



Dataset & Workbook

Get better insights with Analytics

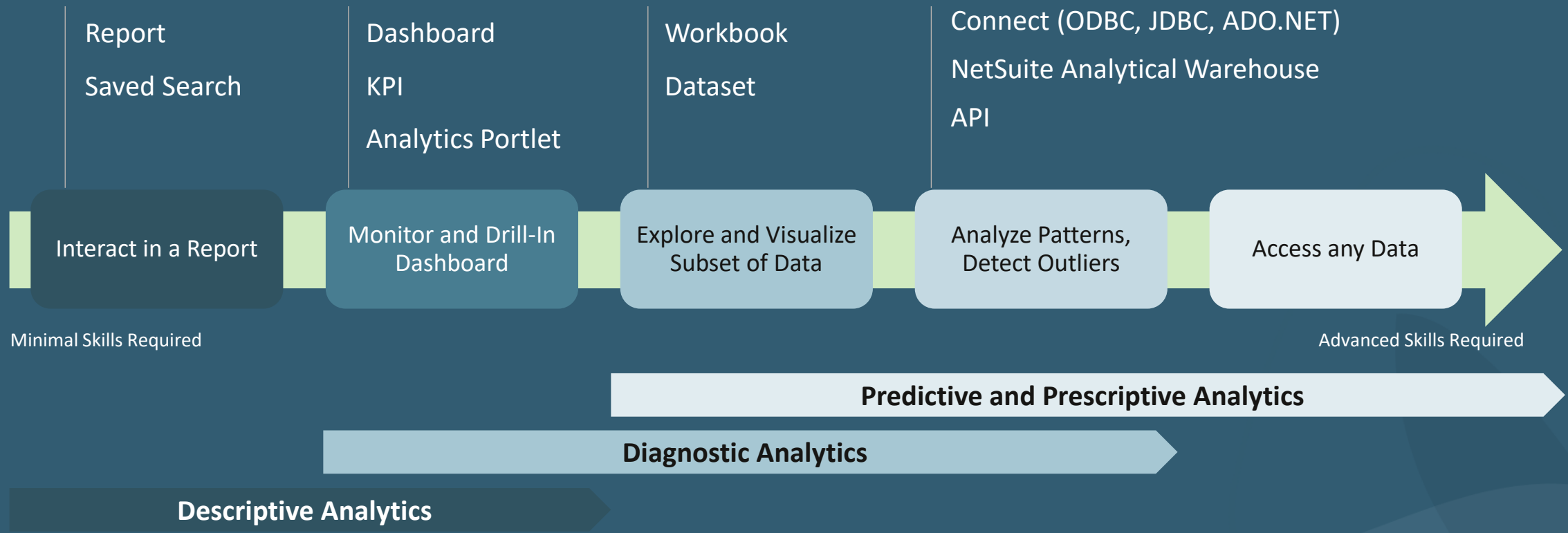
Julien Le Bars

Senior product manager
01/24/2024

Agenda

1. SuiteAnalytics spectrum
2. Workbook & dataset suite spot
3. Dataset and Workbook overview
4. Focus on dataset
5. Focus on workbook

Analytics spectrum



Source: Gartner



Dataset & Workbook

Dataset

- Query NS data over new unified data model
- Multi-level joins
- Criteria builder
- Powerful formula builder
- Single source of truth
- Caching

Workbook

- Summarize, slice and dice data
- Table, pivot and chart view
- Link datasets
- Save, share & export
- Add views on dashboard

The image displays two screenshots of the NetSuite Analytics interface. The top screenshot shows the 'Sales Dataset' configuration page. It features a search bar, a list of fields (Amount (Net), Class, Customer, Date, Item, Quantity, Sales Rep, Transaction, Transaction Type, Account), and a table of data with columns: DATE, TRANSACTION, CUSTOMER, TRANSACTION TYPE, and ITEM. The bottom screenshot shows the 'Sales Workbook' interface. It includes a navigation bar with tabs for 'Sales by Customer', 'Sales by Item', 'Sales by Sales Rep', 'Inventory', 'Sales vs Actual', and 'Tab 4'. A 'DATASET' sidebar on the left lists 'Sales Dataset', 'Item Dataset', and 'Warehouse Inventor...'. The main area prompts the user to 'Choose visualization type for current dataset' with options for 'Table', 'Pivot', and 'Chart'. Below this, it states 'You can use more datasets in your workbook' and provides a 'Connect Dataset' button.

Embeds real-time analytical capabilities

- Complements saved searches & reports
- Unified data model
- Access, join, compare & visualize your data
- Slice and dice data to gain deeper insights
- Centralize & maintain analytics across the organization

Suite spot

- Enhanced usability
- Improved visualization with pivot charts/graphs
- Multi-level table joins across data model
- Link datasets
- Single source of truth
- Dataset caching for faster result

Advantages over Reports & Saved Searches



Focus on Dataset

Root record selection

New Dataset [Learn about Analytics](#)

Select a root record type with the fields you want to include in your dataset.

Cancel

Search record types Showing 561 Record Types

RECORD TYPE	RECORD CATEGORY	RECORD ID
1099-MISC Category	Standard	category1099misc
AA Restrictions Record	Standard	RstrRecord
Account	Standard	Account
Accounting Context	Standard	AccountingContext
Accounting Period	Standard	accountingPeriod
Accounting period child record	Standard	AccountingPeriodChildRecord
Accounting period parent record	Standard	AccountingPeriodParentRecord
Activity	Standard	Activity
AdditionalConditionRecord	Standard	AdditionalConditionRecord
Address Book	Standard	AddressBook
Aggregated Record	Standard	usrVisibilityAggregatedRecord
Algorithm	Standard	RecSysAlgorithm
Allocation Schedule	Standard	GeneralAllocationSchedule
All Parser Plug-in	Standard	AllParserPlugin
Analytical Record	Analytical	usrVisibilityAnalyticalRecord
AnotherHierarchyRecord	Standard	AnotherHierarchyRecord
Audit Trail	Standard	UsrAuditLog
Audit Trail	Standard	UsrDsAuditLog
Automated Clearing House	Standard	AutomatedClearingHouse
Boolean Record	Standard	BooleanRecord
Branch Record	Standard	BranchRecord
Budget	Standard	budgets
Budget Import	Standard	budgetimport

Dataset layout

Search by name or ID

- Formulas
 - Sales (Invoiced) 9
 - Account
 - Class
 - Customer
 - Department
 - Item
 - Partner
 - Posting Period
 - Sales Rep
 - Transaction
 - Transaction Line
- Amount (Net) #
 - Class
 - Customer
 - Date
 - Item
 - Quantity #
 - Sales Rep T
 - Transaction
 - Transaction Type T
 - Account T
 - Amount #
 - Department
 - Memo T
 - Partner
 - Posting Period T
 - Transaction Line #

Criteria summary Show details

Sales Rep

Sales Rep any of Clark Koozer, Krista Barton, Mark Grogan, Neil Thomson, Sam R Cruz

Drop fields here to add criteria.

Add New Group of Criteria

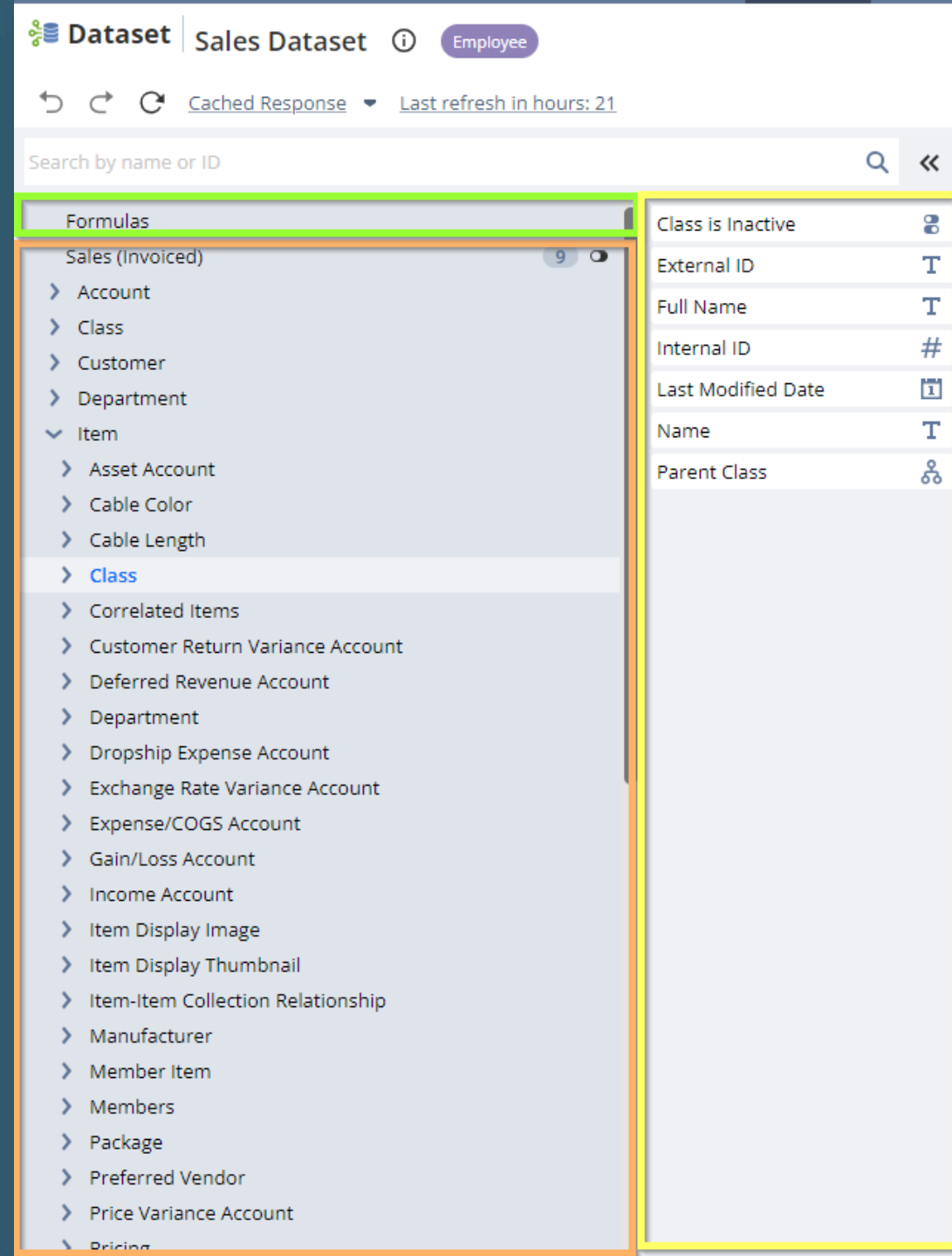
Reset Criteria

DATE	TRANSACTION	CUSTOMER	TRANSACTION TYPE	ITEM	AMOUNT (NET)	QUANTITY
10/6/2006	Invoice #3090613	Boise Publishing Co.	Invoice	Vok 700 Cellular Phone	\$109.00	
9/19/2006	Invoice #308196	Herline Hospital Holding C...	Invoice	HP L1925 (19")	\$5,560.00	
10/10/2006	Invoice #3091011	Malena Construction Fabri...	Invoice	HP xw4100	\$18,392.00	
10/2/2006	Invoice #309026	Bakkala Catering Distributo...	Invoice	Cable - Parallel	\$54.75	
10/6/2006	Invoice #3090611	Deblasio Painting Holding ...	Invoice	Warranty 1 yr \$1500+	\$349.65	
9/28/2006	Invoice #308288	Steinberg Electric Networki...	Invoice	Ultragear Desktop Sp...	\$19.95	
9/3/2006	Invoice #308038	Bartkus Automotive Comp...	Invoice	Creativo 2400 mother...	\$2,691.00	
10/7/2006	Invoice #3090713	Leigland _ Fabricators	Invoice	HP L1925 (19")	\$3,475.00	
10/9/2006	Invoice #3090910	Taverna Liquors Networking	Invoice	Ultragear Desktop Sp...	\$279.30	
10/10/2006	Invoice #309103	Mcguff and Spriggins Hospi...	Invoice	Cable - Cat 5, 5 ft	\$48.65	
10/10/2006	Invoice #309103	Mcguff and Spriggins Hospi...	Invoice	HP Compaq nx9010	\$1,998.00	
9/24/2006	Invoice #308248	Ras Windows -	Invoice	DVD-R	\$19.80	
5/4/2006	Invoice #3080412	Thongchanh Telecom Rent...	Invoice	HP xw3100	\$47,984.00	
9/10/2006	Invoice #308109	Quezad Lumber Leasing	Invoice	HP xw4100	\$6,897.00	
8/15/2006	Invoice #1027	B-Sharp Music	Invoice	HP xw3100	\$5,398.20	
9/2/2006	Invoice #3080213	Brea Painting Company	Invoice	Crusher Game Pad	\$181.30	
9/8/2006	Invoice #308089	Gerba Construction Corpor...	Invoice	HP xw4100	\$13,794.00	
11/11/2006	Invoice #309118	Calaber Plumbing Sales	Invoice	Crusher Game Pad	\$64.75	

Available field list (AFL)

3 main sections:

- Formula builder (green)
- Root record and all records joined to it (orange)
- Field list for selected record (yellow)



The screenshot displays the Dataset interface for a Sales Dataset. The top navigation bar includes the Dataset logo, the name 'Sales Dataset', and a user profile 'Employee'. Below the navigation bar, there are refresh and cache controls, with a 'Cached Response' dropdown and a 'Last refresh in hours: 21' indicator. A search bar is present with the text 'Search by name or ID'. The main content area is divided into three sections:

- Formulas (Green):** A section at the top of the main content area, currently empty.
- Root record and all records joined to it (Orange):** A tree view showing the hierarchy of records. The root record is 'Sales (Invoiced)' with a count of 9. It is expanded to show a list of related records, including 'Account', 'Class', 'Customer', 'Department', 'Item', 'Asset Account', 'Cable Color', 'Cable Length', 'Class', 'Correlated Items', 'Customer Return Variance Account', 'Deferred Revenue Account', 'Department', 'Dropship Expense Account', 'Exchange Rate Variance Account', 'Expense/COGS Account', 'Gain/Loss Account', 'Income Account', 'Item Display Image', 'Item Display Thumbnail', 'Item-Item Collection Relationship', 'Manufacturer', 'Member Item', 'Members', 'Package', 'Preferred Vendor', 'Price Variance Account', and 'Pricing'.
- Field list for selected record (Yellow):** A list of fields for the selected 'Class' record. The fields are: 'Class is Inactive', 'External ID', 'Full Name', 'Internal ID', 'Last Modified Date', 'Name', and 'Parent Class'. Each field has a corresponding icon indicating its type or format.

Formula builder

- Create custom formula fields
- Validation and error detection 😊
- Add to dataset, use it as a criteria
- It can be used in workbook visualization too

The screenshot shows the Oracle Formula Field builder interface. At the top, there's a title bar "Formula Field" with a close button. Below it, the "FORMULA FIELD NAME*" is "Which month is it?" and the "CHOOSE OUTPUT TYPE*" is "STRING". The "FORMULA*" area contains a SQL CASE statement:

```
1 CASE EXTRACT(Month FROM CURRENT_DATE)
2 WHEN 1 THEN 'January'
3 WHEN 12
4 THEN 'December'
5 ELSE 'Casual month of a year'
6 END
```

Below the formula area, there's a link "Need help with defining the formula?" and a "Validate" button. At the bottom, there are "Fields" and "Functions" tabs. The "Functions" tab is active, showing a search bar and a list of functions including ASIN, ATAN, ATAN2, BITAND, CASE, CAST_TO_DATE, CEIL, CHARTOROWID, CHR, COALESCE, and COMPOSE. The "CASE" function is highlighted. To the right of the function list, there's a detailed description of the CASE function, including an example and a link to "Add the example to the formula". At the bottom, there are "Save" and "Cancel" buttons.

Criteria builder

- Filter out fields & records from the dataset
- AND/OR logic
- Can be grouped in multiple filter conditions

Criteria summary [Show details](#)

Sales Rep • AND • Class • AND • (Amount (Net) • OR • Item)

Sales Rep any of Clark Koozer, Krista Barton, Mark Grogan, Neil Thomson, Sam R Cruz

Class is New Customer

Amount (Net) (not consolidated) greater 1,000.00

Item any of HP 1000 Laser Printer, HP 1100 Laser Printer

Drop fields here to add criteria.

Add New Group of Criteria

Drop fields here to add criteria.

Add New Group of Criteria

Reset Criteria

Data table

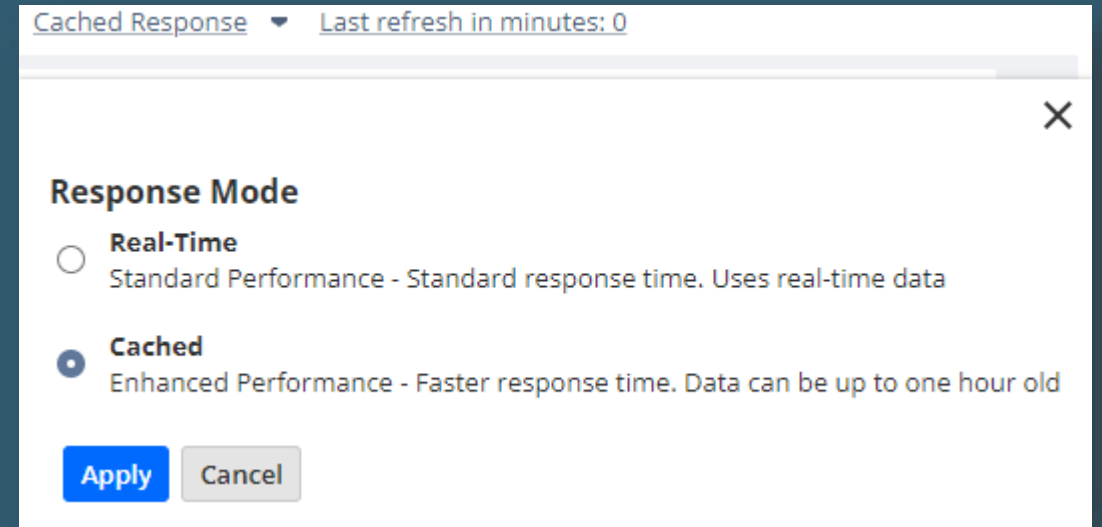
- Lists fields and records that can be used in workbook views
- Row counter
- Column summary
- Pagination

DATE	TRANSACTION	CUSTOMER	TRANSACTION TYPE	ITEM	AMOUNT (NET)	QUANTITY	SALES REP
10/6/2006	Invoice #3090613	Boise Publishing Co.	Invoice	Vok 700 Cellular F	\$109.00	1	Sam R Cruz
9/19/2006	Invoice #308196	Herline Hospital Holding C...	Invoice	HP L1925 (19")	\$5,560.00	8	Mark Grogan
10/10/2006	Invoice #3091011	Malena Construction Fabri...	Invoice	HP xw4100	\$18,392.00	8	Neil Thomson
10/2/2006	Invoice #309026	Bakkala Catering Distributo...	Invoice	Cable - Parallel	\$54.75	5	Mark Grogan
10/6/2006	Invoice #3090611	Deblasio Painting Holding ...	Invoice	Warranty 1 yr \$15	\$349.65	7	Krista Barton
9/28/2006	Invoice #308288	Steinberg Electric Networki...	Invoice	Ultragear Desktop	\$19.95	1	Clark Koozer
9/3/2006	Invoice #308038	Bartkus Automotive Comp...	Invoice	Creativo 2400 mo	\$2,691.00	9	Sam R Cruz
10/7/2006	Invoice #3090713	Leigland _ Fabricators	Invoice	HP L1925 (19")	\$3,475.00	5	Neil Thomson
10/9/2006	Invoice #3090910	Taverna Liquors Networking	Invoice	Ultragear Desktop	\$279.30	14	Mark Grogan
10/10/2006	Invoice #309103	Mcguff and Spriggins Hospi...	Invoice	Cable - Cat 5, 5 ft	\$48.65	7	Krista Barton
10/10/2006	Invoice #309103	Mcguff and Spriggins Hospi...	Invoice	HP Compaq nx90	\$1,998.00	2	Krista Barton
9/24/2006	Invoice #308248	Ras Windows -	Invoice	DVD-R	\$19.80	4	Neil Thomson
5/4/2006	Invoice #3080412	Thongchanh Telecom Rent...	Invoice	HP xw3100	\$47,984.00	16	Mark Grogan
9/10/2006	Invoice #308109	Quezad Lumber Leasing	Invoice	HP xw4100	\$6,897.00	3	Sam R Cruz
8/15/2006	Invoice #1027	B-Sharp Music	Invoice	HP xw3100	\$5,398.20	2	Krista Barton
9/2/2006	Invoice #3080213	Brea Painting Company	Invoice	Crusher Game Pad	\$181.30	14	Krista Barton
9/8/2006	Invoice #308089	Gerba Construction Corpor...	Invoice	HP xw4100	\$13,794.00	6	Clark Koozer

- Sort Ascending
- Sort Descending
- Add Sort
- Show Location in Field List
- ← Move Left
- Move Right
- ⇐ Make First Column
- ⇒ Make Last Column
- Rename
- Remove Column
- Remove All Columns

Caching

- Caching feature needs to be enabled in the account first
- Cache large dataset to improve performance
- Response mode can be changed on the fly



Saving & Sharing

- Save dataset with custom name and description
- Share data with roles and/or employees
- Respect global permission and restrictions

The image shows two overlapping dialog boxes from a software application. The top dialog, titled "Save Dataset As:", has a text input field containing "Sales Dataset" and a larger text area with the description "Sales dataset filtered by sales rep. It contains only Invoice and cash sales transactions." Below the text area are "Save" and "Cancel" buttons. The bottom dialog, titled "Share dataset", prompts the user to "Select individuals or groups with whom you want to share Sales Dataset". It features a "Share with all" checkbox, a list of roles and employees, and a search bar. The list includes "A/R Clerk", "Accountant", "Accountant (Reviewer)", "Administrator", "Advanced Partner Center", "Bookkeeper", "Buyer", and "CFO". A "No items selected" message is visible in the right-hand pane. "Share" and "Cancel" buttons are at the bottom.

Miscellaneous

- Undo/redo
- Refresh button
- Export data to .CVS
- Export SuiteQL query to .TXT



Live demo

Workbook layout

ORACLE NETSUITE

Search



Help

Feedback

A Wolfe-admin
Wolfe Electronics - Administrator



Activities

Transactions

Lists

Reports

Analytics

Documents

Setup

Customization

Commerce

SuiteApps

Support

Sales Tools

Knowledge Base

Workbook | Sales (Invoiced) Workbook ⓘ

[Learn about Analytics](#)

↶ ↷ ↻ Cached Response ▾

Export to SDF Share Save... ▾

Tab 1 ⋮ +

DATASET <<

Sales Dataset ⋮

+ Connect Dataset

Sales Dataset

Amount (Net) #

Customer

Date

Item

Quantity #

Sales Rep T

Transaction T

Transaction Type T

Choose visualization type for current dataset



Table



Pivot



Chart

You can use more datasets in your workbook

Connect Dataset

Table view

Workbook | Sales (Invoiced) Workbook ⓘ

[Learn about Analytics](#)

↶ ↷ ↻ [Cached Response](#) ▾ [Last refresh in hours: 1](#)

[Export to SDF](#) [Share](#) [Save](#) ▾

[List of transaction](#) ⋮ +

DATASET <<

[Sales Dataset](#) ⋮

Sales Dataset

[Amount \(Net\)](#) #

[Customer](#) ⋮ ⋮

[Date](#) 📅

[Item](#) ⋮ ⋮

[Quantity](#) #

[Sales Rep](#) T

[Transaction](#) ⋮ T

[Transaction Type](#) T

1 filter applied [Remove all](#)
(Amount (Net) greater 1,000.00)

DATE	TRANSACTION	AMOUNT (NET)
9/24/2006	Invoice #308247	\$113,981.00
10/12/2006	Invoice #309129	\$77,987.00
11/14/2006	Cash Sale #1284	\$74,975.00
6/1/2006	Invoice #3080112	\$65,989.00
11/5/2006	Invoice #3090510	\$65,989.00
9/28/2006	Invoice #308284	\$61,351.00
11/3/2006	Invoice #3090316	\$59,990.00
10/6/2006	Invoice #3090613	\$56,981.00
11/1/2006	Invoice #3090115	\$51,664.00
10/2/2006	Invoice #3090210	\$51,664.00
10/6/2006	Invoice #3090610	\$51,664.00
9/17/2006	Invoice #308177	\$50,983.00
7/1/2006	Invoice #308019	\$48,435.00
11/5/2006	Invoice #3090511	\$48,435.00
5/4/2006	Invoice #3080412	\$47,984.00
9/16/2006	Invoice #308167	\$43,681.00
9/26/2006	Invoice #308268	\$41,977.00

Sum: USD 3,064,018.93 Average: USD 9,789.20 Count: 313 Min: USD 1,019.15 Max: USD 113,981.00

Pivot view

DATASET <<

Sales Dataset

Sales Dataset

- Amount (Net) #
- Customer
- Date
- Item
- Quantity #
- Sales Rep T
- Transaction T
- Transaction Type T

LAYOUT <<

Rows

Customer

Item

Date

Columns

Drop fields

Measures

Amount (Net) (Sum)

Create Calculated Measure

Customer	Item	Date	Amount (Net) (Sum)
> Carpinteria Leasin...			\$21,611.65
> Sax Lumber Co.			\$57,792.45
▼ Austin Builders Dist...	▼ DVD-R	10/11/2006	\$19.80
	▼ EZ CD-RW Drive	10/11/2006	\$2,859.35
	Total Austin Builders Distributors		\$2,879.15
▼ Lake Worth Markets...	▼ Cable - Parallel	10/12/2006	\$87.60
	▼ USB Hub - 4 port w/...	10/12/2006	\$195.65
	▼ DVD-R	10/12/2006	\$29.70
	▼ Standard USB Mouse	10/12/2006	\$179.10
	Total Lake Worth Markets Fabricators		\$492.05
▼ Jennings Financial	▼ HP Compaq d330	3/19/2005	\$11,691.00
	▼ HP 1000 Laser Printer	3/19/2005	\$1,079.88
	▼ Creativo 2400 moth...	10/22/2006	\$201.82
	▼ Warranty 3 yr \$500-...	3/19/2005	\$899.50
	▼ S Wrnty 3/1500-2999	10/22/2006	\$405.00
	▼ Cable - Serial, 10 ft	3/19/2005	\$26.88
	▼ Warranty 3 yr \$1500+	3/19/2005	\$116.96
	▼ Laserscan 2100	3/19/2005	\$269.96
	▼ HP xw3100	3/19/2005	\$2,699.10
	▼ 25%	10/22/2006	\$0.00
	Total Jennings Financial		\$17,390.10

Calculated measure

Calculated Measure | Sales by item Cancel Apply


Dataset

Sales Dataset



Amount (Net)	#
Customer	⌵ ⌶ ⌷
Date	📅
Item	⌵ ⌶ ⌷
Quantity	#
Sales Rep	T
Transaction	⌵ ⌶ T
Transaction Type	T

NAME*

DEFINITION*

- Type or drag a field.
- Click  to change the aggregate function.
- Type a basic operator such as *, /, +, - or ().
- Press + to display all options.

Example:

 / 

Example

DATASET

- Quota
- Sales Dataset

Quota

- Date
- Internal ID
- Quota \$ Amount
- Sales Rep
- Year

LAYOUT

Rows

Sales Rep

Columns

Drop fields

Measures

- Sales \$ Amount (Sum)
- Quota \$ Amount (Sum)
- \$ Difference
- % Difference

Create Calculated Measure

Sales Rep	Sales \$ Amount (Su...)	Quota \$ Amount (S...)	\$ Difference	% Difference
Sam R Cruz	\$491.15k	\$500.00k	-\$8.85k	-1.80 %
Neil Thomson	\$639.68k	\$600.00k	\$39.68k	6.20 %
Clark Koozer	\$653.55k	\$650.00k	\$3.55k	0.54 %
Krista Barton	\$696.25k	\$650.00k	\$46.25k	6.64 %
Mark Grogan	\$720.03k	\$720.00k	\$0.03k	0.00 %
Grand Total	\$3,200.66k	\$3,120.00k	\$80.66k	2.52 %

Chart view

DATASET

LAYOUT PROPERTIES

- Sales Dataset
- Class
- Customer
- Date
- Item
- Quantity
- Sales \$ Amount
- Sales Rep
- Transaction
- Transaction Type

- Column Chart
- X-Axis
 - Date (Year)
 - Date (Quarter)
- Series
- Sales Rep
- Measures
- Sales \$ Amount (Sum)
- Create Calculated Measure

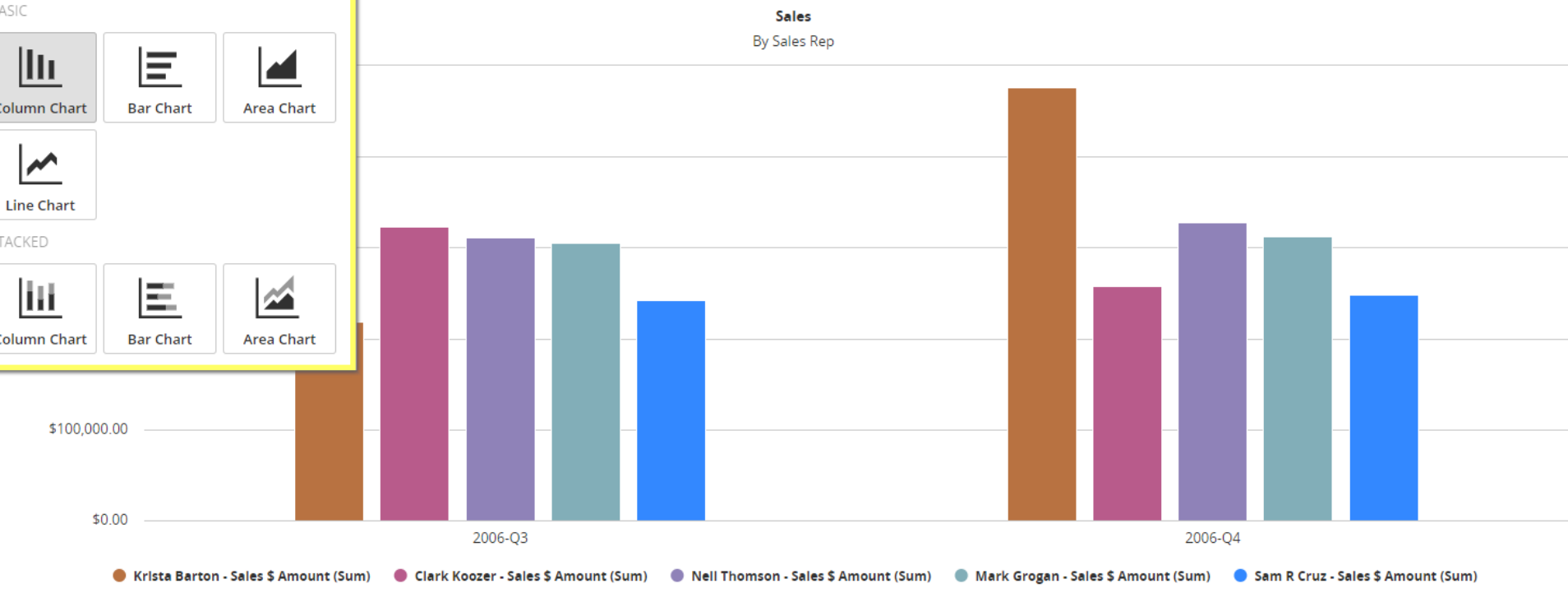
2 filters applied Remove all
Date (Quarter) any of 3, 4 AND Date (Year) any of 2006

BASIC

- Column Chart
- Bar Chart
- Area Chart
- Line Chart

STACKED

- Column Chart
- Bar Chart
- Area Chart





Live demo

Analytics home

ORACLE NETSUITE

Search



Help

Feedback



Julien Le Bars
Wolfe Electronics - Administrator

- Activities
- Transactions
- Lists
- Reports
- Analytics**
- Documents
- Setup
- Customization
- Commerce
- SuiteApps
- Support
- Sales Tools
- Knowledge Base

My favorite workbooks

Name [Learn about Analytics](#)

Purchasing Workbook

Lists details of all purchase orders completed, including associated vendor bills, item receipts, and items.

Employee

Shared with me



Sales Workbook

Single source of truth sales workbook with data broken down by various dimensions

Employee

Shared with me



Workbooks Datasets

Search



All Workbooks

Showing 48 Workbooks



New Workbook

	WORKBOOK NAME	DETAILS	DESCRIPTION	SCRIPT ID	OWNER	LAST OPENED	LAST MODIFIED	ACTIONS
☆	Sales by Customer	Details		10	Julien Le Bars	2023-09-19 13:34:25	2023-09-19 13:00:00	⋮
☆	Sales by sales rep	Details		11	Julien Le Bars	2023-09-19 13:00:38	2023-09-19 13:00:37	⋮
★	Sales Workbook	Details	Single source of truth sales workbook with data broken dow...	9	Julien Le Bars	2024-01-19 13:20:15	2024-01-19 13:20:10	⋮
☆	System Notes v2	Details		SystemNotes2Workbook	System			⋮
☆	Test Analytics Workbook API 14	Details	Test Analytics Workbook API 14 - table view (SearchUriTestS...	AnalyticWorkbookAPITestRecord14	System			⋮
☆	Test DLink Transaction Customer Multiple Links	Details	DataSetLinks A.Amount(Credit)-B.Amount(Credit),A.Amount(...	DSLinkWorkbookTransactionCustomerMultipleLinks	System			⋮
☆	Test DLink Transaction Transaction Multiple Links	Details	DataSetLinks A.Amount(Credit)-B.Amount(Credit),A.Amount(...	DSLinkWorkbookTransactionTransactionMultipleLinks	System			⋮
☆	Test Pagination Data Type Record	Details	Test Pagination Data Type Record	PaginationDataTypeWorkbook	System			⋮
☆	Test Workbook USRSaveModelPerformanceTestRecord	Details	Test Performance Record	USRSaveModelPerformanceTestRecord	System			⋮
☆	Time - Actual	Details	Displays Time by Customer and Time by Item reports to de...	TimeTracking	System			⋮
☆	Transaction Detail	Details		TransactionDetailWorkbook	System	2023-09-11 06:23:59		⋮
☆	Warehouse Inventory: Inbound	Details	Displays inbound inventory transactions for receiving. Includ...	InventoryInboundWorkbookImpl	System			⋮
☆	Warehouse Inventory: Outbound	Details	Displays outbound transactions for fulfillment. Includes Sale...	InventoryOutboundWorkbookImpl	System	2023-09-11 06:24:32		⋮
☆	Web Store Orders	Details	Displays items ordered through the web store	WebStoreOrders	System			⋮

Dataset cache management

- Monitor cached datasets usage on the account (Admin only)
- Disable unused cached datasets (It **DOES NOT** delete the dataset)

Workbooks Datasets

Dataset Cache Management

About this feature

Close Apply

DATASET NAME USER STATUS

All All

DATASET NAME	WORKBOOK NAME	USER	LAST REFRESH COMPLETED	STATUS	LAST USED	USED IN 30 DAYS	CACHED RESPONSE
Transaction Test		A Wolfe-ad...	1/18/2024	Active	1/19/2024	✓	Disable
Sales Dataset	Sales Workbook	A Wolfe-ad...	10:33 am	Active	1/19/2024	✓	Disable
Quota Dataset	Sales Workbook	A Wolfe-ad...	1/18/2024	Active	1/19/2024	✓	Disable
Item Dataset		A Wolfe-ad...	1/18/2024	Active	1/19/2024	✓	Disable
Customer Dataset		A Wolfe-ad...	1/18/2024	Active	1/19/2024	✓	Disable

Analytics portlet

- Add up to 10 workbook views to dashboard
- Customize # row to show in portlet (pivot/table)
- Customize the height of the portlet (chart)
- Support for sorting & filtering
- Refresh data & maximize view mode
- Drill down to forms
- Open associating workbook

The screenshot shows the Oracle NetSuite interface. The top navigation bar includes 'ORACLE NETSUITE', a search bar, and user information for Julien Le Bars (Wolfe Electronics - Administrator). The main navigation menu includes 'Activities', 'Transactions', 'Lists', 'Reports', 'Analytics', 'Documents', 'Setup', 'Customization', 'Commerce', 'SuiteApps', and 'Support'. The 'Home' section is active, displaying 'Reminders', 'Shortcuts', and 'Recent Records'. The 'Sales vs Quota' portlet is highlighted with a yellow border and contains a table with the following data:

Sales Rep	Sales \$ Amount (Su...	Quota \$ Amount (S...	\$ Difference		
Sam R Cruz	\$491.15k	\$500.00k	-\$8.85k	↓	-1.80 %
Neil Thomson	\$639.68k	\$600.00k	\$39.68k	↑	6.20 %
Clark Koozer	\$653.55k	\$650.00k	\$3.55k		0.54 %
Krista Barton	\$696.25k	\$650.00k	\$46.25k	↑	6.64 %
Mark Grogan	\$720.03k	\$720.00k	\$0.03k		0.00 %
Grand Total	\$3,200.66k	\$3,120.00k	\$80.66k		2.52 %

A context menu is open over the 'Grand Total' row, showing options: 'Set Up', 'Open in Workbook', and 'Remove'.



Live demo

Q&A



Thank you

