Sharing and Managing Reports

Sharing and Managing Reports

1. Sharing Reports

2. Managing Reports

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New Content with Viya 3.4

The presence of an orange triangle in the lower left corner of a slide means:

- This slide has new content that is specific to Viya 3.4

- This content was either not available or not supported with previous releases

This Orange Triangle

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VA 8.3 Features – Sharing and Managing Reports

- Generate guest mode link for reports

- Group support for Alerts

- Option to turn off PDF attachment in report distribution email

How Can Reports be Shared?

Task	VA Edit Mode	VA Report Viewer
Print to PDF	✔	✔
E-mail Report	✔	✔
Export Data to .xlsx, .tsv, .csv	✔	✔
Save image	✔	✔
Generate Link	✔	✔
Distribute reports	✔	
Generate alerts	✔	

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Printing Reports

In the Viewer, select **Print** from the report Overflow menu to print the report or **Print Object** from the object Overflow menu.

In Edit Mode, select **Print** from the report Overflow menu.

A PDF file is created, which can be viewed, shared, or printed.

When printing an object, the **Select Objects** check boxes do not display.

Print to PDF

Document Setup | Select Objects

Page Setup

Paper size:
Letter

Orientation:
- Portrait
- Landscape

Margins

Units:
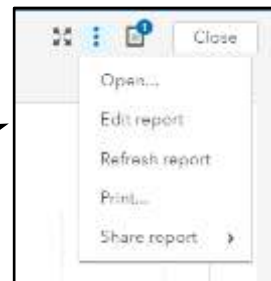Inches

Top: 0.25   Right: 0.25
Left: 0.25   Bottom: 0.25

Options

Show page numbers:
Show empty rows and columns in table:
Include printed Table of Contents:
Include appendix information:
Include comments:
Include supplemental tables:
Expand clipped and non-visible content:
Include cover page:

Cover page text:

Print | Cancel

Print to PDF

Document Setup | Select Objects

Choose visual elements:
- Print all items
- Print selected items

Objects:
- [ ] Select
  - [ ] Page 1
    - [ ] List Table 1
    - [ ] Bar Chart 1

Print | Cancel

Origin
Asia
Asia
Asia
Europe
Europe
Europe

Maximize
Save image
Export data...
Print object...
Share object...

Open...
Edit report
Refresh report
Print...
Share report

Close

New
Open
Save
Save as
View report
Print...
Distribute report...

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Emailing Reports

In the Viewer, select **Share report→Email** from the report Overflow menu.

In Edit Mode, select **Share report→Email** from the report Overflow menu.

Report name: Sample Report

Modified by: null
Access this report via this url:
http://sasserver.demo.sas.com/links/resources/report?uri=/reports/reports/3a96f1a4-fd30-4949-b60b-3d1201c0c8b3&page=vi6

Printing or Emailing from your Report List

You can also print and email reports from your list of viewed reports in the Viewer in both table view and tile view.

Exporting Data from Report Objects to .xlsx, .tsv, .csv
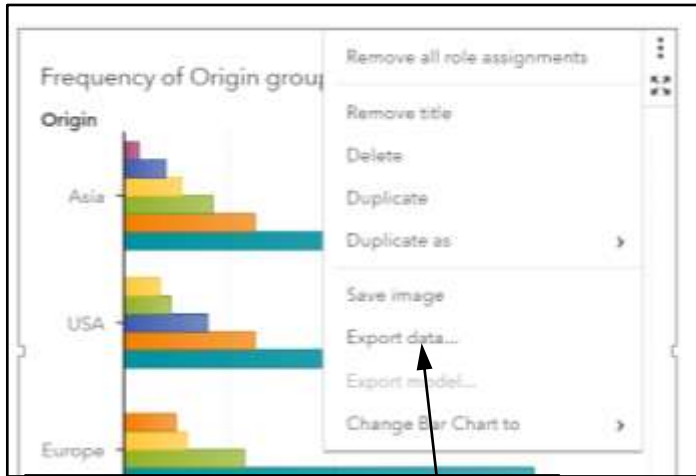
From the object overflow menu in Edit mode or in the Viewer, select **Export Data**
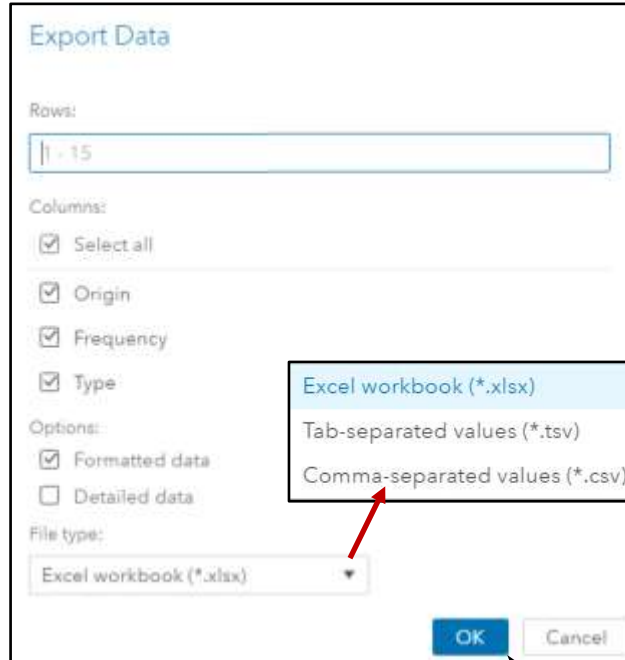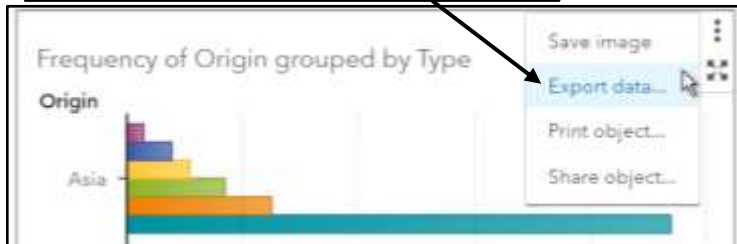
When you click OK, the spreadsheet is created in \Users\user\Downloads.

Saving an Image of an Object
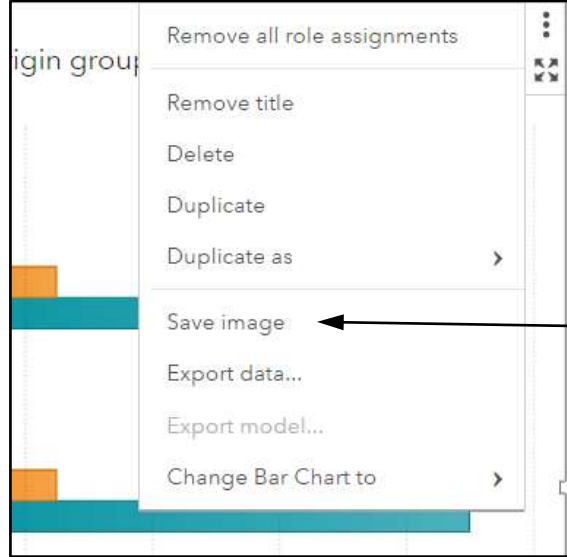
In Edit mode or in the Viewer, from the Object Overflow menu, select **Save image**.
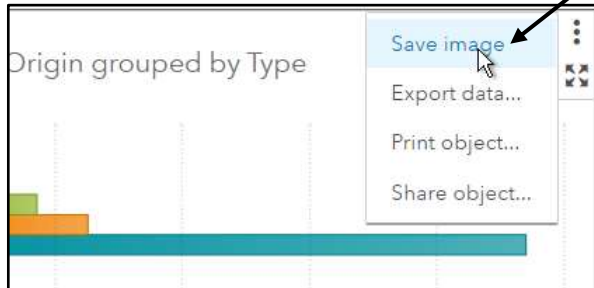
The image is saves as a .png file.

Generating a Report Link
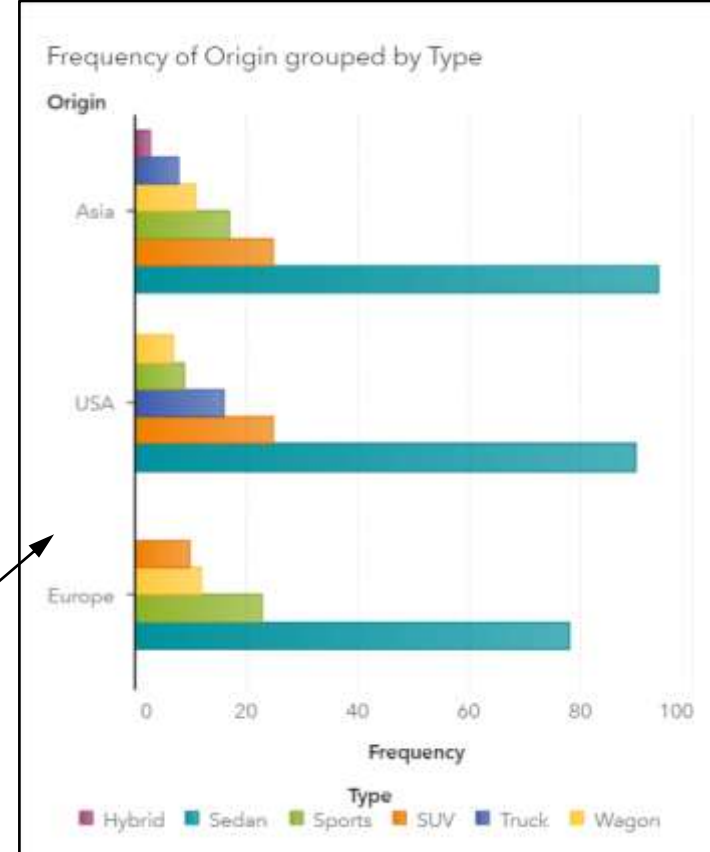
In Edit mode or in the Viewer, from the Object Overflow menu, select **Share Report→Link**

You can control Link Options.

Report Image creates a link to an SVG image of the report.

Embeddable link can be embedded in a iFrame.

Generate Link

Interactive Report | Report Image

☐ Embeddable link

Link Options   Reset

Alerts pane: ⬤   Application banner: ⓘ   ⬤

Comments pane: ⬤   Menu bar: ⓘ   ⬤

Information pane: ⓘ ⬤

Printing: ⬤

Sharing: ⬤

Link:

http://sasviya01.race.sas.com/SASReportViewer/?
reportUri=%2Freports%2Freports%2Fe8bd5d70-f23a-412c-a007-
81a632d08702&page=vi6

Copy Link   Cancel

Generate Link

Interactive Report | Report Image

The link below will share an SVG file of the current view.

Link:

http://sasviya01.race.sas.com/reportImages/directImage?
reportUri=%2Freports%2Freports%2Fe8bd5d70-f23a-412c-a007-
81a632d08702&size=1200x1000&layoutType=entireSection&sectionIndex=0

Link:

<iframe src="http://sasviya01.race.sas.com/SASReportViewer/?
reportUri=%2Freports%2Freports%2Fe8bd5d70-f23a-412c-a007-
81a632d08702&page=vi6&reportViewOnly=true&appSwitcherDisabled=true">
</iframe>

Copy Link   Cancel

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Generating a Report Object Link

In the Viewer, on the Object Overflow menu, select **Share object.**

Generate Link

Interactive Report | Report Image

☐ Embeddable link

Link Options   Reset

Printing: ●

Sharing: ●

Link:

http://sasviya01.race.sas.com/SASReportViewer/?
reportUri=%2Freports%2Freports%2Fe8bd5d70-f23a-412c-a007-
81a632d08702&page=vi6&objectName=ve64

Copy Link | Cancel

You can generate both the embeddable link and the image link, but the Link options are limited to printing and sharing.

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Who can Distribute Reports?

Rules

ApplicationAdministrators ✕

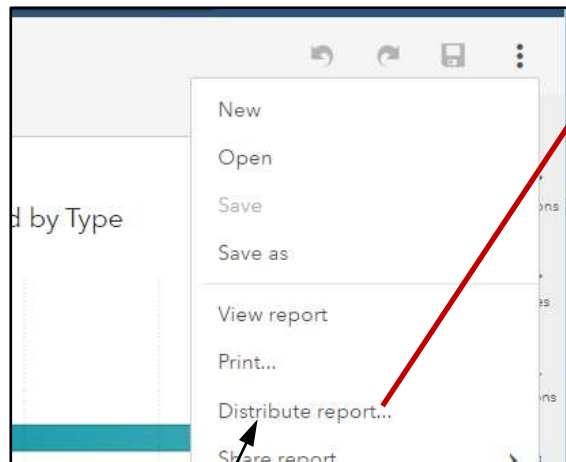| Object URI	Principal	Setting	Permissions	Description
/collections/sharedCollections/**	ApplicationAdministra...	Grant	Create, Delete, Read, Update	Administrators can manage shared collections.
/home/sharedLinks/**	ApplicationAdministra...	Grant	Create, Delete, Read, Update	
/themeContent/**			e, Delete, Update	ent.
/themes/themes/@defaultApplicationTheme/*			te	
/themes/themes			te	
/themes/themes/*	ApplicationAdministra...	Grant	Delete, Update	Administrators can update and delete themes.
/themes/publishedThemes/*	ApplicationAdministra...	Grant	Create, Delete	Administrators can publish and unpublish themes.
/themes/themes/@defaultReportTheme/*	ApplicationAdministra...	Grant	Create	Administrators can set the default report theme.
/SASThemeDesigner/**	ApplicationAdministra...	Grant	Read	Allow access to an application.
/reportDistribution/distributions/**	ApplicationAdministra...	Grant	Create, Delete, Read, Update	Administrators can execute a report distribution.
/reportDistribution/distributionRequests/**	ApplicationAdministra...	Grant	Create, Delete, Read, Update	Administrators can create and edit requests to schedule reports.
/reportDistribution/scheduler/**	ApplicationAdministra...	Grant	Create, Delete, Read, Update	Administrators can create and edit schedules on report distributi...
/reportImages/images/**	ApplicationAdministra...	Grant	Delete, Read	Admin access, allows clearing the cache
/SASVisualAnalytics/rest/customGraphTypes/**	ApplicationAdministra...	Grant	Create, Delete, Update	Allow custom graph types access.

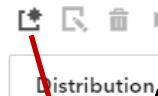Access to report distribution is controlled by these rules.

Initially, only Application Administrators can distribute reports.

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Distributing Reports

Distribute Report

Distribution

CarsReport

Any currently defined distributions are listed.

New
Open
Save
Save as
View report
Print...
Distribute report...
Share report

by Type

(1)

In Edit mode, from the report Overflow menu, select Distribute report

(2)

New Report Distribution

Distribution name: *

CarsReport

Recipients:

Beth Ebersole ⊗   Bobbie Wagoner ⊗

Email subject:

The new Cars Report is here

Email message:

Take a look at this please and give me a call.

Schedule:

(4)

Choose Members

Selected members:

🔍 Filter

Allen Cunningham (sashac)   ✛

Application Administrators
(ApplicationAdministrators)   ✛

Beth Ebersole (beeber)   ✛

Bobbie Wagoner (sasbow)   ✛

OK   Cancel

(3)

Close

Create new schedule

OK   Cancel

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Completing the Schedule for Distribution

- You can select any Frequency, Time, Time zone, Start date, and End.
- The interface adjusts to the Frequency type that you select.

Generating Email Alerts on Interval Display Rules

Create a new display rule on the Rules panel for an object or

Defining URL Mappings for Data-Driven Content

Administration Settings

Data-Driven Content URL Mappings:

| Display Label | URL | 🗑 |

+ New

In Edit mode, select Edit Administration settings from the **Overflow** menu.

OK   Cancel

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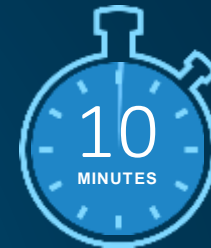
Hands-On Exercise

Complete the steps in:

Desktop\Hands-on\VIYAVISUAL\GELVIYAVISUAL_06Sharing_01ShareManage

Tasks:

- Produce a report pdf
- Save a report image
- Add comments to a report
- Export report data
- Generate a report link

7. The saved image:

9. The exported spreadsheet:

	A	B	C	
1	Product Line	Unit Yield (actual	Unit Yield (target	
2	Game	3667996	3843384	
3	Promotional	2192764	2741700	
4	Action Figure	1854353	2177550	
5	Stuffed Anin	1531	1786	
6				
7				

11. You are unable to distribute the report because you do not have appropriate access to that functionality. You would need to be a member of the Application Administrators group.

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Saving Reports (from Edit mode)
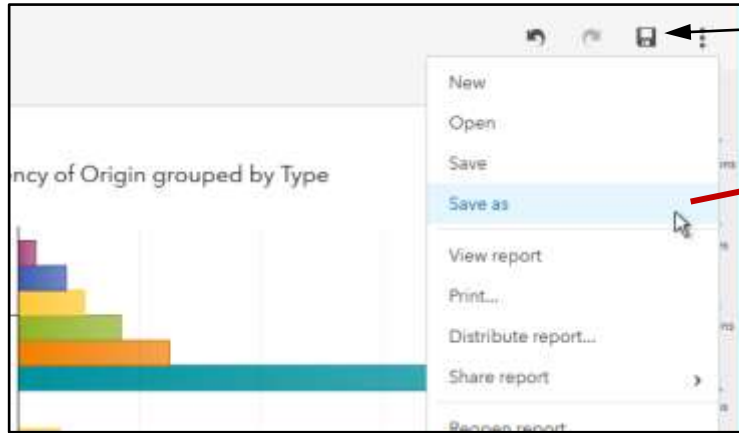
When you make a report edit, the Save icon on the toolbar is ungrayed.
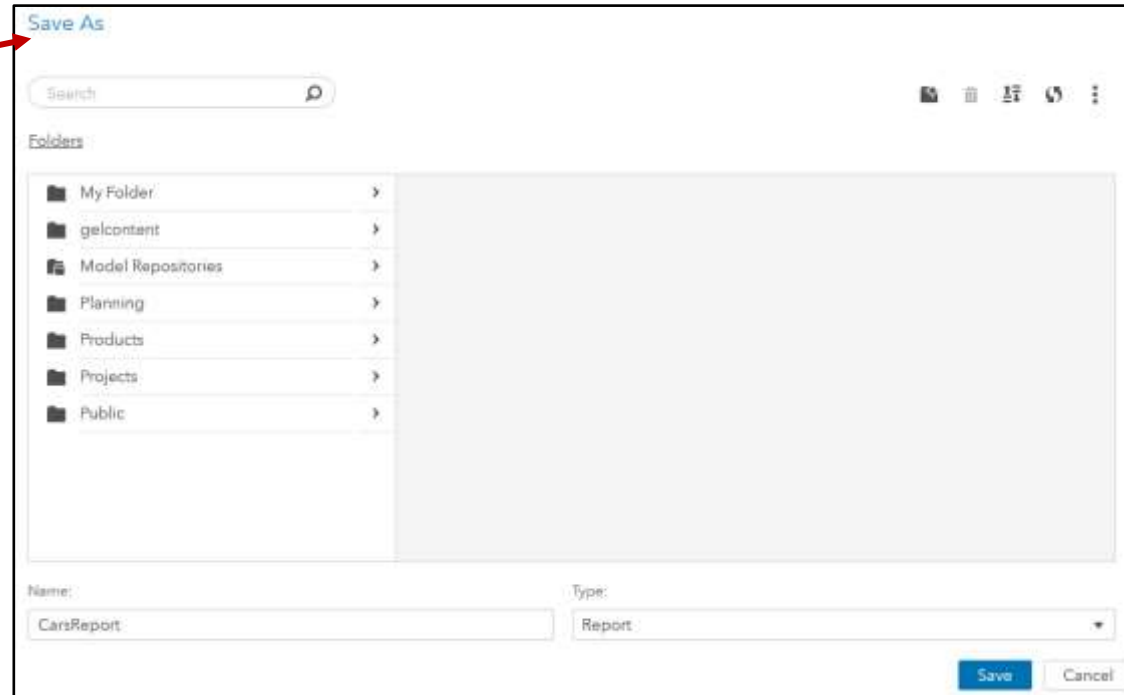
In order to save a report to a folder, you must have permissions to add objects to the folder.

Deleting Reports

Open

Search

indata	Analysis	Actions
ALYTICS	Data Plans	Auto Controls Demo
ple	Reports	CarsReport
elp	Work in Progress	Containers
JAL		rces Mappin...
DMML		el
		el

You can delete a report by selecting the report and clicking the garbage can icon.

Name:

CarsReport

Type:

Report

Open   Cancel

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Client-side Thresholds for Report Objects

Object	Rows
Crosstab	displays an error message if the server returns more than 40,000 rows.
List table	truncates the data after 40,000 rows.
Bar chart (regular, targeted, and dual axis)	truncates the data after 3,000 rows.
Box plot	displays an error message if the data would create more than 800 boxes.
Bubble change plot	displays an error message if the server returns more than 3,000 rows.
Bubble plot	displays an error message if the server returns more than 25,000 rows.
Butterfly chart	displays an error message if the server returns more than 3,000 rows.
Correlation matrix	allows only 60 measures to be assigned.
Dual axis bar-line chart	displays an error message if the server returns more than 3,000 rows.
Gauge	with the **Group** role assigned, truncates the data after 500 rows.
Geo map	for the region map style, displays an error if the server returns more than 5,000 rows. An error is displayed if a request to the polygon provider returns more than 250,000 vertices.
	for the bubble map style, displays an error if the server returns more than 25,000 rows.
	for the coordinates map style, displays an error if the server returns more than 40,000 rows.
Heat map	when category values are assigned, displays an error if the server returns more than 3,000 rows.
Histogram	has no client or server cardinality limits.
Line chart (regular and dual axis line)	truncates the data after 3,000 rows.
Needle plot	displays an error message if the server returns more than 3,000 rows.
Numeric series plot	displays an error message if the server returns more than 3,000 rows.
Pie chart	displays an error message if the server returns more than 3,000 rows.
Scatter plot	displays an error message if the server returns more than 40,000 rows.

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Client-side Thresholds for Report Objects (continued)

Object	Rows
Scatter plot	displays an error message if the server returns more than 40,000 rows.
Schedule chart	displays an error message if the server returns more than 3,000 rows.
Step plot	displays an error message if the server returns more than 3,000 rows.
Time series plot (regular and dual axis)	displays an error message if the server returns more than 10,000 rows.
Treemap	truncates the data after 1,500 rows.
Vector plot	displays an error message if the server returns more than 3,000 rows.
Waterfall chart	displays an error message if the server returns more than 3,000 rows.
Word cloud	truncates the data to the value of the **Word display limit** option. The maximum value is 100.
Button bar	truncates the data after 100 rows
Drop-down list	truncates the data after 500 rows
List	truncates the data after 50,000 rows
Decision tree	displays an error if the server returns more than 100,000 rows for the response values, or more than 10,240 rows for the predictor values.
Network	displays an error message if network contains more than 25,000 nodes and links.
Text topics	displays an error message if the data source contains more than 10,000,000 rows.
	truncates the number of topics to 13.
	truncates the number of terms to 100.
	truncates the number of documents to 1,000.
Data-driven content	truncates the data after 40,000 rows.

sas.reportdata.properties Configuration

SAS® Environment Manager - Manage Environment   Search   Bobbie Wagoner ▾

Configuration

View: Definitions ▾   Filter   ⟳

- sas.reportalerts
- sas.reportalertseval
- **sas.reportdata.properties**
- sas.reportdata.system
- sas.reportdistribution
- sas.reportdistribution.mail
- sas.reportimages
- sas.reportimages.config
- sas.reportpackages.properties
- sas.reportpackages.system
- sas.reportrenderer.properties
- sas.reportrenderer.system
- sas.scheduler
- sas.scoreexecution
- sas.search
- sas.searchindex
- sas.security

Filter

The set of configuration properties for the Report Data service.
The following configuration instances are defined by the configuration definition
"sas.reportdata.properties":

▾ Report Data service, Report Packages service, Report Renderer service

GUID: 81de0df1-bf2f-4ea4-a3cc-b6a11eb416a5
The globally unique identifier for the configuration instance.

Services: R_____service, Report Renderer service
O_____ration instance applies.

comparisonEpsilon: 1e-12
The number in E notation that is the variability allowed when co_____
floating point numbers for equality.

decisionTreePredic...   10240
The maximum cardinality of independent variables allowed to run a decision
tree.

> An administrator can edit these.

> Scroll down to view thresholds.

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Distinct Count—Ignore Missing (Yes or No?)

By default, missing values are included in the Distinct Count calculation for category data items.

An administrator can toggle this switch to have missing values excluded.

Overriding Data Limits for an Object

- In VA 8.2 on the Options tab, the Object option **Override system data limit** enables you to override the cardinality thresholds for a report object.

- When you check the option, the data limit displays, and you can modify the value.

Do not override system values carelessly—changes will directly affect performance.

Report Localization

Able to create additional translations of report attributes so that a users' browser locale preference dictates which attributes are returned.

- One report can have multiple translations

- ISO 693 two-letter language code and two-letter country code used to identify the translated text

```
en_US
vi6.Section.label = Page 1 Bars Chart Shows Trend Clearly
vi78.Section.label = Page 2 Scatter
ve38.Graph.label = Auto Chart 1
ve47.Graph.label = Auto Chart 2
bi11.DataItem_AIRPORT4_NETWORK_centr_degree_out.label = centr_degree_out
bi15.DataItem_AIRPORT4_NETWORK_DestCityLat.label = Dest City Latitude
bi16.DataItem_AIRPORT4_NETWORK_DestCityLng.label = Dest City Longitude
bi18.DataItem_AIRPORT4_NETWORK_DestCityName.label = Dest City Name
bi19.DataItem_AIRPORT4_NETWORK_DestState.label = Destination State
bi24.DataItem_AIRPORT4_NETWORK_Origin.label = Origin Code
bi28.DataItem_AIRPORT4_NETWORK_OriginCityLng.label = OriginCity Latitude
bi29.DataItem_AIRPORT4_NETWORK_OriginCityMarketID.label = Origin City MarketID
bi31.DataItem_AIRPORT4_NETWORK_OriginState.label = Origin State Code
bi33.DataItem_AIRPORT4_NETWORK_OriginStateName.label = Origin State Name
bi35.SourcePredefinedDataItem_AIRPORT4_NETWORK.label = Frequency
```

```
de
vi6.Section.label = Seite 1 Balkendiagramm zeigt deutlich die Richtung
vi78.Section.label = Seite 2 Punktdarstellung
ve38.Graph.label = Auto Grafik 1
ve47.Graph.label = Auto Grafik 2
bi11.DataItem_AIRPORT4_NETWORK_centr_degree_out.label = Grad der Zentralität
bi15.DataItem_AIRPORT4_NETWORK_DestCityLat.label = Dest Stadt Latitude
bi16.DataItem_AIRPORT4_NETWORK_DestCityLng.label = Dest Stadt Longitude
bi18.DataItem_AIRPORT4_NETWORK_DestCityName.label = Dest Stadt Name
bi19.DataItem_AIRPORT4_NETWORK_DestState.label = Destination State
bi24.DataItem_AIRPORT4_NETWORK_Origin.label = Abfahrt Code
bi28.DataItem_AIRPORT4_NETWORK_OriginCityLng.label = Abfahrt Stadt Latitude
bi29.DataItem_AIRPORT4_NETWORK_OriginCityMarketID.label = Abfahrt Stadt Markt ID
bi31.DataItem_AIRPORT4_NETWORK_OriginState.label = Abfahrt State Code
bi33.DataItem_AIRPORT4_NETWORK_OriginStateName.label = Abfahrt State Name
bi35.SourcePredefinedDataItem_AIRPORT4_NETWORK.label = Frequenz
```

Report Localization Steps

- VA 8.2 does not currently have an option to perform report localization through the user interface.

- VA 8.2 does provide a REST API to perform report localization.
  - Customer-facing documentation is not yet available.
  - The API is called ReportTransformsService and is considered production quality.
  - There is internal-only draft documentation here: http://swagger.na.sas.com/apis/reportTransforms/v2/apidoc.html
  - When available, the documentation should appear off this page: https://developer.sas.com/guides/rest.html
  - There is also a SASpedia page: http://sww.sas.com/saspedia/Report_Transforms_REST_API
  - The ReportTransformsService can also be used to change the data source for a report.

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Report Troubleshooting

If there are performance issues with a report, there is an **internal** diagnostic tool, useful for troubleshooting report data issues.

- From **Edit** mode, refresh the report, then click anywhere in the report, or on a specific report object.

- Use **Ctrl + Alt + q** to display the Query Diagnostics window.

- There is also some overview diagnostic information available by using **Ctrl Alt + p**. This tool displays a SAS Visual Analytics Diagnostics window, but does not provide the same level of detail as the Ctrl + Alt+ q tool.

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Query Diagnostics—Ctrl + Alt + q

Query Diagnostics

Report data: November 15, 2017 08:17:36 PM

Replay button

c44: List Table 1 - ve57   ▶ ↗ 3707 ms   🗑 **XML** JSON

Query   URL   **O Results**   Results (data)

```
<Result xmlns="http://www.sas.com/sasreportmodel/bird-4.1.0" ref="        nal" status="success" dataLevel="custom" label="Result
    <Variables>
        <StringVariable label="Make" ref="bi87" varname="bi
        <StringVariable label="Type" ref="bi89" varname="bi
        <StringVariable label="Origin" ref="bi90" varname=
        <StringVariable label="Invoice" ref="bi98" varname=
    </Variables>
    <Columns>
        <StringColumn maxLength="15" colname="c0" encoding=
        <StringColumn maxLength="8" colname="c1" encoding=
        <StringColumn maxLength="8" colname="c2" encoding=
        <StringColumn maxLength="10" colname="c3" encoding=
    </Columns>
    <DefinedSortItems>
        <DefinedSortItem variable="bi90" sortDirection="descending"/>
    </DefinedSortItems>
```

☑ Retrieve from cache
☑ Homogenize
☑ csv response
☐ CAS log
☐ BIData log
☐ String Table

You can select an element from the list and an output type to display before replaying the query.

Close

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Play Button—Query Timings

Performance Summary—Ctrl + Alt + p

SAS Visual Analytics Diagnostics

BIRD   Performance   Properties

Clear Performance Log

2017-05-16T17:20:59.615Z: Finished jQuery.require of ScriptLoader
Time: 266 ms.

2017-05-16T17:20:59.616Z: ScriptLoader: Start creating stuff...
Time: 267 ms.

2017-05-16T17:20:59.652Z: ScriptLoader: Finished creating _graph instance
Time: 303 ms.

2017-05-16T17:20:59.705Z: ScriptLoader: Finished creating _layoutOverlay instance
Time: 357 ms.

2017-05-16T17:20:59.707Z: ScriptLoader: Get template zip file
Time: 359 ms.

2017-05-16T17:21:00.533Z: ScriptLoader: Received template zip file
Time: 826 ms.

2017-05-16T17:21:00.567Z: ScriptLoader: Unzipped ArrayBuffer
Time: 860 ms.

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Performance Considerations

More complex reports with complex filters, multiple data sources, many objects per page, and complex calculations will, of course, take longer to display. Remain conscious of this when designing your reports.

Research is still in progress to identify any specific issues
For the VA 8.3 release.
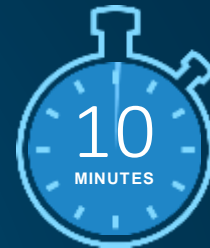
Hands-On Exercise

Task:

Try out Ctrl-Alt-q and Ctrl-Atl-p to view diagnostics on one of your favorite reports created in the class.

Additional References

High-Cardinality Thresholds for Report Objects in *SAS® Visual Analytics 8.3: Reference*

http://pubshelpcenter.unx.sas.com:8080/test/?cdcId=vacdc&cdcVersion=8.3&docsetId=varef&docsetTarget=p07uif0jfvtijon0zgbm5hiaqip4.htm&locale=en