



SuiteAnalytics Workbook: Datasets and Visualizations

Course Description

Do you want to learn about NetSuite's latest data analytics tool, SuiteAnalytics Workbook?

This course will provide you with the knowledge and skills needed to create data queries that mine your NetSuite data for valuable business intelligence.

Through real-world use cases, hands-on exercises and best practices, you will learn how to create datasets, filter source data, and create workbook data visualizations that summarize, aggregate and visualize your data to highlight opportunities and gain powerful insights that drive the success of your business.

Who Should Attend

- NetSuite Administrator (functional or technical) responsible for the creation or management of workbooks.
- NetSuite power-user who wants to learn more about the unique capabilities of SuiteAnalytics Workbook beyond what is possible with standard saved searches and reports.
- NetSuite user with a foundational knowledge of data analytics.

Key Tasks

How do I:

- Create datasets containing fields from multiple record types using multi-level joins?
- Define dataset filter criteria with simple expressions and more complex filters using filter groups and AND/OR logic?
- Create workbook table views and pivot tables to summarize and aggregate my source data?
- Create charts to graphically represent my source data?
- Apply column-level filters, sorting options in pivot tables and charts, and apply advanced formatting to numeric fields?
- Create custom formula fields using NetSuite field IDs and SQL functions and incorporate them into dataset filter criteria and workbook visualizations?
- Share datasets and workbooks with other users and roles?
- Export workbook information and publish data visualizations to the Analytics portlet?

Prerequisites

To get the most out of this course, you should be able to navigate the NetSuite user interface and complete general administrative tasks.

Familiarity with creating ad-hoc queries and reports using standard NetSuite searches and reports is beneficial, but not required.

Topics

Workbook Overview: This module will provide you with an overview of SuiteAnalytics Workbook, which allows you to create highly customizable workbooks that combine queries and rich data visualizations in a single tool.

Building Datasets: In this module, we will introduce you to the Dataset Builder and the process of defining a workbook's "single source of truth". We will discuss the selection of the base record, defining source data and filter criteria, and applying advanced sorting options.

Workbook Data Visualizations: In this module, we will introduce you to the workbook data visualization types available that allow you to summarize, aggregate and graphically visualize your source data.

Working With Formulas: In this module, we will introduce you to formulas and show how they can be used to perform calculations and other data manipulation. We will also discuss how SQL functions can be used in formulas to enhance the data processing capabilities of your workbooks.

SuiteAnswers

Get answers to your support and training related questions:

- Go to Videos to find Getting Started tutorials.
- Go to Videos to watch New Feature Previews to learn about the latest NetSuite release.

Related Courses

Take these courses for more training:

- NetSuite: Financial Management
- SuiteAnalytics: Financial Reports and Searches

Sharing and Exporting Workbooks: In this module, we will examine some of the ways workbook data can be shared, exported and published to the Analytics portlet on user dashboards.

Auditing Workbook Usage: In this module, you will learn how to track workbook changes and monitor workbook usage by creating workbooks on the Audit Trail and Execution Log records.

Building a Library of Workbooks: In this module, you will apply the knowledge and skills learned in this course to create datasets and workbooks on a variety of NetSuite record types, which can then be used as templates for the creation of additional workbooks.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.