Information Map Studio – Map Your Way through the Data for South Central SAS[®] Users Group Educational Forum 2014

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ABSTRACT

This reference document can serve as a summary instructional tool for SAS® Information Studio and is written to assist those responsible for providing access to data, such as an information architect, for data consumers. Topics covered include:

- Selecting Tables
- Table Relationships
- Selecting Data Items
- Organizing Data Items
- Creating a Custom Category or Calculated Data Item
- Single and Combination Filters
- Prompted Filters
- Test Queries
- Resource Replacement/Moving/Saving Information Maps

INTRODUCTION

In the simplest terms, SAS® Information Maps enable data consumers to access data. Information maps can be utilized by several SAS® products, including but not limited to Enterprise Guide, Add-In for Microsoft Office, Web-Report Studio and Information Delivery Portal.

Data consumers are not required to know or even understand SQL or the structure of the underlying data source. An information architect can utilize predefined business logic or calculations, filters, and prompts to aid the data consumer in querying data. By simplifying the process of data accessibility, data consumers can focus on analyzing data output rather than spending time learning how to access, modify or select data for analysis.

SELECTING TABLES

The first step in designing an information map is selecting one or more data tables or a single cube. (Note: You cannot use both tables and cubes in the same information map). In this example will be using table data.



You can select existing information maps from the folder tree or select tables to create a new information map from the server tree (above). The two different libraries used to select the tables are the BISREP-APPS-01 and BISREP-GL-01.

This specific information map (GL_Information Map) is designed by selecting 8 tables and creating a relationship between those tables.



TABLE RELATIONSHIPS

A table relationship is an association between data tables in an information map that generates a database join in a query. Typically, an information architect will have a data dictionary that outlines how tables relate to each other. This data dictionary serves as a blueprint for table relationships. *Appendix A includes a sample data dictionary for the GL_Information Map used in this example*.

By selecting the "Relationship" tab a graphical representation of the data source tables used and associated relationship nodes are provided (below).



You can view the properties of a relationship by right clicking or double clicking the relationship node (below).



You can insert a relationship by right clicking any table (below).



The relationship properties are displayed for the join between the FND_USER table and the GL_JE_BATCHES table. As you can see below, the relationship between these two tables is an inner join between USER_ID from the FND_USER table and CREATED_BY from the GL_JE_BATCHES table.

Library BISREP-APPS-01.FND_USER	•	one to on	•	Library BISREP-GL-01.GL_J	E_BATCHES	-
Duter join				🔲 O <u>u</u> ter join		
Queries will return: - Only those FND_USER rows with a single corr - Only those GL_JE_BATCHES rows with a sing	esponding GL_JE_BATCHES ro le corresponding FND_USER ro	N; W .				
Join keys (for table 1):		Operator:	Join keys (for table 2):			
						Add
USER_ID		= 🔞	CREATED_BY			Delețe

In addition, you can specify whether or not to perform an outer join and the type of cardinality between tables. Cardinality in a join is a property that describes whether one row or many rows in one table are associated with one row or many rows in the other table.

An advanced edit option is provided at the lower right hand side of the relationship properties window. However, once you create or modify a relationship expression using advanced edit, you will always be required to use the editor for all future updates of the expression.

Documenting each relationship from each table in a data dictionary will prove to be a valuable resource when training new employees to design, modify, and maintain information maps.

Selecting Data Items

A data item is a column in a data table that is either a logical view or a physical data field or calculation. There are three types of data items that can be used:

- Category (Can contain character data or numeric data)
- Measure (Contains numeric data and is used for computations)
- Hierarchy (Part of an OLAP cube arrangement of levels of a dimension)

You can use the drop down menu on any information map to view a specific data item type (below).



Organizing Data Items

Organizing data items for data consumers provides a more efficient method to search and select data to query. A simple method to organize data elements is to create folders. When you have hundreds of data items creating folders allows categorization of data elements, which often leads to indirectly grouping data that creates a custom query or report.



Creating a Custom Category or Calculated Data Item

When creating a custom category or calculated data item take the time to understand what you are trying to accomplish and write out the process. This provides documentation for your

thinking and helps you plan what you are trying to achieve. If time is an issue, utilize the target audience as a check. For example, if you are using logic to categorize transactions for your data consumers, review the logic and output with your target audience and to see if it makes sense to them.

🗖 SAS Information Map Studio: /Administra	tive Resources/BISREP/05 - Stage/GL Information M	ap	
<u>File Edit View Insert Tools Help</u>			
🔁 😅 🖬 昌 💁 🛩 🖎 陰	Y 🖆 🔟		
Resources - Information Map Folders	ew Data Item		« 1
	Selected Descurres	Information Man Contents	
W Föder Administrative Resources I definistrative Resources I definistrative Resources I o - Source Tables I o - Target Tables I o - Targe	SSAco SSAco Cherry SISEP-APP-01 Cherry SISEP-APP-01 Cherry SISEP-A-01 Cherry SISEP-0-01 Cherry SISEP-0-01 Chery SISEP-0-01 Cherry SISEP-0-01 Cherry SISEP-0-0	Show all terms Show all terms	
		🔀 AFarias 🔒 afarias@tpwd as Alejandro Farias	tpwd-aav-sas.tpwd.state.tx.us : 8561

You can create a data item by selecting New Data Item (above). Remember, the output can be numeric or a character. As an example, the following CASE statement produces a calculated result for JE Line Amount above.

CASE

```
WHEN <<GL_JE_LINES.ENTERED_CR>> IS MISSING
OR <<GL_JE_LINES.ENTERED_CR>> =0
THEN <<GL_JE_LINES.ENTERED_DR>>*-1
ELSE <<GL_JE_LINES.ENTERED_CR>>
END
```

The following CASE statement produces a character result.

```
CASE
WHEN
SUBSTRN (<<TPW_DET_FUNDS_AVAIL_ALL_V.PROJECT>>,1,2)='CC' & SUBSTRN
(<<TPW_DET_FUNDS_AVAIL_ALL_V.PROJECT>>,10,3)='.SP' THEN 'State Parks'
WHEN
SUBSTRN (<<TPW_DET_FUNDS_AVAIL_ALL_V.PROJECT>>,1,2)='CC' & SUBSTRN
(<<TPW_DET_FUNDS_AVAIL_ALL_V.PROJECT>>,10,3)='.CF' THEN 'Coastal Fisheries'
WHEN
```

SUBSTRN (<<TPW_DET_FUNDS_AVAIL_ALL_V.PROJECT>>,1,2)='CC' & SUBSTRN (<<TPW_DET_FUNDS_AVAIL_ALL_V.PROJECT>>,10,3)='.IF' THEN 'Inland Fisheries' ELSE 'REVIEW'

END

efinition	Definition	
lassifications, Aggregations, For	Data item name: JE Line Amount	
alue-Generation Method	ID: JE LINE AMOUNT	
retions	Location /	Browse
	Description: JE Line Amount	
	Include in the default query	
	Expression Settions	
elected Data Items		
E EINS MINOUR	Type: Numeric	
	Expression: CASE	-
	OR < <gl_je_lines.entered_cr>>=0</gl_je_lines.entered_cr>	
	THEN < <gl_je_lines.entered_dr>>*-1 ELSE <<gl_je_lines.entered_cr>></gl_je_lines.entered_cr></gl_je_lines.entered_dr>	_
	END	-
	Edt	
	.0	

Both examples are setup using the EDIT button under the Definition menu. Below are example screen shots depicting where the expression is designed and verified for use by the Validate Expression button.

🗐 Express	ion Editor 🛛 🔀
<u>N</u> ame:	JE Line Amount
Description:	JE Line Amount
<u>T</u> ype:	Numeric
Expression T	ext:
ELSE < <gl END</gl 	JE_LINES.ENTERED_CR>>
+ - *	/ ** AND OR NOT = <> < <= > >= =* '_' (_)
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All Fun Bitwise CASE of Charao Charao Counti Date a DBCS	ictions Logical Operations perator ster ter ter ter ter ter ter ter ter ter
	OK Cancel <u>H</u> elp

Single and Combination Filters

Single and combination filters can be created to help data consumers narrow the scope of a query. (My experience has proved time and time again the more defined the parameters of a query are, the faster the result). You can assign static values to filters by using the New Filter icon). Below are four examples of static filters. The filter on the upper left shows only specific Accounts, while the filter on the upper right has a range of Accounts. Both filters below show static combinations.

🖬 Edit Filter 🔀	Edit Filter
Definition	Definition
Eilter name: Account (Transfer In)	Eilter name: Account (Revenue and Transfer In)
Description: Equal to GL 6010 in USAS.	Description: Equal to GL 5000 and GL 6010 in USAS.
Data įtem: Account 💌 Edit Data Item	Data įtem: Account Edit Data Item
Cogdition: Is equal to	Cogdition: Is between
Value(s):	Value(s):
Enter value(s)	Specify 'From' and 'To' values separately
	From: Enter value(s)
'3924000' '3968000'	300000
'3972000' '3973000'	To: Enter value(s)
'3986000'	3393939
<u>A</u> dd ▼ <u>Update</u> ▼ ⊆ombinations ±	<u>A</u> dd ▼ Update ▼ ⊆ombinations ±
Filter combinations:	Filter combinations:
Account = ('3924000', '3968000', '3972000', '3973000', '3986000')	Account >= '3000000' AND Account <= '3999999'
	Dejete
AND OR NOT Group() Split 🔺 🔻	
Establish dependencies between prompts	Establish dependencies between prompts
⊕ Filter expression:	Filter expression:
Hide from user	Hide from user
OK Cancel <u>H</u> elp	OK Cancel Help
Edit Filter	Edit Filter
Edit Filter	Edit Filter
Edit Filter Definition Elter name: Revenues Description: Elter name(ac only Comptraline (2, 500) (Bevenue))	Edit Filter X Definition
Edit Filter Edit Filter Effention Elter name: Revenues Description: Filter provides only Comptroller GL 5000 (Revenue). Data Item: Edit Data Item: Edit Data Item:	Edit Filter X Definition
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Prompted Filters

A prompted filter allows you to create a filter which enables end users to specify filter values at run time. The user can either enter values, select from a static list of values or select from a dynamic list of values. With either method of prompting, a number of values can be specified from single values, multiple values or multiple ordered values.



The following example shows how the AY prompted filter was created. Begin by selecting New and naming the prompted filter. You can also edit, delete and Add Shared prompted filters from the Manage Prompts menu.

	Name	Туре	Description	<u>N</u> ew
7	Period Name	Text		
7	Fund	Text		Edit
- 🖓	Revenue Account	Text		Delete
- 🖓	Expenditure Account	Text		Delete
- 🖗	AY	Text		Add Shared
Q .	Appropriation	Text		
\sim	Comp Object (Revenue)	Text		
\sim	Comp Object (Expense)	Text		
	PCA	Text		
?	AFund	Text		
\sim	ORG	Text		
ciated filt	ers:			_
	Name		Description	
		AY		

Next, select the Prompt Type and Values tab and identify the following elements:

- Prompt type
- Method for populating the prompt
- Number of values
- List of values

Note: For this example we are using a static list that allows the user to select more than one AY.

Edit Prompt	🔀 🖬 Edit Prompt			
General Prompt Type and Values	General Prompt Type and Values	1		
Name:	Prompt type:			
AY	Text			•
Displayed text:	Method for populating prompt:	Number of values:		
Appropriation Year	User selects values from a static	ist Multiple values		
Description:	Minimum value count:	Maximum value cou	nt:	_
	1			
	Minimum length:	Maximum length:		
n moerromuser ing recursion to no invarionation ■ Read-only values	All possible values Missi	ng values		
	Unformatted Value	Formatted (Displayed) Value	Defaults	Add
	2007	(use unformatted value)		Get Values
	2008	(use unformatted value)		Delete
	2009	(use unformatted value)		Clear Defaults
	2010	(use unformatted value)		
	2011	(use unformatted value)		
	2012	(use unformatted value)		Move Down
	Allow user to specify addition	al (unformatted) values		
OK Cancel Hep		[ок	Cancel Help

After you complete the prompt setup process you must attach the prompt to a filter. Select Kee the New Filter and attach the created prompt (AY) to a filter.

Edit Filter	Edit Filter	Edit Filter
Definition	Definition	Definition
Elter name: AY	Elter name: AY	Elter name: AY
Description: AY	Description: AY	Description: AY
Data įtem: AY Edit Data Item	Data jtem: AV 💌 Edit Data Item	Data item: AY Edit Data Item
Cogdition: Is equal to	Cogdition: Is equal to	Cogdition: Is equal to
Value(s):	Value(s):	Value(s):
Prompt user for value(s)	Prompt user for value(s)	Prompt user for value(s)
Enter value(s)	SAY [AY]	RAY [AY] Fdt New Shared
Prompt user for value(s)	8Comp Object (Expense) Comp Object (Expent	
Derive identity values (for row-level permissions)	&Comp Object (Revenue) [Comp Object (Reve	
	8Appropriation [Appropriation]	
	8Expenditure Account [Expenditure Account]	
	8Revenue Account [Revenue Account]	
	8Fund [Fund]	
<u>A</u> dd ▼ Update ▼ Combinations ±	<u>A</u> dd ▼ <u>Update</u> ▼ ⊆ombinations ±	Add ▼ Update ▼ ⊆ombinistions ±
Filter combinations:	Filter combinations:	Filter combinations:
AY = (8AY [AY])	AY = (8AY [AY])	AY = (8AY [AY])
Delate	Defeta	Defete
AND OF NOT BACK() SHI: V	AN <u>D</u> 0 <u>6</u> N0 <u>I</u> <u>G</u> roup () 5 <u>5</u> <u>R</u> ▲ ▼	AND OF NOI Group() Set A A
Establish dependencies between prompts	Establish dependencies between prompts	Establish dependencies between prompts
Hiter expression:	Filter expression:	Filter expression:
Hide from user	Hide from user	Hide from user
OK Cancel Help	OK Cancel Help	OK Cancel Help

Test Queries

Running test queries on new information maps allows an information architect to verify that it works as intended. On the main window (below) select the Run a test query icon.



Using the Available items, select a few items to query and run the test. Try limiting the number of values or rows in order to minimize the time for the query results to be retrieved.

available items.	Selected items:			
Show all items	Item	Role Column Column	Properties Edit Edit	† +
Actual Flag Ethe Amount PCA Pcine Amount PCA Proiot Name Fund Appropriation	AY	Column	Edit	
End Item description:		<u>V</u> iew SQL		
utput options				
 Display aggregated values (group by category) 				

Resource Replacement/Moving/Saving Information Maps

An Information Map can reference many types of metadata often spanning several servers, tables and libraries. Over time, it may be necessary to modify an existing connection (i.e. OLEDB vs. ORACLE) or evening moving between a development, replicated, or production database.

The Resource Replacement option provides a way for an information architect to repair or update references to resources without having to re-create the Information Map.

SAS Information Map Studio: /Administrative Reso	urces/BISREP/05 - Stage/GL_Information Map *		_ @ X
<u>F</u> ile <u>E</u> dit <u>V</u> iew Insert <u>T</u> ools <u>H</u> elp			
🔁 🥔 🖬 🖴 🔍 🛩 🖻 🗶 🗡 🖆			
Pasources - Information Man Folders			
	Cesigii Keladonships		
	Selected Resources	Information Map Contents	
Holder Administrative Resources	Collense brary BISREP-APPS-01	Show all items	
BISPRO	ibrary BISREP-GL-01	GL_Information Map	~ 쯔
BRTSPro10	Find	Period Name	3
E GenDB20	Resource Replacement	🐑 Effective Date	5
🕀 🛄 IF-Gofish		E Bader ID	
URE Origo Star Data - LEORNING		TE Line Num	
Orientista bota contanta		TE Source Name	
Products		The state Name	
Grand Data		AY	
H- Shared Data		PCA	
		Comp Object	
		Comp Object Desc	
		Account	
		Account Desc	
		Project	
		Actual Flag	
		Period Name	
		Comp Object (Revenue)	
		Comp Object (Expense)	
		Comp Object (Transfer Out)	
		Account (Revenue)	-
		AFariac Afariac@Inud ~ Uda no. Alaiandrai	Inurlease tour state by up + 9541

In this example, an update is made to move the GL_Informaton Map from an OLEDB connection to an ORACLE connection.

Deselecting the Display only unresolved resources box (below) will show the Original Library and Replacement Library options. By choosing the Replacement library and selecting OK the process will be complete.

Libraries	The following tab	ie includes all of the libraries that are resources for the	information map. Select a replacement for each original library.	
Tables	Display only	ynresolved resources		
Columns		Original Library	Replacement Library	
	J			
		Original	Replacement	
	Location:			
	Description:			
	Libref:			
	Engine:			
	Engine:			

Libraries	The following ta	ble includes all of the libraries that are resi	ources for the informati	on map. Select a replacement for each original library.
Tables	🗖 Display only	unresolved resources		
Columns		Original Library		Replacement Library
	Library BISREP-	APPS-01	Library B	BISREP-APP5-01
	Library BISREP-	GL-01	Library	BISREP-GL-01
			Census	Target Library
			Develop	ment Source SAS Library
			Develop	ment Target Library
			Library 6	SISPRO-Consultant-01
			Library B	BISREP-AP-01
			Library 6	BISREP-APP5-01
			Library E	BISREP-APPS-02 (HR)
		Original		Replacement
	Location:			
	Description			
	Description.			
	Libref:	BISREP03		BISBEP03
		22310700		223127 00
	Engine:	OLEDB		OLEDB

As a final note, maintenance is often required in order for your Information Maps to be up-todate and working properly. It is important to receive constant feedback from end-users to determine if the specific map is accomplishing its goals. As reporting requirements change, so will your Information Maps. New data elements will need to be added, updates to static prompt lists, and even creating new logic short cuts and methods that will ease the effort required from your end-users.

Remember, Information Maps should serve to simplify the process of getting to the data for the end-user, not make it more complicated. When completed, Information Maps can serve your organization as a user-friendly road map to retrieve and analyze underlying data sources.

Appendix A:

General Ledger (GL_Information Map) Data Dictionary

<u>GL Information Map Tables</u>

APPS.FUND_USER APPS.GL_JE_CATEGORIES APPS.TPW_ACCOUNT_FLAT_TALBE GL.GL_CODE_COMBINATIONS GL.GL_JE_BATCHES GL.GL_JE_HEADERS GL.GL_JE_LINES GL.GL_JE_SOURCES_TL

GL Information Map Joins

(<<GL_JE_LINES.CODE_COMBINATION_ID>> =
<GL_CODE_COMBINATIONS.CODE_COMBINATION_ID>>)
(<<GL_JE_HEADERS.JE_HEADER_ID>> = <<GL_JE_LINES.JE_HEADER_ID>>)
(<<TPW_ACCOUNT_FLAT_TABLE.TPW_ACCOUNT>> =
<<GL_CODE_COMBINATIONS.SEGMENT5>>)
(<<GL_JE_CATEGORIES.JE_CATEGORY_NAME>> = <<GL_JE_HEADERS.JE_CATEGORY>>)
(<<GL_JE_SOURCES_TL.JE_SOURCE_NAME>> = <<GL_JE_HEADERS.JE_SOURCE>>)
(<<GL_JE_BATCHES.JE_BATCH_ID>> = <<GL_JE_HEADERS.JE_BATCH_ID>>)
(<<GL_JE_BATCHES.CREATED_BY>> = <<FND_USER.USER_ID>>)

GL Information Map Data Items

<<GL_JE_HEADERS.STATUS>> as Batch Status <<GL JE HEADERS.PERIOD NAME>> as Period Name <<GL JE LINES.EFFECTIVE DATE>> as Effective Date <<GL JE HEADERS.JE SOURCE>> as JE Source <<GL JE SOURCES TL.USER JE SOURCE NAME>> as JE Source Name <<GL_JE_BATCHES.NAME>> as Batch Name <<GL JE HEADERS.NAME>> as JE Header Name <<GL CODE COMBINATIONS.SEGMENT1>> as AY <<GL_CODE_COMBINATIONS.SEGMENT2>> as PCA <<GL_CODE_COMBINATIONS.SEGMENT3>> as Appropriation <<GL_CODE_COMBINATIONS.SEGMENT4>> as Fund <<TPW_ACCOUNT_FLAT_TABLE.COMP_OBJECT>> as Comp Object <<TPW_ACCOUNT_FLAT_TABLE.COMP_OBJECT_DESC>> as Comp Object Desc <<GL_CODE_COMBINATIONS.SEGMENT5>> as Account <<TPW_ACCOUNT_FLAT_TABLE.TPW_ACCOUNT_DESC>> as Account Desc <<GL_CODE_COMBINATIONS.SEGMENT6>> as ORG <<GL CODE COMBINATIONS.SEGMENT7>> as Project

<<GL_JE_LINES.DESCRIPTION>> as JE Line Desc <<GL_JE_HEADERS.DESCRIPTION>> as Description <<FND_USER.USER_NAME>> as User Name



GL Information Map (Filters)

- PCA
- Period Name
- Fund
- AY
- Appropriation
- Comp Object (Revenue)
- Comp Object (Expense)
- Comp Object (Transfer In)
- Comp Object (Transfer Out)
- Account (Revenue)
- Account (Expenditure)
- Account (Revenue and Transfer In)
- Account (Transfer In)
- Account (Expenditure and Transfer Out)
- Account (Transfer Out)



Map Location:



Map Designer:

Alejandro Farias Administrative Resources Division Phone 512.389.8154 Created February 15, 2011 4:29:42 PM CST