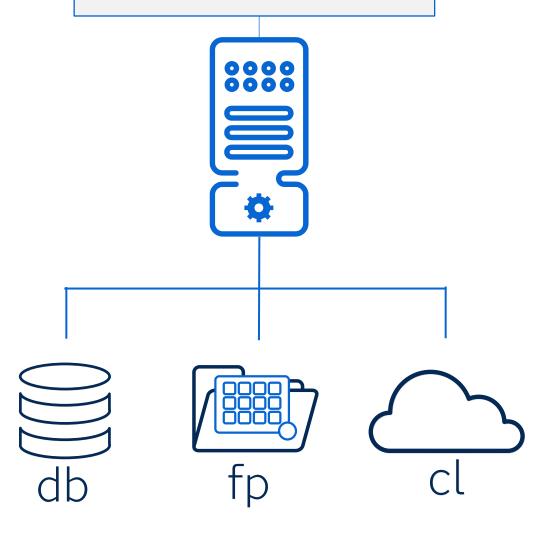
DATA step is processed single-threaded.



Many PROCS are multithreaded.



memory



SAS libraries

- 1
- data fp.final;
 set fp.new;
 run;
- proc freq data=fp.new;
 run;
- proc means data=fp.new; run;

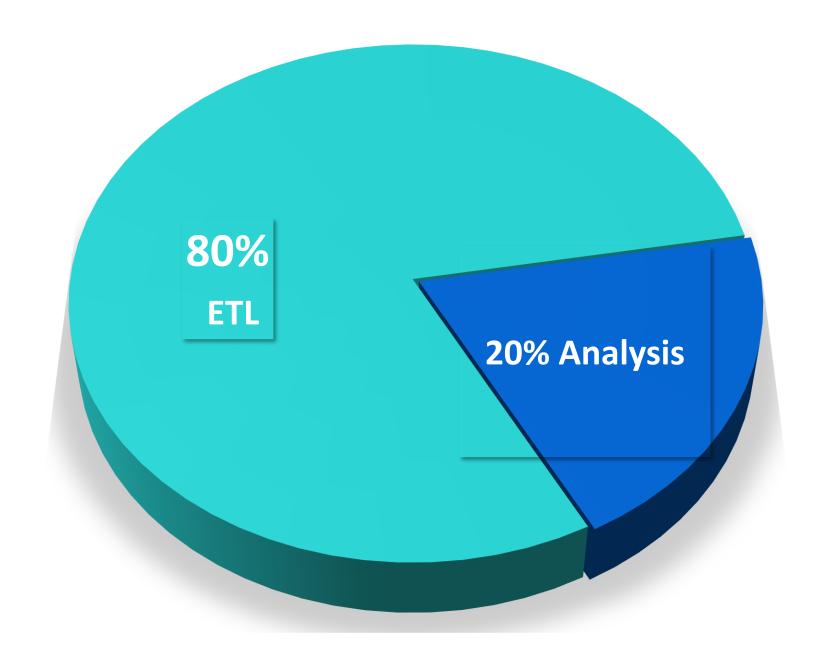
Data is loaded and unloaded from memory three times.



1 Introduction

ETL Purpose

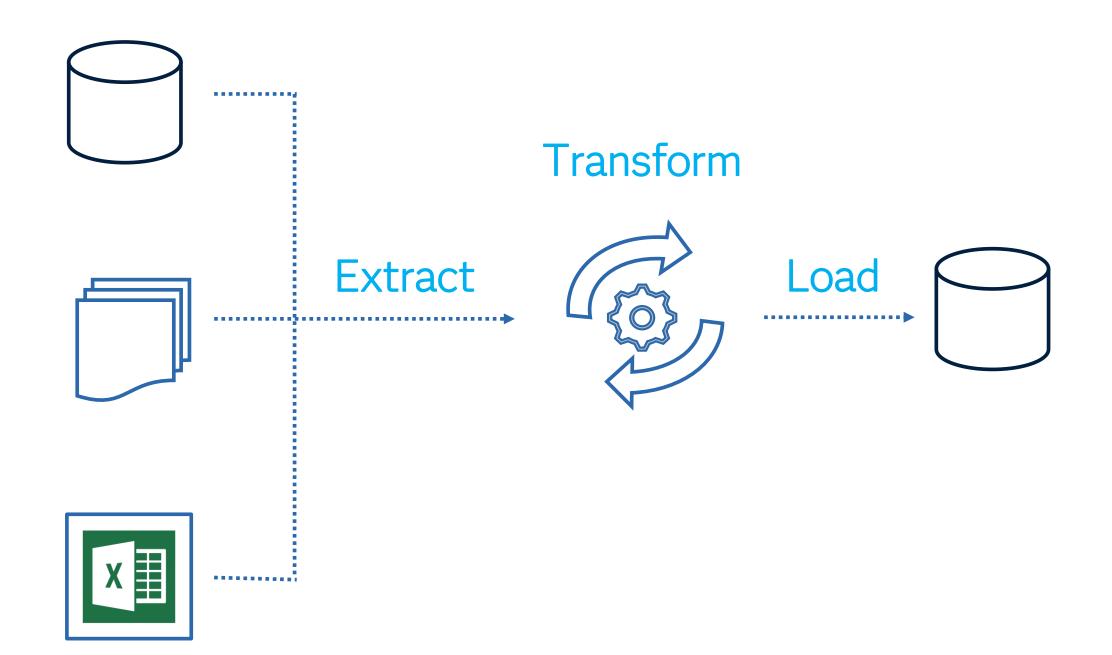
ETL allows businesses to consolidate data from multiple databases and other sources into a single repository with data that has been cleansed and qualified in preparation for analysis. This unified data repository allows for simplified access for analysis and additional processing. It also provides a single source of truth, ensuring that all enterprise data is consistent and upto-date.





1 Introduction

ETL The Big Picture

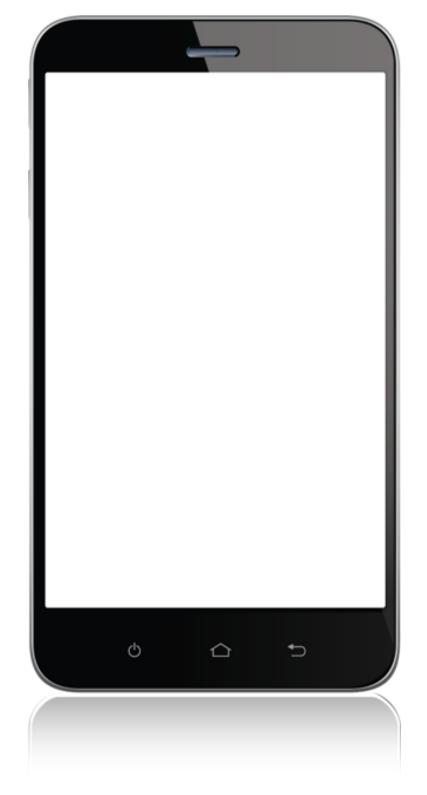


Viya applicat ions, persona s-data scientis



5 ETL Demo







LINKS

Loading and joining tables in cas



Thank You

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LinkedIn Group https://www.linkedin.com/groups/5095978

