SASVIYA Exercise 06

Filtering Data in a Visual

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**Sources**

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# Use Case

Razorback Stores is a local department store serving a metropolitan area. As a department store, they offer a wide variety of items and services and track sales through a point of sale system. Over the past several months, Razorback Stores performed a marketing campaign designed to promote and incentivize a loyalty program.

For this exercise, Razorback Stores would like to know what the net sales are for only their promotional customers. They are hoping to do this using filtering.

## Step 0: Getting Started

Following the guide of importing data and import your chosen dataset. See **Viya 02 – Importing data** for specific steps.

## Step 1: Navigation

Once your data is imported, you will be presented with the working report screen. The screen is broken out into three key areas:

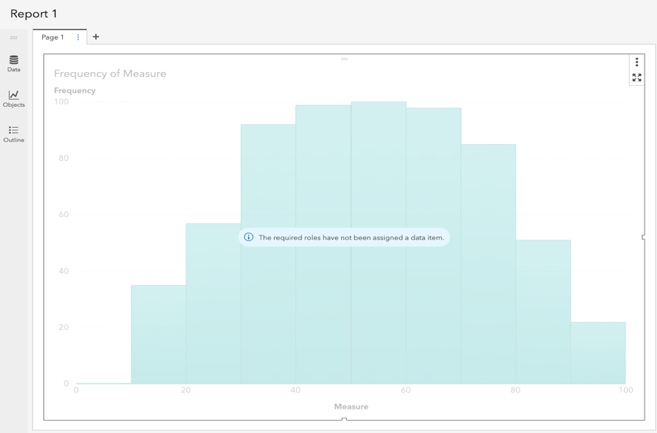
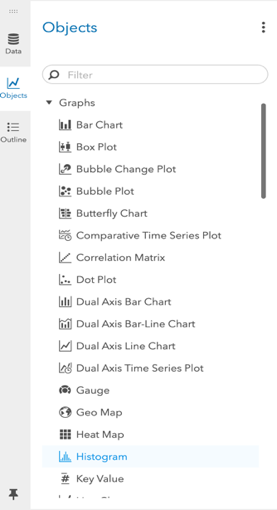
* Left pane (Red) – This is where you can manipulate your data elements, choose objects to work with, and see an outline of the work you are creating.
* Middle pane (Blue) – This is the workspace. This is where you drag objects to and begin to build your visualizations and models
* Right pane (Green) – this is where you set various roles (for data mining) and manipulate and enhance chart features (options). You can also filter pieces of data as well.

A screenshot of a cell phone

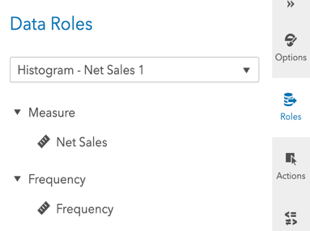
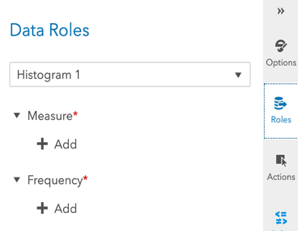
Description automatically generated

## Step 2: Create Histogram

Under the **Objects** panel on the left-hand side, you can select **Histogram** located under the **Graphs** area of the objects. Click and drag **Histogram** to your workspace in the middle. Your screen will look like the following:



Once the histogram is in the workspace, you can set a role of net sales for this use case by selecting roles and then net sales as the measure. The chart will update automatically with the data:



Now your screen should look like the following:

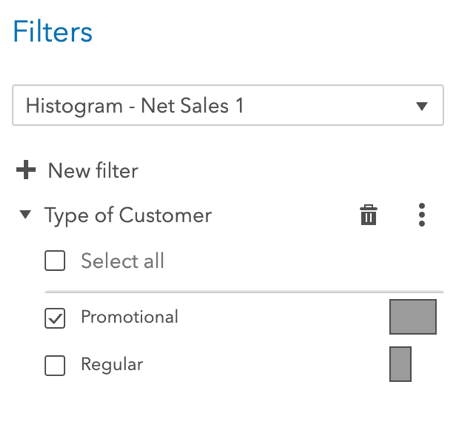
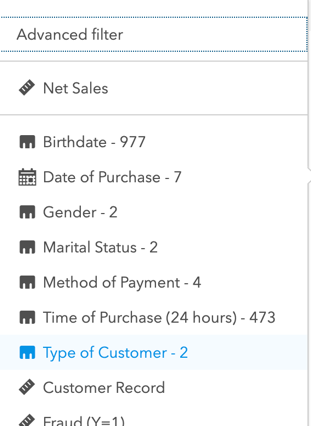
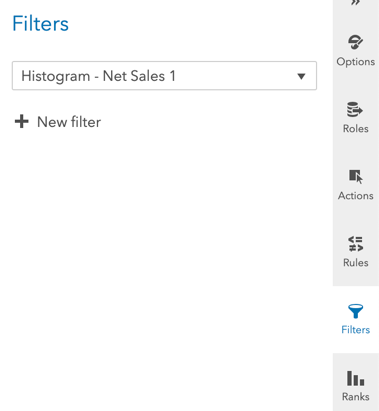
A screenshot of a video game

Description automatically generated

## Step 3: Select and Create Filter

Now that we have a visualization of all net sales, we need to place a filter to show only the net sales from promotional customers. To do this, ensure that you have the graph selected.

1. Choose **Filters** on the right-hand bar
2. Click **+ New filter.**
3. On the drop-down menu, select **Type of Customer.**
4. Uncheck the **Regular** type of customer box.



## Step 5: Promotional Customer Histogram

We now have a filter in place! That provides a visual on the # of Promotional Customers.

A close up of text on a white background

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