

Session Recap

Session Topic: SAS® Visual Analytics Designer
Session Date: 06OCT2014
Recording: <http://support.sas.com/training/us/lw/lwrecord.hsql?date=06Oct14&cocode=19884>

This session recap includes the Q&A from the session. Additional information and links to more detailed content are included.

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SAS Visual Analytics Toolkit



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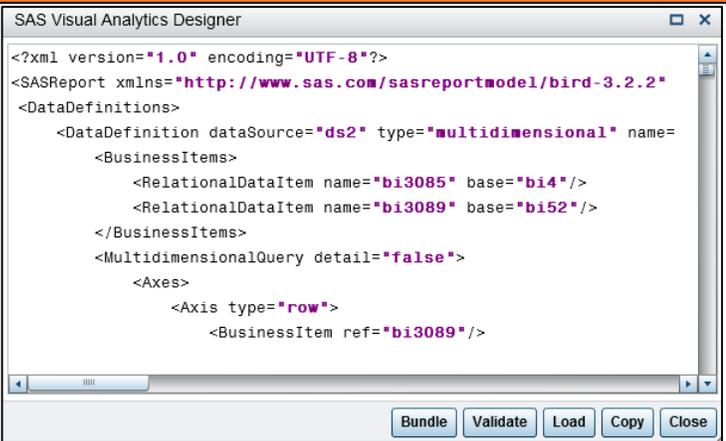
Question:	<i>So what's the difference between the Explorer and the Designer? Why are there two tools?</i>	
Answer:	The Explorer helps you learn about your data by visualizing it in different ways. The Designer enables you to present your findings in a report that you can view and interact with from several types of clients.	
Additional Information:	Clients for viewing reports include the SAS Visual Analytics Viewer and the SAS Mobile BI app for iPad and Android tablets. You can also view your reports using other SAS applications such as SAS Enterprise Guide and the SAS Add-In for Microsoft Office.	
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Overview of SAS Visual Analytics Explorer • User's Guide: Overview of SAS Visual Analytics Designer 	 Videos <ul style="list-style-type: none"> • Exploration Basics • Report Basics 	 Technical Papers <ul style="list-style-type: none"> • The Forest and the Trees: See it All with SAS Visual Analytics Explorer • Getting the Most Out of SAS Visual Analytics: Design Tips for Creating More Stunning Reports • Discussion: Explaining SAS Visual Analytics to Colleagues

Question:	<i>I am trying to determine the amount of first year sales for products that have been released in different months/years. I have the Product Introduction Date, Date of Sale, and Sales Amount available in my data. Is there a way in Visual Analytics to filter the sales/dates to include only 12 months after the first (minimum) Sales Date?</i>	
Answer:	<p>An easy way of doing this is to create a new column (call it Date Difference) by subtracting the Release Date from the Date of Sale. However, you can't just add date fields to an x-y expression. What you need to do is to use the TreatAs operator to have the LASR Server treat the Date field as Numeric. Then apply a filter to your table to keep only rows where your Date Difference is less than or equal to 365.</p> <div style="border: 1px solid gray; padding: 5px; width: fit-content; margin: 10px auto;"> $\left(\text{TreatAs} \left[\begin{array}{c} _ _ _ _ _ \\ _ _ _ _ _ \end{array} \right] - \text{TreatAs} \left[\begin{array}{c} _ _ _ _ _ \\ _ _ _ _ _ \end{array} \right] \right)$ <p style="font-size: small; margin: 0;">Date Order was Del... Date Order was pla...</p> </div>	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Creating Calculated Data Items • User's Guide: Numeric (Advanced) Operators • User's Guide: Date and Time Operators 	 Videos <ul style="list-style-type: none"> • Create Calculated Data Items 	 Technical Papers <ul style="list-style-type: none"> • Discussion: Finding number of days between to dates in SAS Visual Analytics • Discussion: Date & Week Numbers in SAS Visual Analytics

Question:	<i>What are sparklines in a report table? How do they work?</i>	
Answer:	<p>Sparklines are small line graphs that present a single line of data over time, shown on a list table. A sparkline is about the size of one or two words in the table and is great to understand trends in the data points by just looking at the corresponding fields and columns. It would be a great start for your further analysis after you see a trend occurring. To add a sparkline, position the cursor over your list table and right-click. On the menu, select Add sparkline. In the pop-up panel provided, you need to select a time field and a measure to display. Also, you can type in a column heading and set a baseline value.</p>	<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <div style="text-align: right; border-bottom: 1px solid gray; padding-bottom: 5px;">Add Sparkline ✕</div> <p>Column label: <input style="width: 100%;" type="text"/></p> <p>Time Axis: 📅 Facility Opening Date ▼</p> <p>Measure (line): 📏 Customer Distance ▼</p> <p><input type="checkbox"/> Set baseline</p> <p>Value: <input style="width: 100%;" type="text"/></p> <p>Fill type: Gradient ▼</p> <div style="text-align: right; padding-top: 5px;"> OK Cancel </div> </div>
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Using Tables to Display Results 	 Videos <ul style="list-style-type: none"> • Create a List Table 	 Technical Papers <ul style="list-style-type: none"> • Discussion: What is a table with sparklines

Question:	<i>When I use a List control, a Button Bar control, and a Drop-down List control, a frequency count is added to the panel beside each value. Can I remove this?</i>	
Answer:	The count appears because the Frequency measure is automatically added to the Frequency role for each of these controls. To remove the counts, you remove the Frequency measure from the Frequency role on the Roles tab on the right side of the Report Designer.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Controls • User's Guide: Using Controls to Display Results 	 Videos <ul style="list-style-type: none"> • Create a control report object 	 Technical Papers

Question:	<i>I've heard something about being able to set alerts in my reports. How do they work?</i>	
Answer:	SAS Visual Analytics can be configured to send a notification to specific users when report objects contain data that meets certain criteria. In addition to specifying the criteria for the alert, you can also specify how frequently the system checks to see whether alert criteria have been met, and how frequently a notification is sent to a user or group of users.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Working with Alerts for Report Objects • User's Guide: Subscribe and Unsubscribe to Alerts 	 Videos <ul style="list-style-type: none"> • Create an alert based on an expression 	 Technical Papers <ul style="list-style-type: none"> • Discussion: Display Rules and Alerts

Question:	<i>How can you get the report XML ?</i>	
Answer:	<p>A Visual Analytics Designer report is stored in an XML format. There are a couple of ways that you can access the report XML from Visual Analytics Designer. Probably the easiest way would be to hold down the Ctrl key and press Alt and B while in the Designer window of the Viewer.</p>	 <pre> SAS Visual Analytics Designer <?xml version="1.0" encoding="UTF-8"?> <SASReport xmlns="http://www.sas.com/sasreportmodel/bird-3.2.2" <DataDefinitions> <DataDefinition dataSource="ds2" type="multidimensional" name= <BusinessItems> <RelationalDataItem name="b13085" base="b14"/> <RelationalDataItem name="b13089" base="b152"/> </BusinessItems> <MultidimensionalQuery detail="false"> <Axes> <Axis type="row"> <BusinessItem ref="b13089"/> </Axis> </Axes> </MultidimensionalQuery> </DataDefinition> </DataDefinitions> </pre>
Additional Information:		
 Online Documentation	 Videos	 Technical Papers

Question:	<i>In a crosstab, how can I show percent of ColumnTotal or RowTotal instead of TableTotal?</i>	
Answer:	There currently isn't a way to create a Percent of Column Total or Percent of Row Total in a crosstab. On the Data tab, you can right-click a measure and select Create ⇨ Percent of Total to create a new column. You can add this to the crosstab, but it won't be a Column or Row total field.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Creating Derived Items 	 Videos <ul style="list-style-type: none"> • Create aggregated measures in Designer 	 Technical Papers

Question:	<i>Can I view my reports in Excel?</i>	
Answer:	If you have the SAS Add-In for Microsoft Excel, you can view your SAS Visual Analytics reports in Excel, Word, PowerPoint, and even Outlook.	
Additional Information:	SAS Enterprise Guide also enables you to view your SAS Visual Analytics reports.	
 Online Documentation <ul style="list-style-type: none"> • SAS Add-In for Microsoft Office Help: Working with Reports • SAS Enterprise Guide Help: Working with Results: Working with Reports 	 Videos <ul style="list-style-type: none"> • Integrating SAS Office Analytics with SAS Visual Analytics 	 Technical Papers <ul style="list-style-type: none"> • Share Your SAS Visual Analytics Reports with SAS Office Analytics • Everyday Visual Analytics

Question:	<i>I've got a report saved in the My Folder location. A colleague and I will both need to work on the report – how can I give him access to the My Folder location I use?</i>	
Answer:	Your My Folder location is created as a secure place that only you can access. By design, you won't be able to give your colleague to have access to your My Folder location. Instead, move or copy the report to a SAS Folder that you can both access. If there isn't an already created folder that you can both access, contact your SAS administrator to request one.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • System Administration Guide: Working with SAS Folders 	 Videos	 Technical Papers <ul style="list-style-type: none"> • SAS Visual Analytics: Managing User Permissions

Question:	<i>What is involved in configuring Visual Analytics to work with SAS Enterprise Guide or the SAS Add-In for Microsoft Office? Is there any documentation that you could point to?</i>	
Answer:	Setting up your Visual Analytics reports to be viewable in SAS Enterprise Guide and SAS Add-In for Microsoft Office is something that your Administrator will need to do. But briefly, in addition to SAS Visual Analytics, you must have some form of the SAS Business Intelligence Suite, including the SAS add-in, SAS Enterprise Guide, and SAS Management Console, licensed and installed in your system. Then your Administrator would set the connections and permissions up to enable Enterprise Guide and Microsoft products (Word, Excel, PowerPoint) to access the reports.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • 	 Videos <ul style="list-style-type: none"> • Integrating SAS Office Analytics with SAS Visual Analytics 	 Technical Papers <ul style="list-style-type: none"> • Share Your SAS Visual Analytics Reports with SAS Office Analytics

Question:	<i>I've got a report already created for my product sales data and it's working great. Now I've got to create almost the same report but using supplier cost data. Is there any way I can reuse my existing report with this different data table?</i>	
Answer:	<p>There are several ways to reuse the existing report:</p> <ul style="list-style-type: none"> You can make a copy of the first report and then change the data source to the supplier cost data. You would change the data source by using the Change Data Source selection from the Options menu on the Data tab. Data items that are not in the new data source will be removed from any report objects, so this method works best if the data items have the same name in the new table. You can import report objects from the original report into a new report that uses the new data source. That way you can select just some of report objects from the original report and not have to use them all. You'll still have to fix any imported report object that uses a data item that is not in the new data source. 	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> User's Guide: Working with Data Sources in Reports User's Guide: Base a New Report on Report Objects Imported from One or More Existing Reports 	 Videos <ul style="list-style-type: none"> Create a Multi-Section Report and Import Report Objects 	 Technical Papers

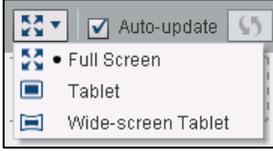
Question:	<i>I want to filter all of my report objects the same way, including those in another section. What's the best way to do this?</i>	
Answer:	<p>The easiest way to apply a filter to an entire report is to use the Data Source filter. This filter can be found in a different place than usual. Typically, the user will apply filters on the right side of the Designer window in the Filters tab. But the Data Source filter can be found in the Data tab on the left side of the window. Select the Options button and then New Data Source Filter. This enables you to define an expression to set up a filter on any of your data sources using data items, column templates, and operators.</p>	
Additional Information:	<p>An added benefit of using a Data Source filter is that the Data Source filter updates the cardinality values that appear on the Data tab.</p>	
 Online Documentation <ul style="list-style-type: none"> User's Guide: Working with Data Source Filters in a Report User's Guide: About Report Filters 	 Videos <ul style="list-style-type: none"> Report Basics 	 Technical Papers

Question:	<i>The report is constantly updating when building a report, which means that every time I make a change to the report, the view can be slightly or significantly different. Can I build a report without having it update constantly?</i>	
Answer:	<p>There is an auto-update feature in Visual Analytics that is set. To change this, use the Auto-Update check box at the top right side of the Workspace. Uncheck that and you should be able to make changes and not have the objects change until you want them to.</p>	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> User's Guide: Control Data Visualization Data Updates 	 Videos	 Technical Papers

Question:	<i>I have a pie chart, bar chart, and treemap that all show the same values such as country. How can I make the countries the same color in all of the graphs and have it automatically apply to new graphs in the same report?</i>	
Answer:	You can accomplish this by creating a report-level display rule. Click the Display Rules tab in the Right pane, select the report from the drop-down list at the top of the tab, and click New to create a new display rule. Add each country value to the rule and set the desired color.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Add Report-Level Display Rules • User's Guide: Overview of Display Rules 	 Videos <ul style="list-style-type: none"> • Create Display Rules 	 Technical Papers <ul style="list-style-type: none"> • Usage Note: Support for display rules on specific report objects in SAS Visual Analytics Designer

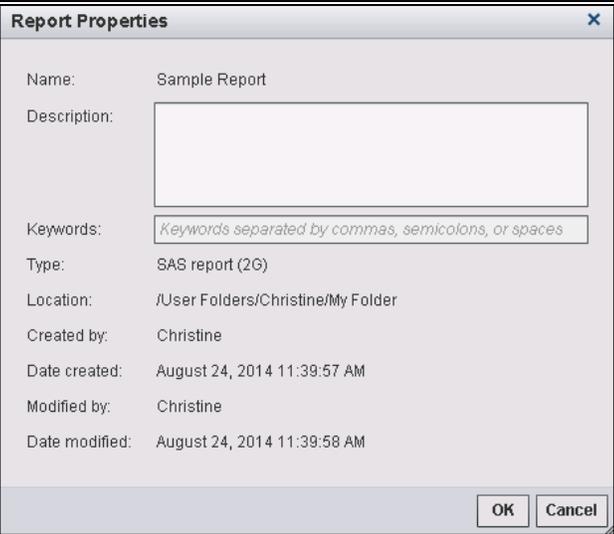
Question:	<i>Printing is listed as "pre-production." What does that mean?</i>	
Answer:	Printing in the Designer has not been fully implemented in the 6.4 release. Pre-production features provide limited functionality that might change in a future release.	
Additional Information:		
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Print a Report 	 Videos	 Technical Papers

Question:	<i>Where do I find documentation of keyboard shortcuts such as holding down the Ctrl key and then pressing Alt+B?</i>	
Answer:	The keyboard shortcuts are not currently documented. These shortcuts are typically used for troubleshooting and should be used only at the direction of SAS Technical Support.	
Additional Information:		
 Online Documentation	 Videos	 Technical Papers

Question:	<i>Why would I want to use the full-screen report view instead of the tablet report view?</i>	
Answer:	Designing a report in Visual Analytics Designer should be done with the end user in mind. These different views will alter the canvas to dimensions that are intended for consumption on the web using Visual Analytics Viewer (full screen) or using a tablet device (tablet or wide-screen tablet). If most of your users will be consuming the reports via Visual Analytics Viewer, consider using the full-screen layout. If most of your users will be consuming the reports via a tablet device, consider using one of the tablet layouts.	
Additional Information:	<p>You can change the report view for the current report by selecting Report View from the View menu or by using the Aspect ratio button in the upper right corner of the report workspace.</p> <p>You can also use the Preferences window to set the report view that you want to use as the default for new reports.</p>	
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Choose a Report View • User's Guide: Specifying Your Preferences for the Designer 	 Videos	 Technical Papers

Question:	<i>Can you describe how comments work?</i>	
Answer:	Sure, comments are a great way to add information to a report as well as to collaborate with your colleagues. You can add and interact with report comments in the Designer and from the Object Inspector on the Home page. When using the SAS Visual Analytics Viewer or the Mobile BI app, you can create, view, and interact with report comments, and you can also create, view, and interact with report object comments. You can add new comments, reply to existing comments, and even attach files to your comments. Report object comments cannot be added, changed, or viewed using the Designer or the Object Inspector on the Home page.	
Additional Information:	You can define an administrator for the comment facility. The administrator will be able to delete comments and attachments.	
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Add Comments to a Report • User's Guide: Add Comments to Objects on the Home Page • User's Guide: Add Comments to a Report in the Viewer 	 Videos <ul style="list-style-type: none"> • Export the Data Used in Report Objects and Collaborate Using Comments • Get Started with the SAS Visual Analytics Home Page 	 Technical Papers <ul style="list-style-type: none"> • Discussion: SAS Visual Analytics and comments limitations

Question:	<i>Is there any way to set default values in the controls, such as the range slider?</i>	
Answer:	There is currently no way to define a default value for these objects. However, if you create a report with a particular value for these objects, this will be remembered when the report is opened for editing.	
Additional Information:		
 Online Documentation	 Videos	 Technical Papers

Question:	<i>I see description and keyword fields when I look at the report on the Home page, but it always says "(not available)". How can I set these values?</i>		
Answer:	<p>When you save a report, you select the SAS Folders location and enter a report name. You can add a description and keywords by selecting File ⇒ Report Properties in the Designer.</p>		
Additional Information:	<p>You can also customize the Open window to show additional fields such as Description and Keywords. Right-click the column headings on the right side of the Open window and select Customize. Choose the fields that you want to display and click OK.</p>		
			
	 <p>Online Documentation</p> <ul style="list-style-type: none"> • User's Guide: View Report Properties 	 <p>Videos</p>	 <p>Technical Papers</p>

Question:	<i>Is there a way to create specialized graphs for use in the reports?</i>		
Answer:	<p>Yes. You can use the custom graph interface to create custom graphs. This is available by clicking the down button beside the Home page icon and selecting Build Custom Graph.</p>		
Additional Information:			
	 <p>Online Documentation</p> <ul style="list-style-type: none"> • User's Guide: About the Graph Builder 	 <p>Videos</p> <ul style="list-style-type: none"> • Create a Custom Graph with the Graph Builder 	 <p>Technical Papers</p>

Question:	<i>What are hierarchies and why would you use them?</i>		
Answer:	<p>Hierarchies are an arrangement of related objects into levels that are based on parent-child relationships. For example, a geographic hierarchy might be defined as Country > Region > State. Hierarchies can be defined in a Crosstab object. Hierarchies are useful in that they enable the dynamic navigation of data by expanding or drilling into certain areas of your data.</p>		
Additional Information:			
	 <p>Online Documentation</p> <ul style="list-style-type: none"> • User's Guide: Working with Hierarchies in a Report • User's Guide: Derive a Hierarchy from a Date, Time, or Datetime Data Item 	 <p>Videos</p> <ul style="list-style-type: none"> • Create and Manage Hierarchies 	 <p>Technical Papers</p>

Question:	<i>Can you show how to link between sections of a report?</i>	
Answer:	You can define links by right-clicking a report object and specifying Add Link . You can specify to link to a different report, a different section in the same report (provided there are multiple sections), or to an external link.	
Additional Information:	If linking to another object, Visual Analytics will pass a parameter based on the cell or graphical item that you click to the child section. This parameter will act as a filter for the child section, provided the data contains the same data item.	
 Online Documentation <ul style="list-style-type: none"> • User's Guide: Overview of Linking • User's Guide: Creating Links 	 Videos <ul style="list-style-type: none"> • Use Interactions and Links in a Report 	 Technical Papers <ul style="list-style-type: none"> • Discussion: Report Link with Parameter • Discussion: Linking between Sections without Filters

If you have any questions, please contact:

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