



# SUITEANALYTICS WORKBOOK: QUERIES, PIVOTS AND CHARTS

## 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 query and filter data, create pivot tables, and generate charts to highlight opportunities that drive the success of your business.

## Who Should Attend

This course is right for you if you are a:

- NetSuite Administrator (functional and technical) responsible for the creation or management of user 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:

- Determine when to use SuiteAnalytics Workbook over the standard NetSuite search and reporting tools?
- Query and filter data across multiple records using multi-level joins?
- Create filter criteria with simple expressions as well as more complex filters using filter groups and AND/OR logic?
- Establish one or more pivot tables with multiple rows and/or columns, subtotals and grand totals?
- Format data in my pivot tables and apply summary types, such as Sum, Average, Median, Count, Min and Max?
- Visualize my data by creating one or more charts based on defined data and criteria?
- Create custom formula fields using SQL functions and incorporate them into criteria, pivot tables and charts?
- Publish workbook pivot tables and charts to user dashboards using 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, pivot tables and charts—all within a single tool.

**Workbook Queries:** In this module, we will introduce you to the Analytics Dashboard and discuss the process of selecting the workbook's source record, selecting source data, and filtering and sorting the source data.

**Pivot Tables:** In this module, we will discuss pivot tables and how they can be used to aggregate and summarize your workbook source data.

**Charts and Graphs:** In this module, we will discuss how you can visualize your workbook's source data using charts and graphs.

**Publishing Workbooks:** In this module, we will examine some of the ways workbook data can be published to other users in NetSuite.

**Working with Formulas:** In this module, we will introduce you to formulas and show how they can be used to perform calculations and

## SuiteAnswers

Get answers to your support and training related questions:

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

## Live Training Webinars

Participate in free webinars to get practical tips and tricks for using NetSuite better:

- Go to [suitetraining.com](https://suitetraining.com) > Webinars and Events to view the schedule and register for an event.

## Related Courses

Take these courses for more training:

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

other data manipulation. We will also discuss how SQL functions can be used in formulas to enhance the data processing capabilities of your workbooks.

**Auditing Workbook Usage:** In this module, you will learn how to monitor workbook usage by creating workbooks on the Audit Trail and Execution Log records. These records can be used to view the types of data being accessed through SuiteAnalytics Workbook and to track changes users make to 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.

