

# MODUL 8

## SELF-SERVICE DATA PREPARATION IN SAS® VIYA®

### Introduction to SAS Data Studio and Plans

#### THEME DESCRIPTION

Students are able to do transform data into the form required for analytics, in accordance with the SAS Data Preparation methodology address transforming the data: Prepare and Cleanse. In order to standardize your data to ensure consistency, parse data, or group data to create one best record for Analytics.

#### WEEKLY LEARNING OUTCOMES (SUB-LESSONS)

CLO-3-Sub-CLO-8, Able to effectively implement the process and role of data curation in data management through the use of SAS® Viya cloud technology– C6.

Through the following learning steps:

1. SAS Data Explorer: Explore and load the CLIENT\_INFO table
2. SAS Data Studio: Using Suggestions to Prepare Data
3. Add and configure the Remove duplicates suggestion
4. Add the Parsing CUSTOMER\_NAME suggestion
5. SAS Drive: Saved Plan overview

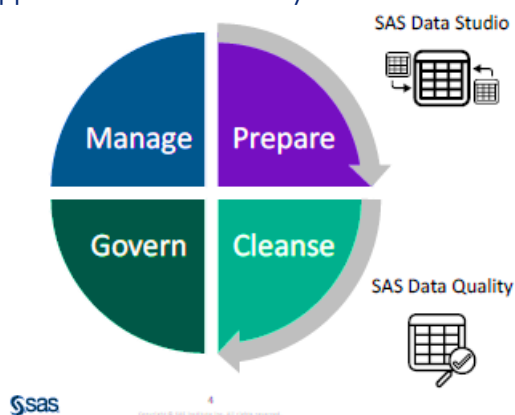
#### PRACTICUM SUPPORT

- c. Windows Operating System
- d. (any) Browser Application

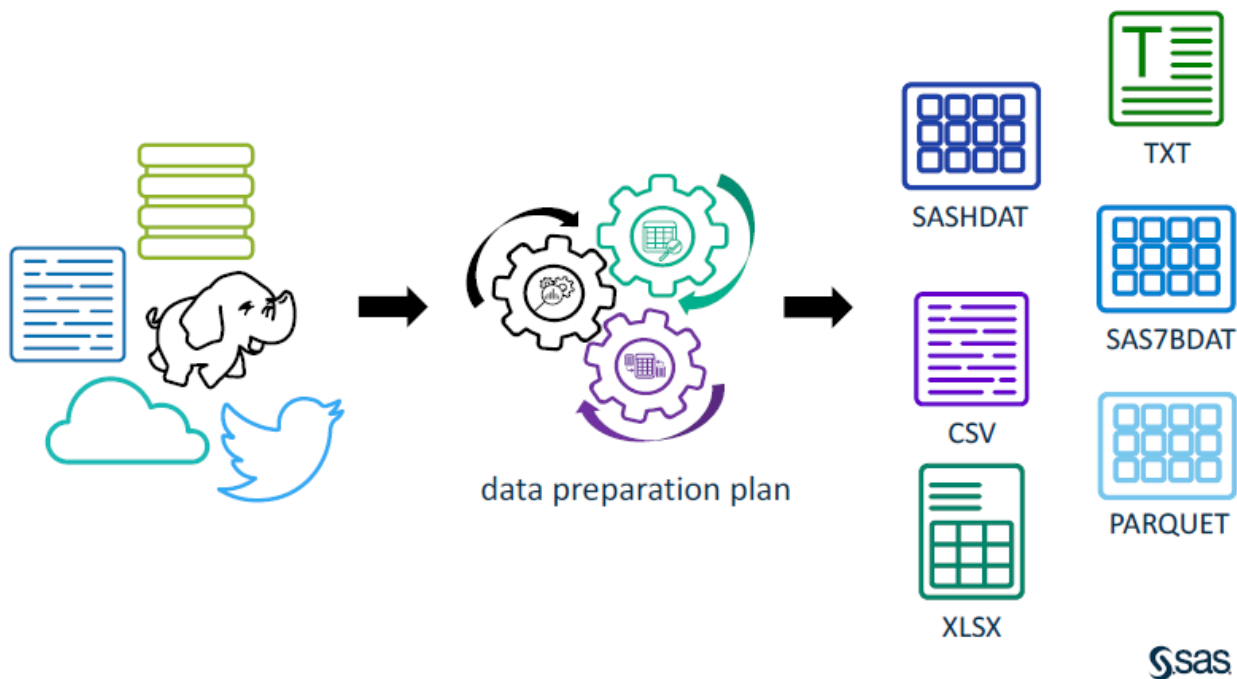
#### PRACTICUM GUIDELINES

##### Exploring the SAS Data Preparation Applications

- ▶ Our IS-429 BDA practicum class today illustrates exploring the SAS Self-Service Data Preparation applications in the SAS Viya environment.



- ▶ The activities, and practice are about investigating the environment and SAS Data Preparation applications:
  - ◆ SAS Drive
  - ◆ SAS Data Explorer
  - ◆ SAS Data Studio
  - ◆ SAS Data Quality
- ▶ A **data preparation plan** is a collection of transforms that are performed on one or more tables that prepare data for analysis and reporting.



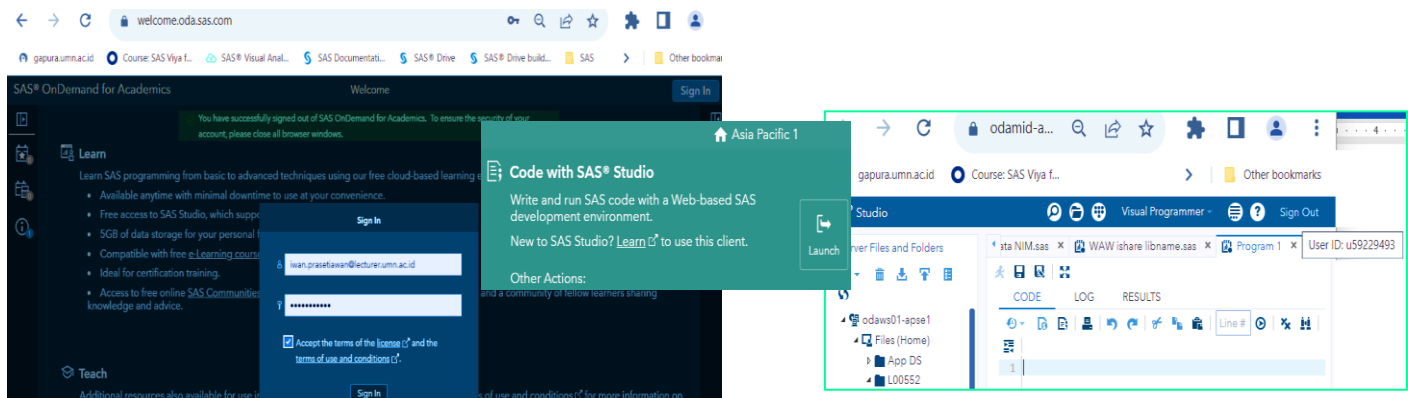
Copyright © SAS Institute Inc. All rights reserved.

- You create plans in **SAS Data Studio**, and you can save them to a SAS folder location where other users can also access them.

## PRACTICUM STEPS

### Login to SAS Studio

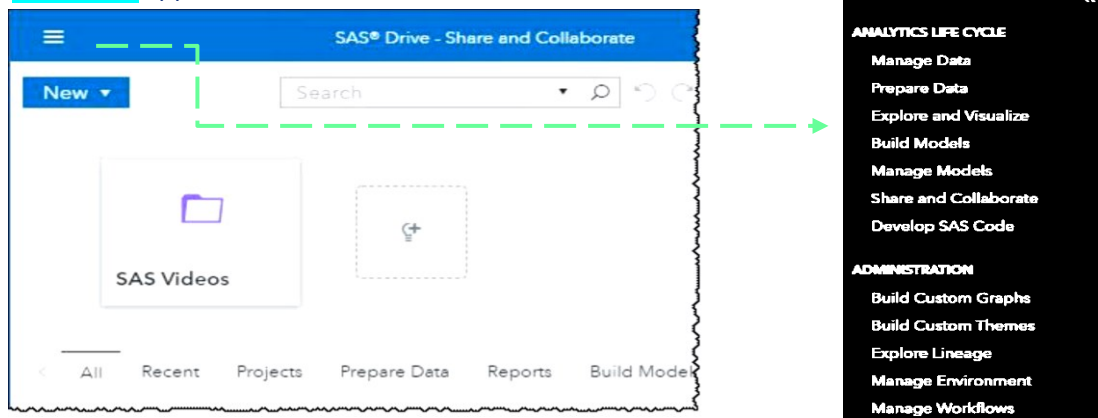
Start, <https://welcome.oda.sas.com>




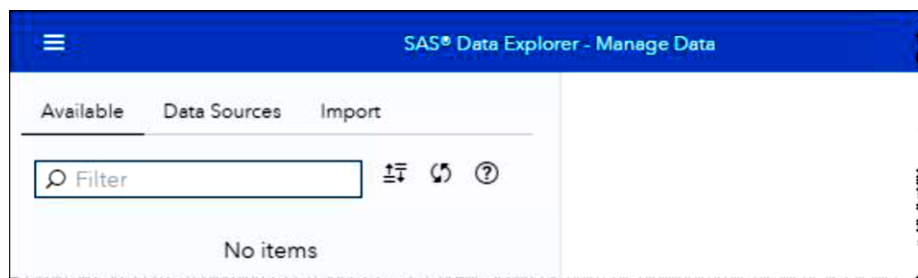
### Open SAS Drive Explorer

- 1) When you have signed in to SAS OnDemand for Academics, then open the SAS Studio application and open another tab of your browser and click [SAS® Drive](#) to go to SAS Drive page.
  - If you have problems, you can try using this url: <https://v4e041.vfe.sas.com/SASDrive/> or go to <https://vle.sas.com/course/view.php?id=7715> then click "Launch SAS Viya for Learners3.5".

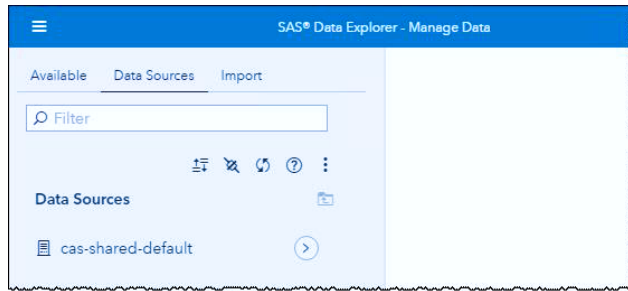
2) **SAS Drive** appears.



- ▶ With SAS Drive, you can manage all your content in one convenient location.
  - ▶ You can search for an object that was created in a SAS application. You can share, tag, and preview your SAS content. Sharing takes only one click on the object.
  - ▶ You decide who you want to share it with and whether they can read, edit, or share it.
  - ▶ Tagging content can help you organize your work. Previewing files can help you find the right one.
  - ▶ In addition to controlling your SAS content, you can drag-and-drop most content types from your local machine, and SAS Drive will upload it for you.
  - ▶ For quick access to what you care most about, SAS Drive includes a collapsible area where you can place any content you choose. This paper includes screen shots and illustrative examples showing you how to manage all your SAS content in one place
- 3) Click  (Show list of applications) to access SAS Viya applications.
  - 4) The applications that are shown are controlled by the SAS products that are licensed and the permissions assigned to the user.
  - 5) The list of actions in the list relate to a specific application that will be used to perform that action. For example, **selecting Manage Data opens SAS Data Explorer** to enable you to work with **data connections and data**.
  - 6) Select **Manage Data** to open **SAS Data Explorer**.  
**SAS Data Explorer** appears

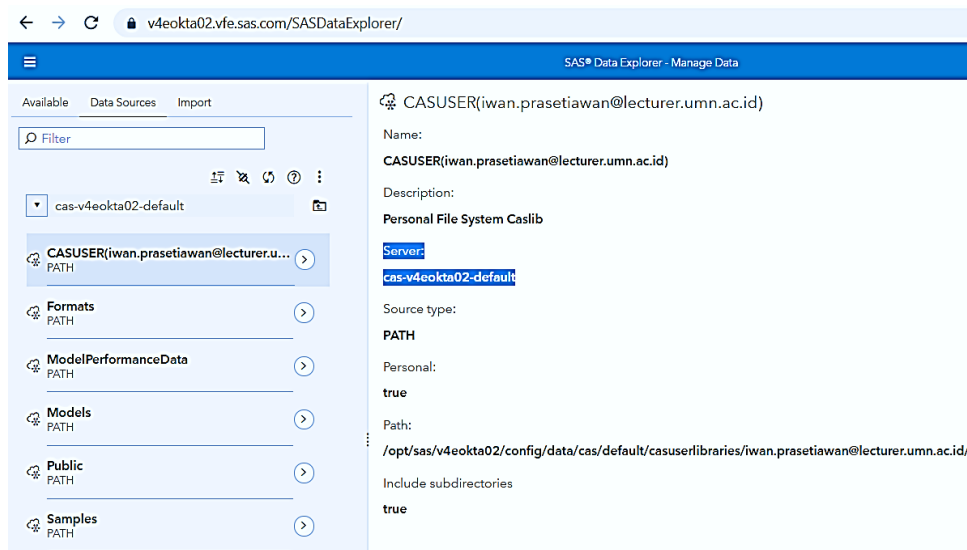


1. **Explore and load the CLIENT\_INFO table.**
  - a. Click the Data Sources tab

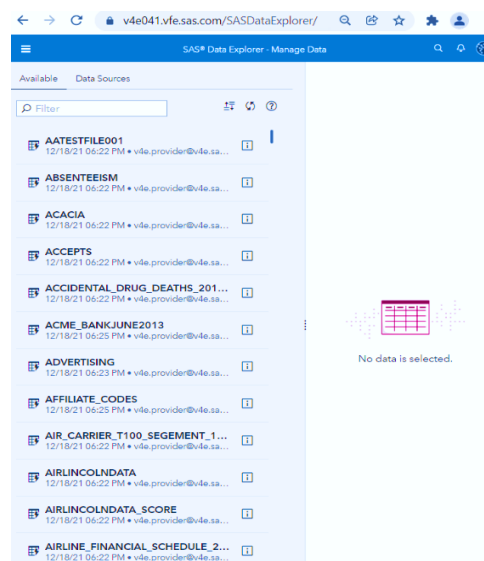


- b. Only one CAS server is configured. Click (Down one level) for the **cas-shared-default** server entry to view the list of data sources that are configured on the **CAS server**.

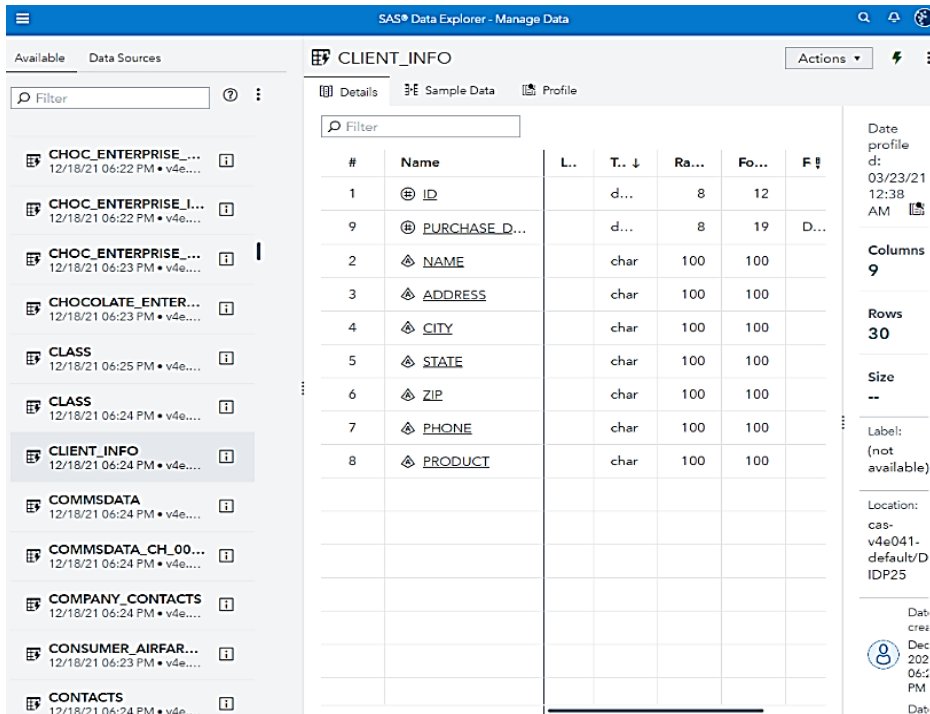
**Note:** By default, users have their own CASUSER library and the Formats, Public, and Samples caslibs. Additional caslibs might be visible, depending on the SAS products that are licensed.



- c. Double-click Public to open the connection and view the data sources. Click CLIENT\_INFO.sashdat to view specifics of the table.
- If you don't find the CLIENT\_INFO table in Data Sources then move to Available tab.
- d. Click the Available tab.



- The Available tab enables you to see all tables that have been loaded into memory from any CAS server to which you have access. Clicked twice the CLIENT\_INFO table to selected.



**CLIENT\_INFO**

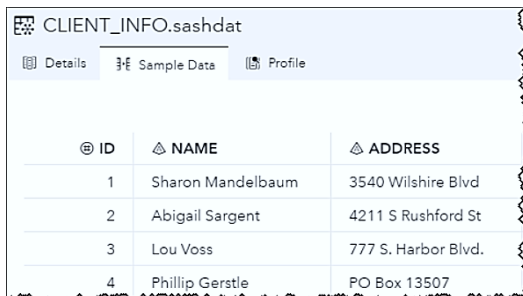
#	Name	L...	T... ↓	Ra...	Fo...	F...
1	ID		d...	8	12	
9	PURCHASE D...		d...	8	19	D...
2	NAME		char	100	100	
3	ADDRESS		char	100	100	
4	CITY		char	100	100	
5	STATE		char	100	100	
6	ZIP		char	100	100	
7	PHONE		char	100	100	
8	PRODUCT		char	100	100	

**Metadata Summary:**

- Date profile: 03/23/21 12:38 AM
- Columns: 9
- Rows: 30
- Size: --
- Label: (not available)
- Location: cas-v4e041-default/D IDP25
- Database: Dec 202 06: PM

The Details tab shows metadata information about the table such as the column properties, table size, and number of columns.

- Click the Sample Data tab.



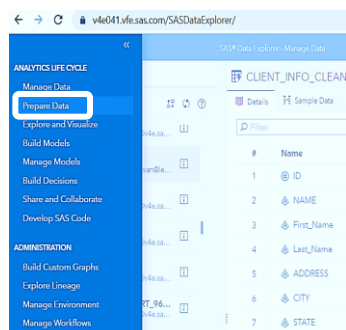
ID	NAME	ADDRESS
1	Sharon Mandelbaum	3540 Wilshire Blvd
2	Abigail Sargent	4211 S Rushford St
3	Lou Voss	777 S. Harbor Blvd.
4	Phillip Gerstle	PO Box 13507

- A sample data is shown displayed completely for 100 records data sample.
- Screenshot your page of the Client\_Info sample data as in the output figure A.**

## 2. Using Suggestions to Prepare Data.

- This demonstration creates a simple plan using the Suggestions feature to quickly add and configure Data Quality transforms.

- Clicking "prepare data" will take you to the **SAS Data Studio** tools for further data preparation activities.



**ANALYTICS LIFE CYCLE**


- Manage Data
- Prepare Data**
- Explore and Visualize
- Build Models
- Manage Models
- Build Decisions
- Share and Collaborate
- Develop SAS Code

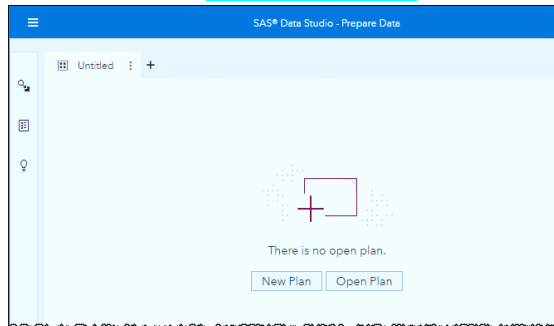
**ADMINISTRATION**

- Build Custom Graphs
- Explore Lineage
- Manage Environment
- Manage Workflows

**CLIENT\_INFO\_CLEAN**

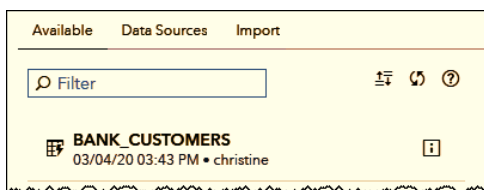
#	Name
1	ID
2	NAME
3	First_Name
4	Last_Name
5	ADDRESS
6	CITY
7	STATE

- b. Click  (Show list of applications) and select Prepare Data to open **SAS Data Studio**.
- h. Click New Plan. **SAS Data Studio** appears



The Choose Data window appears.

- c. Select the **BANK\_CUSTOMERS** table as the data source. Click the Data Sources tab.
- d. Click (Down one level) for the cas-shared-default server.
- e. Click (Down one level) for the DIDP25 caslib.
- f. Right-click BANK\_CUSTOMERS.sashdat and select Load to load the table into memory.
  - ▶ Ignore it, if the table is already available in CAS memory.
  - ▶ This step shows what if you prepare a table for loading into CAS memory and will be available at available tab.
- g. Click the Available tab. The BANK\_CUSTOMERS table is displayed as an in-memory table.

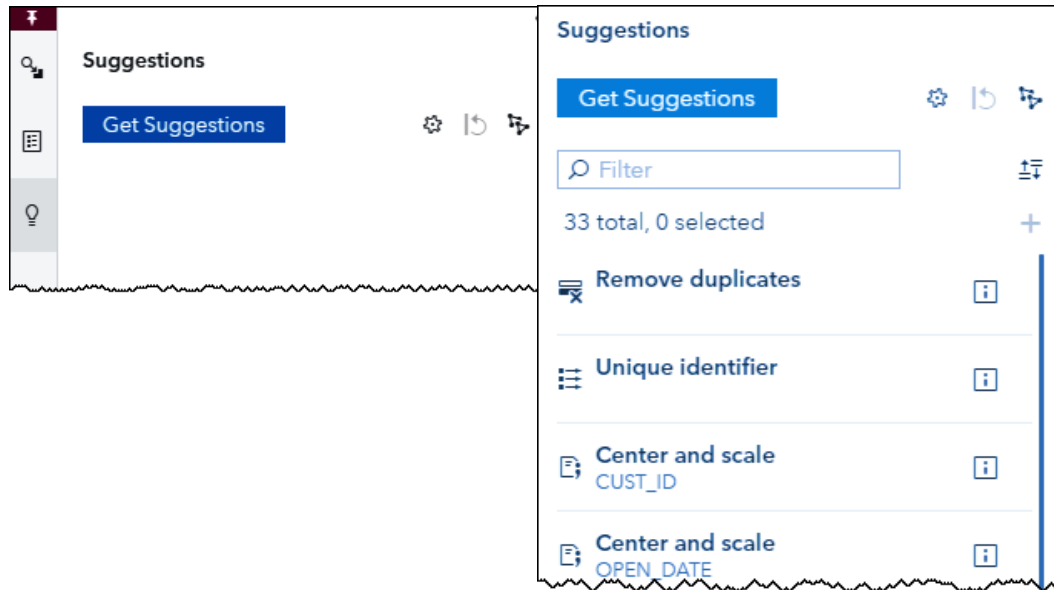


- h. Double click the BANK\_CUSTOMERS table. You have them now at your SAS Studio workspace.
- i. Scroll to the right and expand the CUSTOMER\_NAME, ADDRESS, CITY, and STATE columns to review the data.

Table Profile Metadata				
BANK_CUSTOMERS				
CUSTOMER_NAME	ADDRESS	CITY	COUNTY	STATE
Stephen seitors	814 Blue Mound rOAD	fort WORTH	Tarrant	TX
Doug mAtresciano	12500 Ne 10th Pl	Bellevue	King	waSHINGTON
bridget Knightly	66 Flint sTreet	Asheville	Buncombe	NC
Kennith Kirklin	2303 21st Ave S	nashville	Davidson	TeNNeSSee
James Mitchell	8253 Ronson Rd	pasadena		CA
kathleen Beresnyak	100 W 25th Avenue	San Mateo	San Mateo	CA

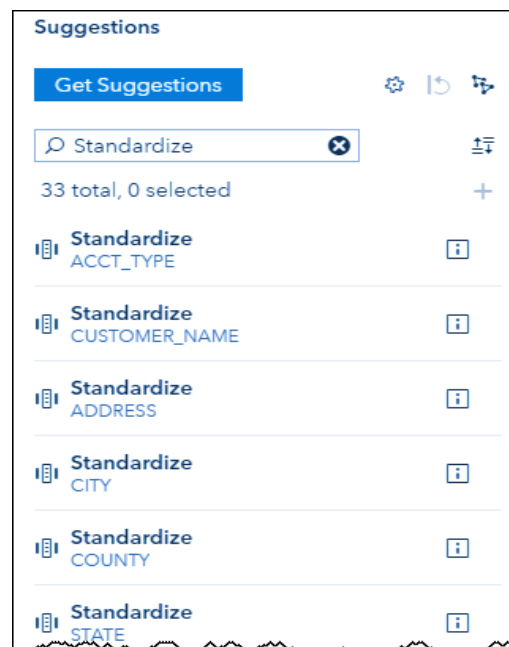
**Note:** The data in the *CUSTOMER\_NAME*, *ADDRESS*, *CITY*, and *STATE* columns is **mixed case** and **not in a standard format**.

- j. Click  (Suggestions) in the left-hand pane. Click Get Suggestions.



The system has provided some of 32 suggestions for the selected table for you to use.

- k. **Standardize the Column.** Enter "Standardize: in the Filter box.
- ▶ **Twelve standardizations are suggested** for this table. These columns have standardization suggestions because they were the right type of data, character, and they seemed like they contained data that corresponds to one of our standardization algorithms.
  - ▶ Sometimes the suggestions make a mistake. For example, ACCT\_TYPE is probably unique to this bank data and cannot be standardized by one of our default standardization algorithms. It might look enough like a phone number or address that the sort of data in the column was misclassified. However, most of the suggestions are correct. Name, Address, City, County, and State can be standardized.
  - ▶ Standardization put every value in the column in a consistent format. For example, it applies consistent casing, abbreviations, and ordering to address values.



- l. Double-click the **Standardize CUSTOMER\_NAME** suggestion to add it to the data preparation plan.

1. Standardize

Source column:

Locale:

Definition:

CUSTOMER\_...

English (United States)

Name

☒ Replace source column
 ☐ Create new column

- m. The Standardize transform is added to the plan.

- ▶ Verify that the **CUSTOMER\_NAME** column is selected as the source column.
- ▶ Verify that the selected locale is **English (United States)**.
- ▶ Verify that the selected definition is **Name**

The suggestion gives us default settings, but we can change them.

- n. Click **Replace source** column

- o. This is the first transform in the plan. Transforms can be deleted from anywhere in the plan or moved forward or backward in the processing order.

>>

Plan

▶

🔄

📄

⋮

Name:

Plan 1

Modified:

01/28/20 01:44 PM

📄

📄

↑

↓

🗑️

1. Standardize

- p. The **session table is an in-memory table**. Right now, it reflects the source table BANK\_CUSTOMERS. It is not current to the plan because we have not run the plan yet. When we run the plan, the session table is updated to reflect the transforms used. Click Run.

BANK\_CUSTOMERS

🔄

The session table is not current to the plan. Run the plan to update the table.

1. Standardize

Run

Source column:

Locale:

Definition:

CUSTOMER\_...

English (United States)

Name

☒ Replace source column
 ☐ Create new column



Partial List of the Original Data

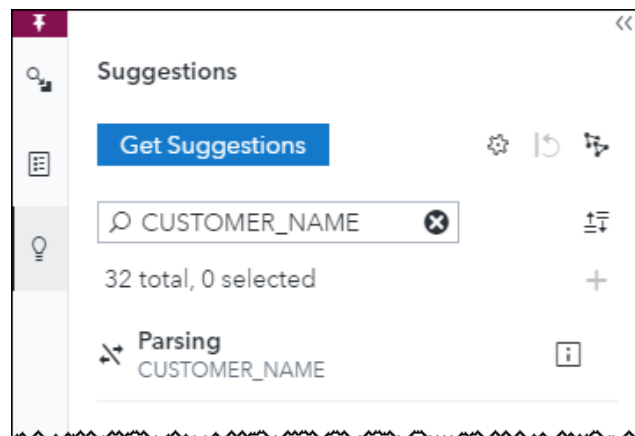
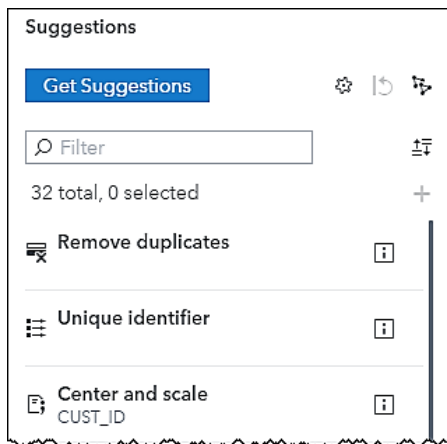
CUSTOMER_NAME
Stephen seiters
Doug mAttrisciano
bridget Knightly
Kennith Kirklin
James Mitchell
kathleen Beresnyak

Partial List of the Standardized Data

CUSTOMER_NAME
Stephen Seiters
Doug Matrisciano
Bridget Knightly
Kennith Kirklin
James Mitchell
Kathleen Beresnyak

The casing for the CUSTOMER\_NAME column is now consistent. Other standardizations such as applying consistent abbreviations to name suffixes might have been applied, but we can see that the data in the first six rows are now consistently in proper case.

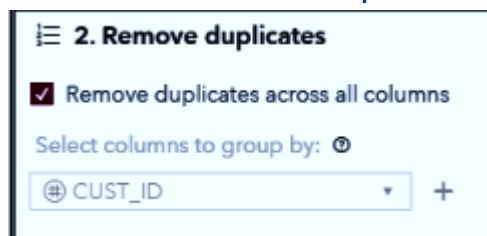
- q. Click the X to remove the Standardize filter.
- r. Click Get Suggestions in the Suggestions pane to regenerate the suggestions.



- s. Enter CUSTOMER\_NAME in the Filter box
  - ▶ The Standardize CUSTOMER\_NAME suggestion has been removed from the list of suggestions because it was already applied to the session table.
  - ▶ The suggestions evaluate the session table as we update it. If we create more columns, suggestions might be generated for those columns as well.
- t. **Screenshot your page of Bank\_Customers updated as in the output figure B.**

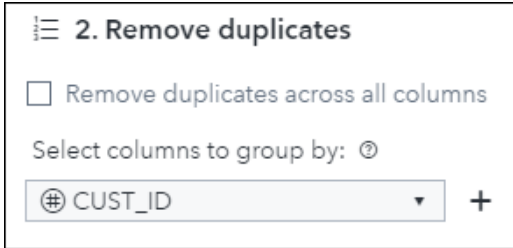
### 3. Add and configure the Remove duplicates suggestion


- a. Double-click the Remove duplicates suggestion

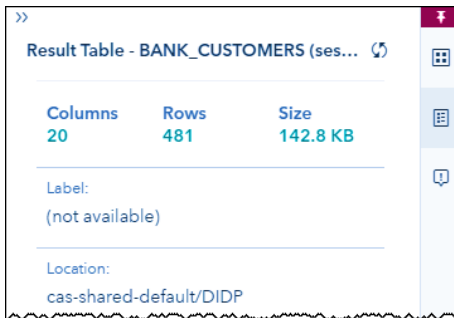


We can choose to remove duplicates based on the values of one or more specific columns instead of using all columns. As an ID value for the table, we want **CUST\_ID to be unique**, so let's remove duplicates by the CUST\_ID column.

- b. Clear the Remove duplicates across all columns option. Select the CUST\_ID column as the column to group by.



- c. Click  (Properties for the Result table) in the right pane. There are **currently 483 rows** in the table.
- d. Click Run. The **new row count is 481**. Two rows with duplicate CUST\_ID values were removed



Columns	Rows	Size
20	481	142.8 KB

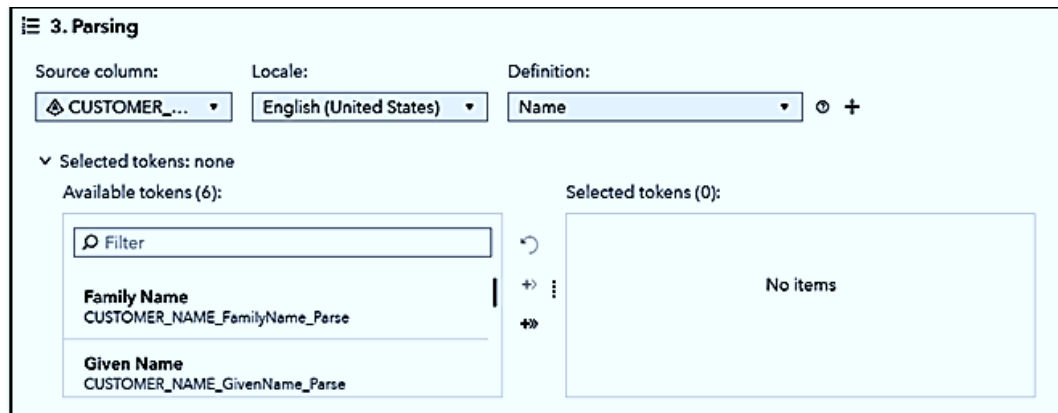
Label:  
(not available)

Location:  
cas-shared-default/DIDP

- e. **Screenshot your page of removing duplicates Cust\_Id as in the output figure C.**

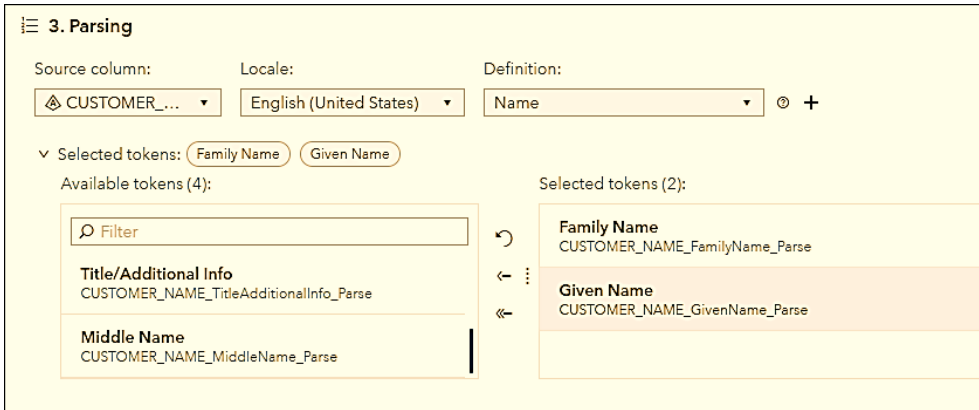
#### 4. Add the Parsing CUSTOMER\_NAME suggestion.

- a. Double-click the Parsing CUSTOMER\_NAME suggestion.
- ▶ The **Parsing** transform enables us to **break up a string into smaller semantic pieces** called **tokens**.
  - ▶ For example, a Name string might have smaller pieces like a first name, middle name, or last name, which all have meaning separate from the larger value.



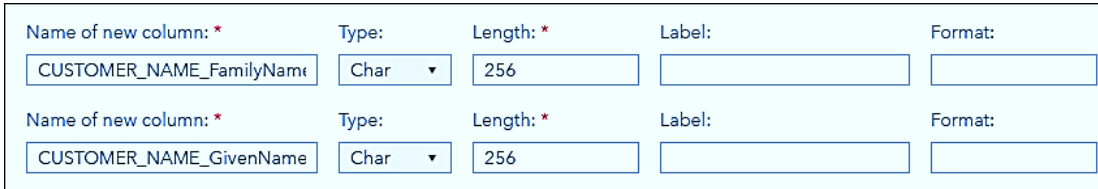
- b. Verify that the CUSTOMER\_NAME column is selected as the source column.
- c. Verify that the selected locale is English (United States).
- d. Verify that the selected definition is Name.
- e. Double-click the Family Name token to add it to the Selected tokens box.

- f. Double-click the Given Name token to add it to the Selected tokens box



Notice the long column name under the token name. We will change these to simpler column names.

- g. Click "Options for new columns".



In this window, you can change column properties.

- h. Rename CUSTOMER\_NAME\_FamilyName\_Parse to Last\_Name.
- i. Rename CUSTOMER\_NAME\_GivenName\_Parse to First\_Name.
- j. Changes Length for First and Last Name to 64
- k. Click OK to save the column properties.
- l. Click Run to run the data preparation plan.

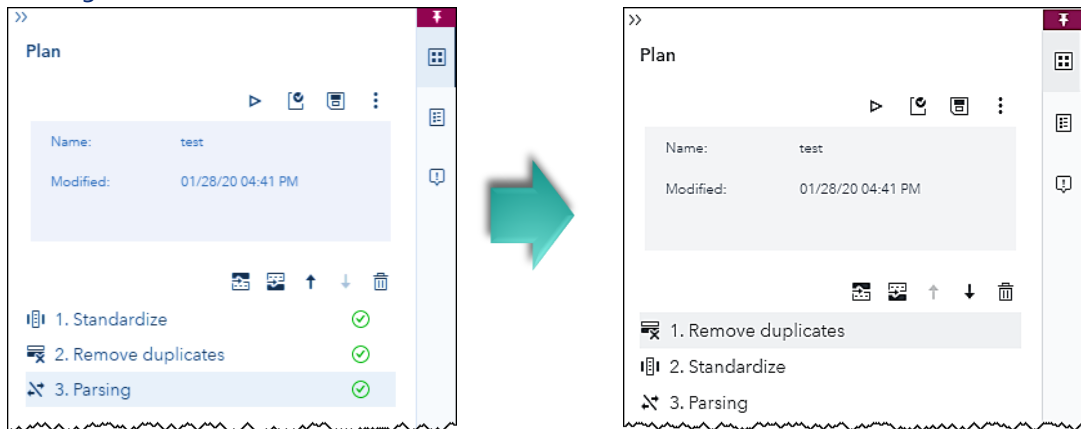
 Last_Name	 First_Name
Seiters	Stephen
Matrisciano	Doug
Knightly	Bridget
Kirklin	Kennith
Mitchell	James



There are now two new columns for First\_Name and Last\_Name.

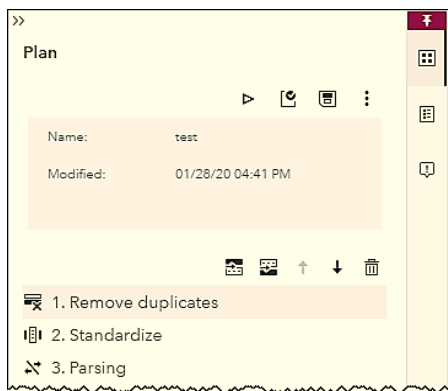
- m. Screenshot your parsing page of Customer\_name suggestion as in the output figure D

## 5. Change the order of the transforms.


### a. Change the order of the transforms.



- If our data had a lot of duplicates, it would be more efficient to remove duplicates before doing other processing. Let's make that transform the first one to run.
- If necessary, click  (Plan).
- Click the Remove duplicates transform.
- Click  (up arrow) to move it above Standardize



Remove duplicates is now the first transform in the plan.

- Save the plan.** Click  (Options) in the upper right corner to see the plan options.
- Click Save As to save the plan as follows:

Save As

🔍

Folders > My Folder > IS-429

My Favorites	IS-429	Clean
My Folder	My Snippets	Clean
SAS Content	My Tasks	Empty
	SAS Videos	Filter

Name: IS-429 Week#8A Using Suggestion NIM Name Type: Data plan


☒ Save plan and target table
 ☐ Save plan
 ☐ Save target table

Target table name: \*

BANK\_CUSTOMERS\_NIM

Label:

NIM yourName

Format: 

sashdat


Library:

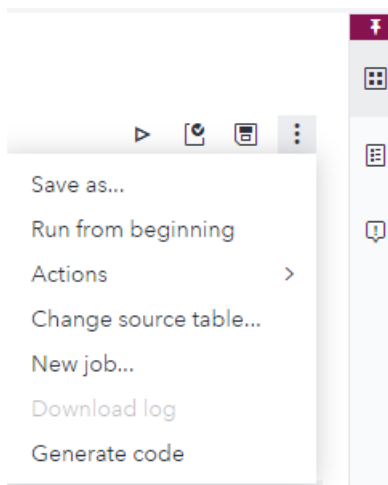
cas-v4e041-default/DI...

☒ Save as an in-memory table only

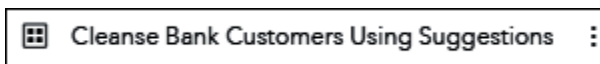
If the name of the target table already exists: ☐ Cancel save ☒ Replace table

Save
Cancel

- h. Verify that Save plan and target table is selected.
  - ▶ We can open and change or run saved plans later.
  - ▶ If we save the target table, we can open and use it in different applications or as a source for a new plan.
- i. Verify that sashdat is selected as the format.
  - ▶ Target tables can be saved in many formats depending on the target caslib.
  - ▶ For PATH caslibs, the target formats include SASHDAT, TXT, CSV, SAS7BDAT, XLSX, XLS, PARQUET, and ORC. If you do not need to save the data on disk, the Save as in-memory table only check box enables you to load the table to memory without saving it to disk.
- j. Click Save to your folder.. Click  Options) and **Generate code for your Plan:**



- ▶ The system will automatically generate the code in SAS format and place it directly into the "download" folder in your workspace with a .txt file format.
- ▶ **Rename your plan code generated as "IS-429 Lab Week#8 Plan NIM Name.sas"**
- ▶ Select Close to close the plan.

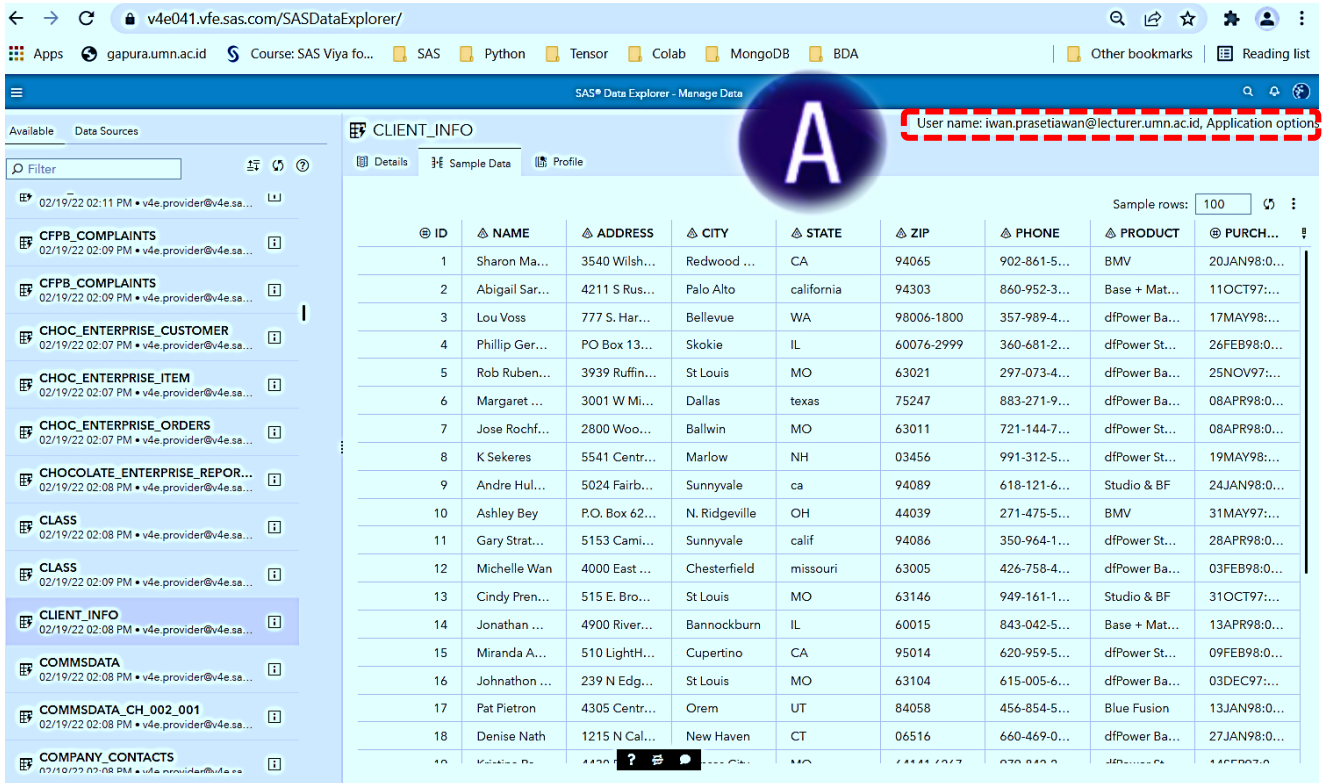


- k. Return to SAS [SAS DataExplorer](#)
- n. **Screenhot your Saved Plan page as in the output figure E.**

➡ Finally, today's practicum is over, **collect your doc/docx and sas file into IS-429 Week#8 NIM yourName.zip** and submit immediately today to e-Learning IS-429 Practicum Week#8

## RESULTS/ OUTPUT

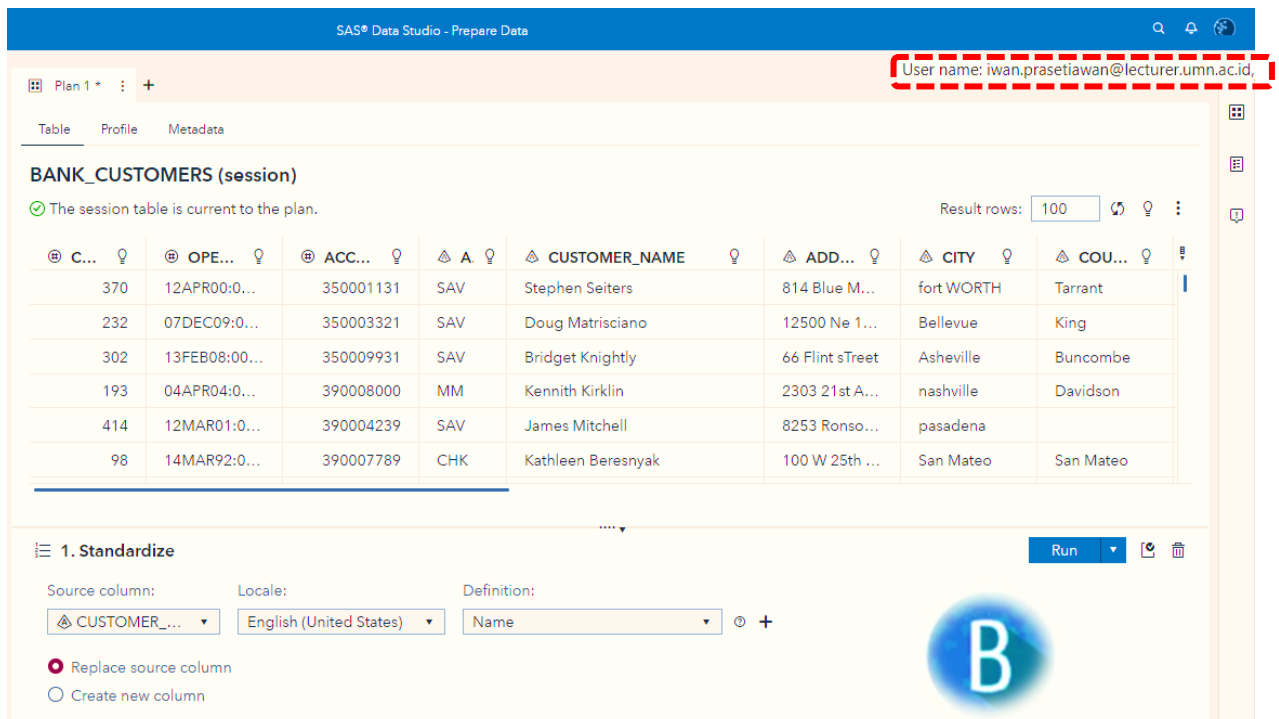
### A. SAS Drive Explorer: Explore and load the CLIENT\_INFO table



The screenshot shows the SAS Drive Explorer interface. The browser address bar displays `v4e041.vfe.sas.com/SASDataExplorer/`. The user is logged in as `ivan.prasetiawan@lecturer.umn.ac.id`. The left sidebar shows a list of data sources, with `CLIENT_INFO` selected. The main area displays a table with columns: ID, NAME, ADDRESS, CITY, STATE, ZIP, PHONE, PRODUCT, and PURCH... The table contains 18 rows of customer data.

ID	NAME	ADDRESS	CITY	STATE	ZIP	PHONE	PRODUCT	PURCH...
1	Sharon Ma...	3540 Wilsh...	Redwood ...	CA	94065	902-861-5...	BMW	20JAN98:0...
2	Abigail Sar...	4211 S Rus...	Palo Alto	california	94303	860-952-3...	Base + Mat...	11OCT97:...
3	Lou Voss	777 S. Har...	Bellevue	WA	98006-1800	357-989-4...	dfPower Ba...	17MAY98:...
4	Phillip Ger...	PO Box 13...	Skokie	IL	60076-2999	360-681-2...	dfPower St...	26FEB98:0...
5	Rob Ruben...	3939 Ruffin...	St Louis	MO	63021	297-073-4...	dfPower Ba...	25NOV97:...
6	Margaret ...	3001 W Mi...	Dallas	texas	75247	883-271-9...	dfPower Ba...	08APR98:0...
7	Jose Rochf...	2800 Woo...	Ballwin	MO	63011	721-144-7...	dfPower St...	08APR98:0...
8	K Sekeres	5541 Centr...	Marlow	NH	03456	991-312-5...	dfPower St...	19MAY98:...
9	Andre Hul...	5024 Fairb...	Sunnyvale	ca	94089	618-121-6...	Studio & BF	24JAN98:0...
10	Ashley Bey	P.O. Box 62...	N. Ridgeville	OH	44039	271-475-5...	BMW	31MAY97:...
11	Gary Strat...	5153 Cami...	Sunnyvale	calif	94086	350-964-1...	dfPower St...	28APR98:0...
12	Michelle Wan	4000 East ...	Chesterfield	missouri	63005	426-758-4...	dfPower Ba...	03FEB98:0...
13	Cindy Pren...	515 E. Bro...	St Louis	MO	63146	949-161-1...	Studio & BF	31OCT97:...
14	Jonathan ...	4900 River...	Bannockburn	IL	60015	843-042-5...	Base + Mat...	13APR98:0...
15	Miranda A...	510 LightH...	Cupertino	CA	95014	620-959-5...	dfPower St...	09FEB98:0...
16	Johnathon ...	239 N Edg...	St Louis	MO	63104	615-005-6...	dfPower Ba...	03DEC97:...
17	Pat Pietron	4305 Centr...	Orem	UT	84058	456-854-5...	Blue Fusion	13JAN98:0...
18	Denise Nath	1215 N Cal...	New Haven	CT	06516	660-469-0...	dfPower Ba...	27JAN98:0...

### B. SAS Data Studio, Using Suggestions to Prepare Data: Standardize Customer\_Name



The screenshot shows the SAS Data Studio interface. The user is logged in as `ivan.prasetiawan@lecturer.umn.ac.id`. The main area displays a table with columns: C..., OPE..., ACC..., A..., CUSTOMER\_NAME, ADD..., CITY, and COU... The table contains 6 rows of customer data. Below the table, the '1. Standardize' step is configured. The source column is `CUSTOMER_...`, the locale is `English (United States)`, and the definition is `Name`. The 'Run' button is visible.

C...	OPE...	ACC...	A...	CUSTOMER_NAME	ADD...	CITY	COU...
370	12APR00:0...	350001131	SAV	Stephen Seiters	814 Blue M...	fort WORTH	Tarrant
232	07DEC09:0...	350003321	SAV	Doug Matriciano	12500 Ne 1...	Bellevue	King
302	13FEB08:00...	350009931	SAV	Bridget Knightly	66 Flint sTreet	Asheville	Buncombe
193	04APR04:0...	390008000	MM	Kenneth Kirklin	2303 21st A...	nashville	Davidson
414	12MAR01:0...	390004239	SAV	James Mitchell	8253 Ronso...	pasadena	
98	14MAR92:0...	390007789	CHK	Kathleen Beresnyak	100 W 25th ...	San Mateo	San Mateo

## C. Add and configure the Remove duplicates suggestion

SAS® Data Studio - Prepare Data

User name: iwan.prasetiawan@lecturer.umn.ac.id

Result Table - BANK\_CUSTOMERS (session)

Columns	Rows	Size
20	481	142.8 KB

Label: (not available)

Location: cas-v4e041-default/DIDP25

Date created: Feb 28, 2022 12:36 AM

Date modified: Feb 28, 2022 12:36 AM

Date last accessed: Feb 28, 2022 12:36 AM

Source table: (not available)

Source CAS Library: (not available)

Encoding: utf-8

2. Remove duplicates

☐ Remove duplicates across all columns

Select columns to group by: CUST\_ID

Run

## D. Add the Parsing CUSTOMER\_NAME suggestion

SAS® Data Studio - Prepare Data

User name: iwan.prasetiawan@lecturer.umn.ac.id, Application o

Plan

Name: Cleanse Bank Customer...

Modified: 12/24/21 09:09 PM

1. Remove duplicates

2. Standardize

3. Parsing

Definition:

Name

Selected tokens: Family Name Given Name

Available tokens (4):

Filter

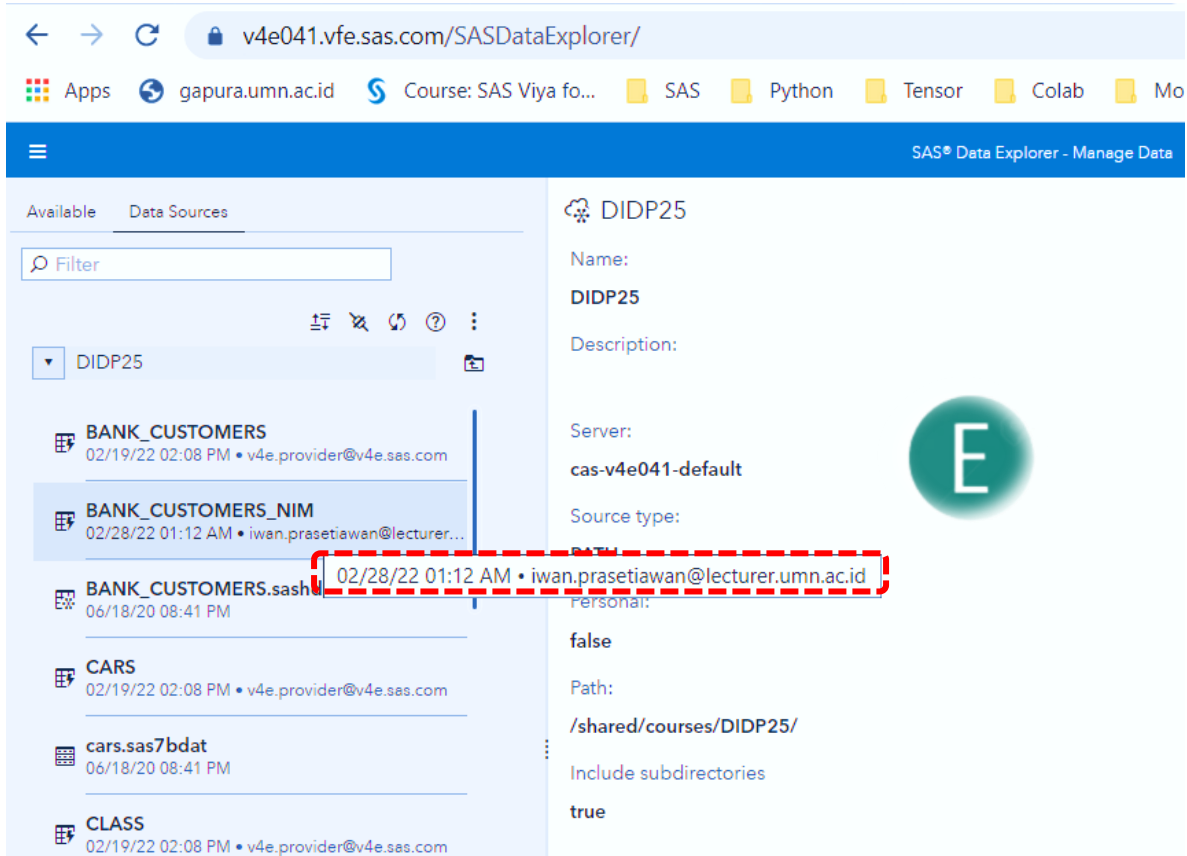
Middle Name  
CUSTOMER\_NAME\_MiddleName\_Parse

Prefix  
CUSTOMER\_NAME\_Prefix\_Parse

Options for new columns

Run

## E. SAS Data Explorer: New Bank Customer of yours adding the DIDP25 CAS table.



The screenshot shows the SAS Data Explorer web interface. The browser address bar displays `v4e041.vfe.sas.com/SASDataExplorer/`. The top navigation bar includes links for Apps, gapura.umn.ac.id, Course: SAS Viya fo..., and various application icons (SAS, Python, Tensor, Colab, Mo). The main header reads "SAS® Data Explorer - Manage Data".

On the left, under the "Data Sources" tab, a list of data sources is shown. The source "BANK\_CUSTOMERS\_NIM" is selected, with details: "02/28/22 01:12 AM • iwan.prasetiawan@lecturer...". A red dashed box highlights the timestamp and email address. Below it, "BANK\_CUSTOMERS.sash" is listed with details: "06/18/20 08:41 PM". Other sources include "CARS", "cars.sas7bdat", and "CLASS".

On the right, the configuration for the selected "BANK\_CUSTOMERS\_NIM" source is displayed:

- Name: DIDP25
- Description:
- Server: cas-v4e041-default
- Source type:
- Personal:
- false
- Path: /shared/courses/DIDP25/
- Include subdirectories: true

The  
End

## REFERENCE

1. Anna Yarbrough. 2020. Introduction to Data Curation for SAS® Data Scientists Course Notes. SAS Institute Inc. Cary, NC, USA.
2. SAS Institute Inc. 2020. SAS® Viya® Programming: Getting Started. SAS Institute Inc. Cary, NC, USA.
3. Johnny Starling, Erin Winters, and Anna Yarbrough. 2020. Self-Service Data Preparation in SAS® Viya® Course Notes. . SAS Institute Inc. Cary, NC, USA
4. [SAS® Support | Documentation](#)
5. Other additional references are excerpts from various Online Learning/websites.