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Saved Searches

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Agenda

Getting Started

- What are saved searches and how are they different from reports?
- Where can you use searches?
- Limitations
- How to choose the right starting point when creating a new search
- Transaction table and types
- Search components - understanding the checkboxes and all the tabs
- Useful tips and best practices when creating saved searches
- Retrieve related record information - joins, self-joins, transaction links
    - Applying Vs. Applied to transactions
- Summary searches and drill-down

New to Saved Searches?

What are saved searches?

- Search definition that you and other users can run repeatedly for dynamically updated results.
- **Automatic, customizable emails of saved search results.** You can designate saved search results to be emailed to users at regularly scheduled intervals and/or when results change.
- **Display of saved search results in dashboard portlets.** Define saved searches as custom key performance indicators so that summary values are available for display in Key Performance Indicators, KPI Scorecard, KPI Meter, and trend graph portlets. You also can display saved search results columns in custom search portlets.

When to use

Searches

- Data query for day to day tasks
- KPIs, dashboard lists and reminders
- Email alerts
- SuiteScript and Workflow

Reports

- Formatted ad-hoc report
- Financial reporting

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Known limitations

- No expand, collapse formatting
- Can only join one table level
- Conditional highlighting does not export
- Cannot merge two search result sets together
- Pivot tables are being replaced in 2017 Release 1
- Limited to seven columns on a dashboard view

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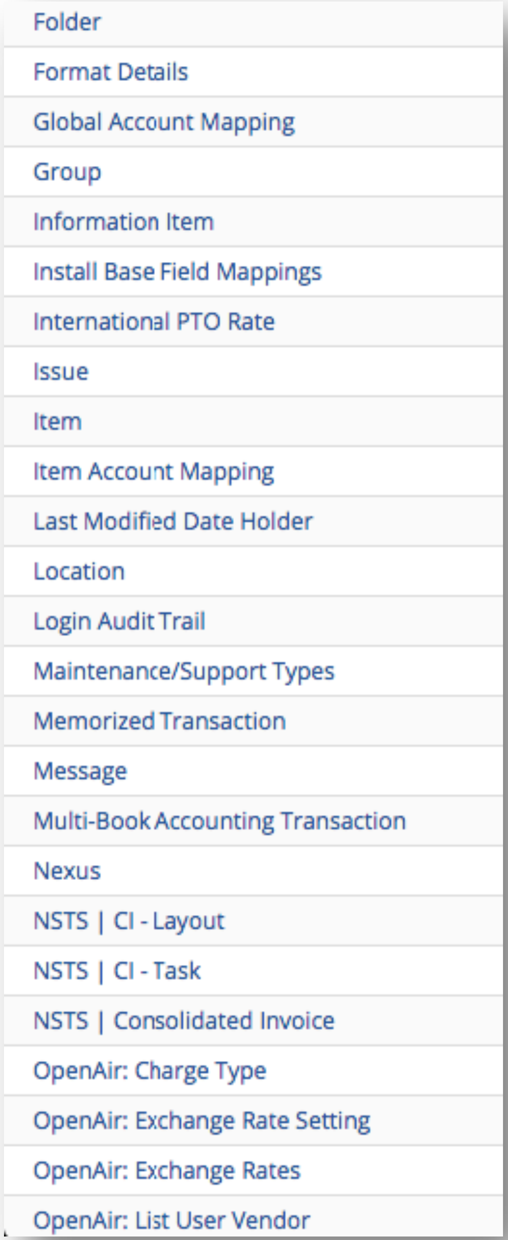
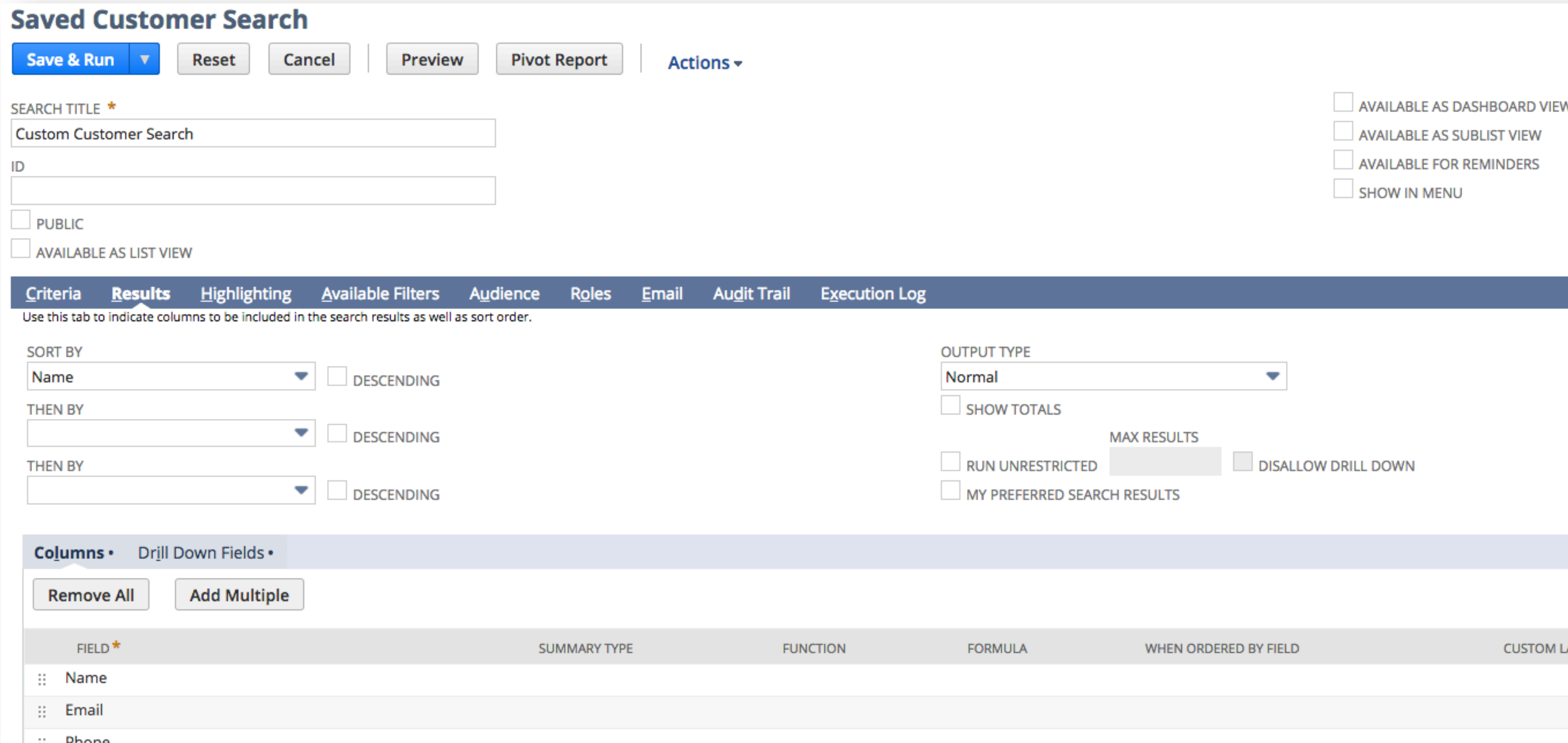
Getting started, and table structure

- Select a record type as the basis of your search
- You are able to create searches for any type of record that you have access to
- First navigate to **Reports>Saved Searches> New or Lists>Searches>Saved Searches>New**
- Select a record type to search. This is very important depending on the data that you are trying to view
- This will open the search builder

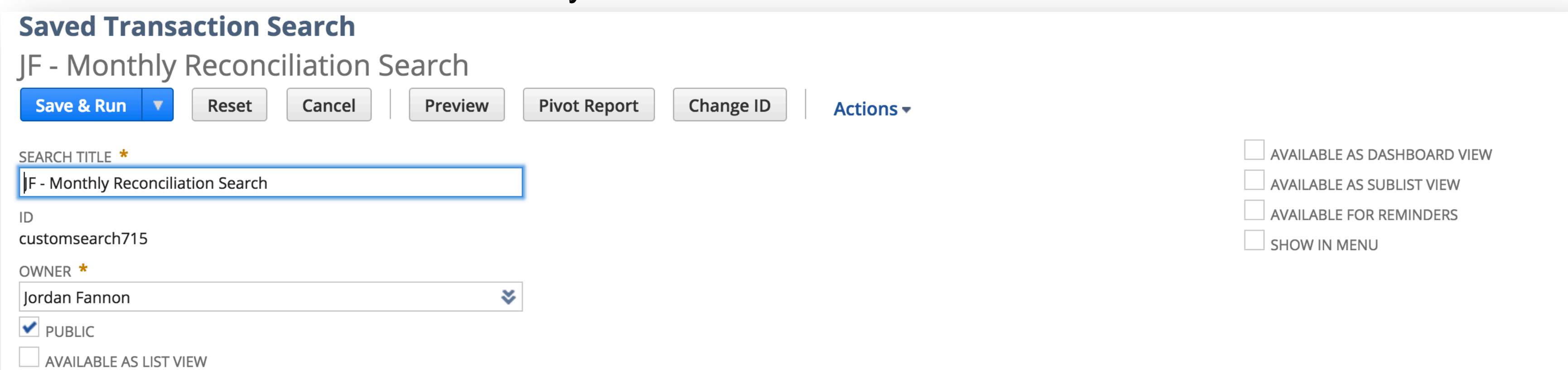


Search Builder



Administration

- Use a meaningful title
- Please enter an ID… Example: "_rmug_monthly_rec" (will appear customsearch_rmug_monthly_rec)
- Dashboard view – Show some of your search results on your dashboard.
- Reminders – Add a dynamic reminder to your dashboard for new actions
- Sublist view – Create a personal view of a list
- Show in Menu – Access your saved search from the main menu

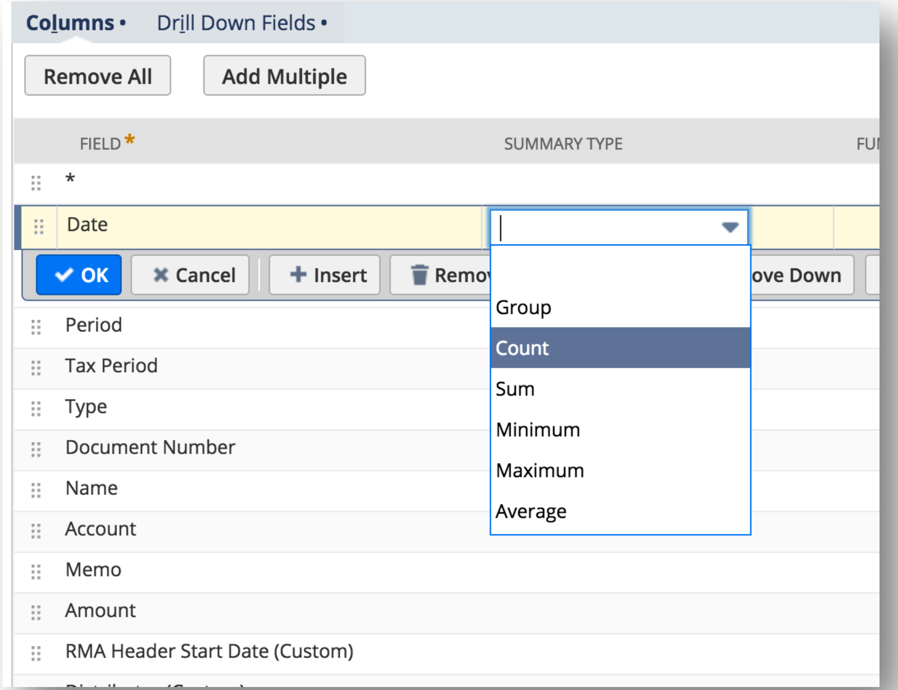


Criteria

- All fields available to the record type that you are searching on
- Narrow your search results by adding filters to only display results that you care about
- Know the difference between Main line settings to view totals vs. line level information
- Use AND, OR expressions to build more complex rules
- Case when statements are the most common formula to use to narrow results

Results

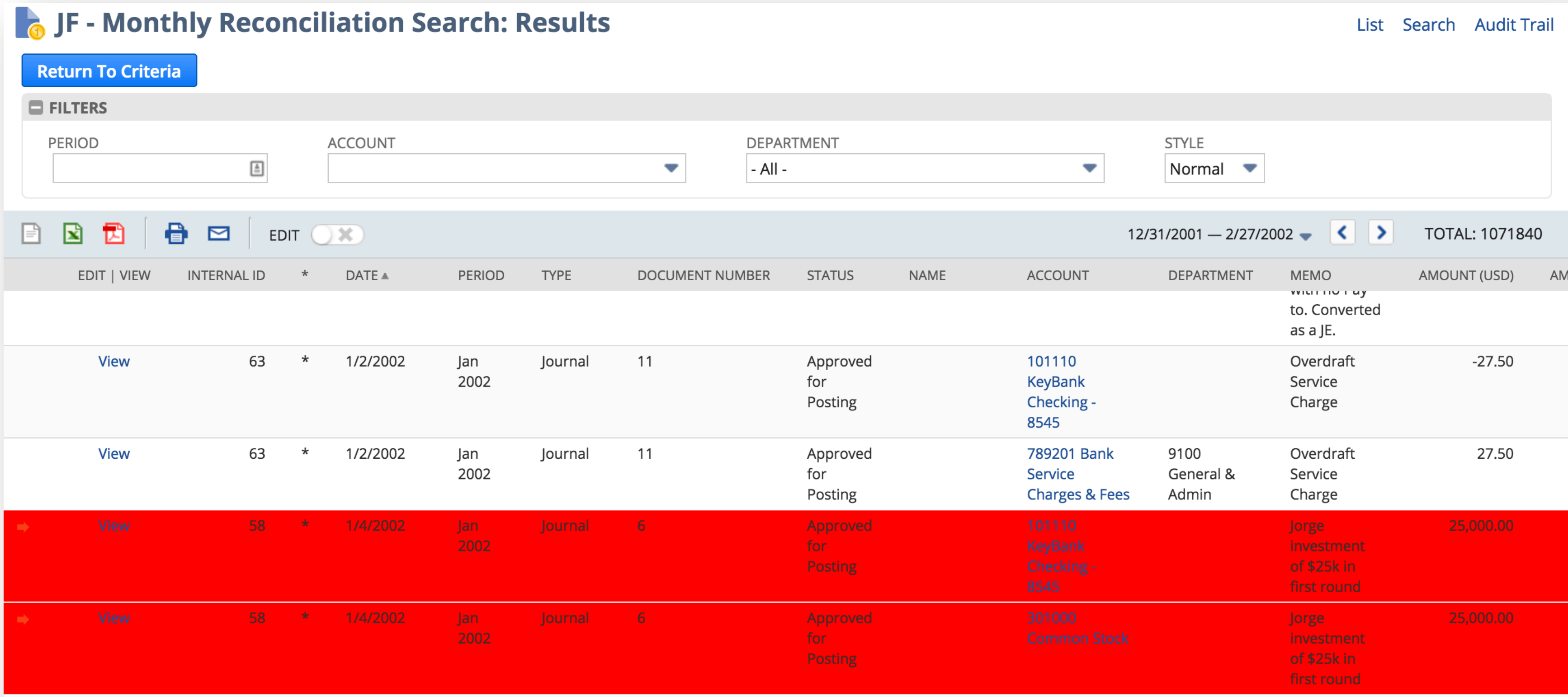
- The result section is where you determine what data is displayed when you execute the search
- * is just an indicator of the main line of a transaction vs. the line level details
- Use formulas to display values that meet certain conditions
- Summary Functions: group, sum, count, Min, Max, and Average



Highlighting

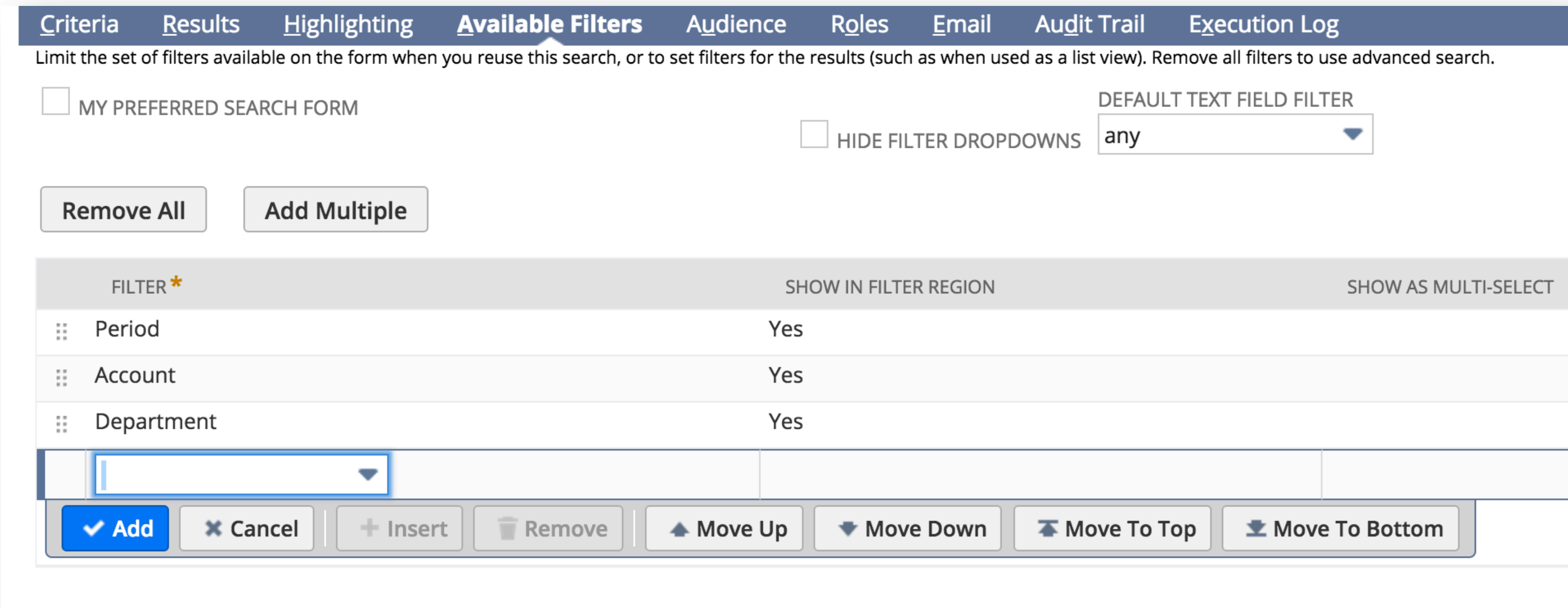
- Conditional highlighting to bring important results to your attention
- Icons, background color, and font (highlight if customer’s sales transactions over 300k)
- Images
- Text color
- Background color
- Bold text
- Add a legend for your colors

Highlighting



Available Filters

- Filters visible to a user to narrow down data on the fly

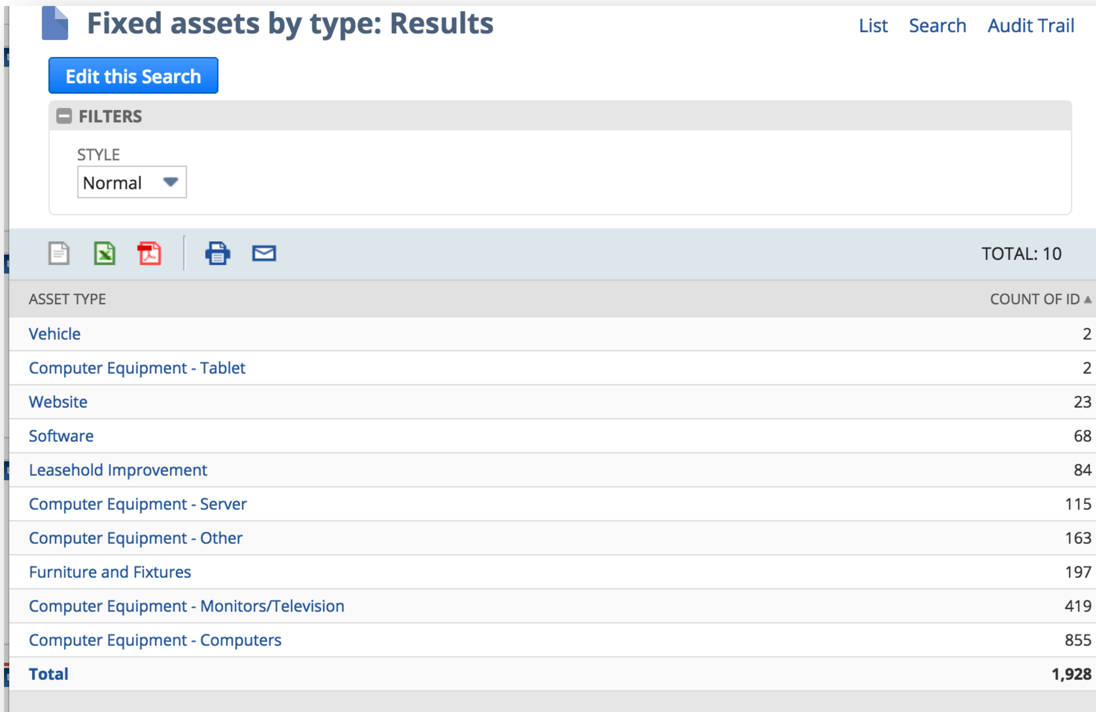


Email Settings

- Define recipients to receive scheduled emails or alerts
- If a record is updated or a field is changed, receive an email alert as soon as it happens
- If a new transaction or record matches your search criteria, be notified.
- Allow other users to subscribe to those emails
- Receive an email of all of the results based on a pre-defined recurring schedule

Summary Searches

- Compile and display data at a summary level and then drill down to view more detail and results.



ASSET TYPE	COUNT OF ID ▲
Vehicle	2
Computer Equipment - Tablet	2
Website	23
Software	68
Leasehold Improvement	84
Computer Equipment - Server	115
Computer Equipment - Other	163
Furniture and Fixtures	197
Computer Equipment - Monitors/Television	419
Computer Equipment - Computers	855
Total	**1,928**

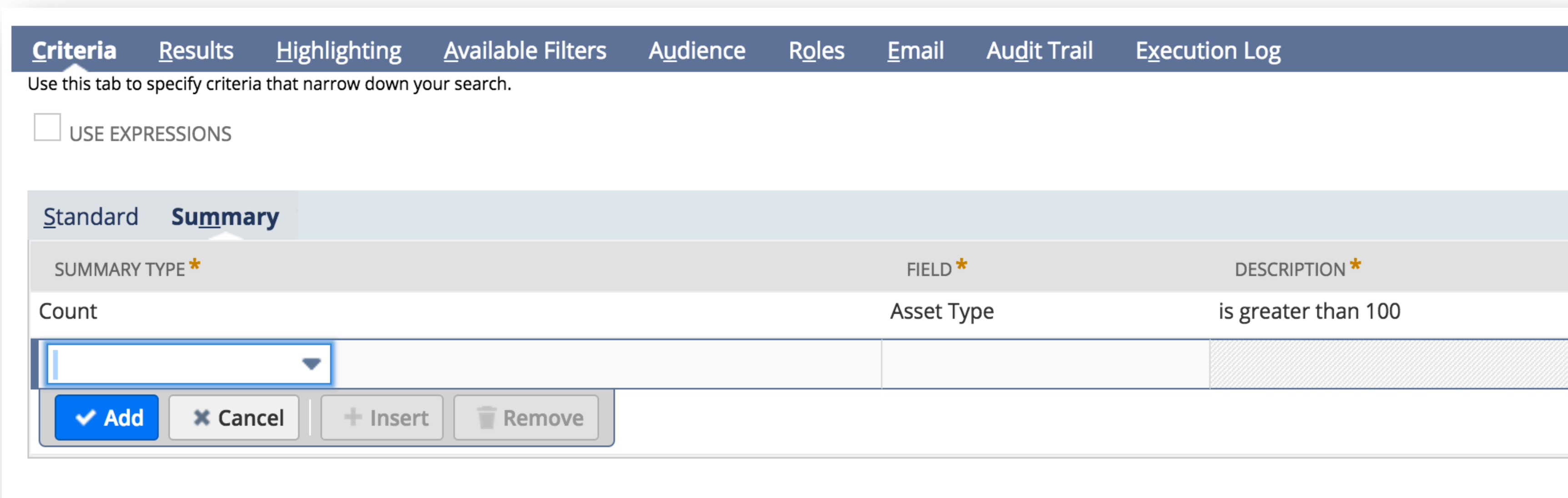
Note: Add a summary function to each result that you want to display. If you don't then your column will not display.

Summary Results

Summary Type	Purpose	Example
Group	Roll up search results by the field to which you apply this type	Group transactions by customer name
Count	Counts the number of results found that apply to this column	Count the number of items purchased by each customer
Sum	Sums search results for the column	Sum the dollar amount of sales orders for each customer
Minimum	Displays the minimum amount, or earliest date value	Show the minimum amount sold in a transaction for each customer
Maximum	Displays the maximum amount, or most recent date value	Show the maximum amount sold in a transaction for each customer
Average	Calculates the average amount found for the column	Show the average amount sold in a transaction for each customer

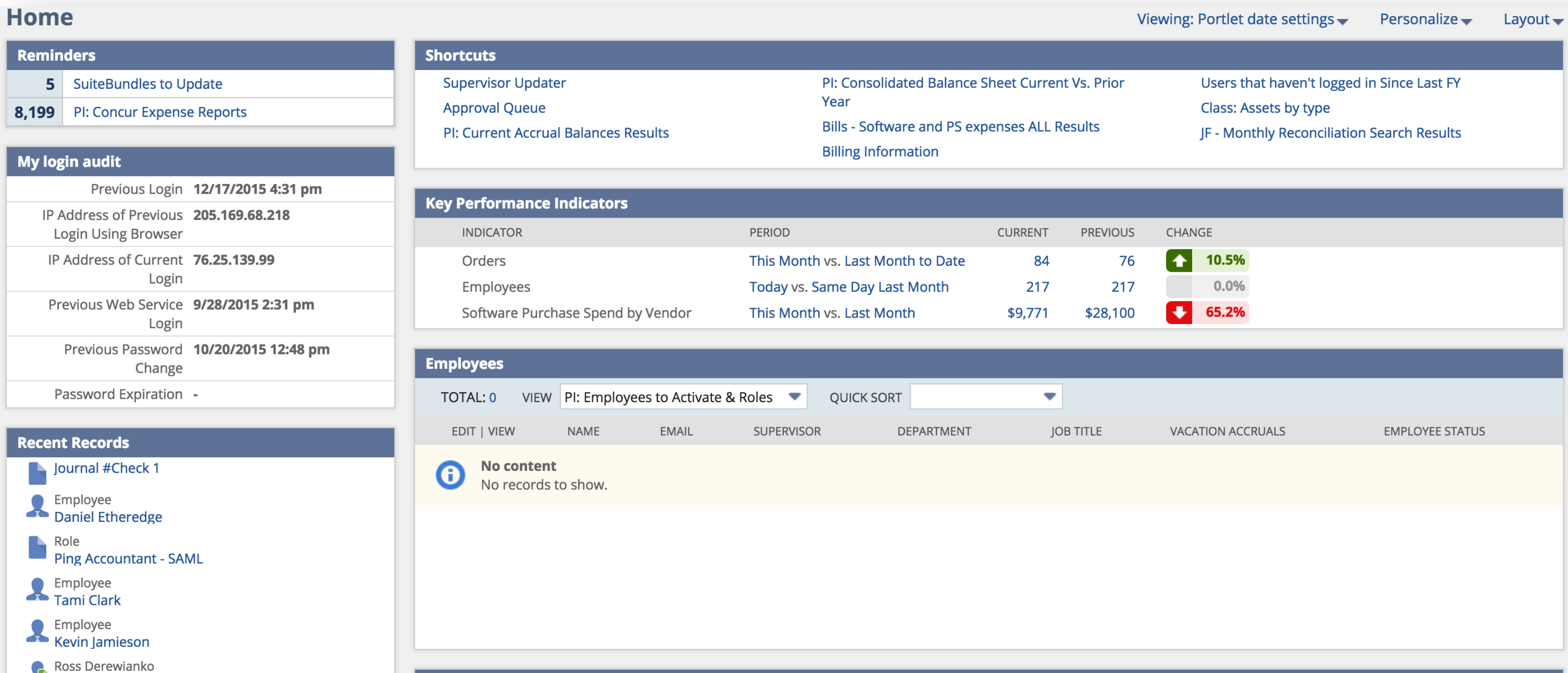
Summary Criteria

- When you are creating a summary search you can add an additional layer of filters on top of your summary results
- Example: Count all customers that have renewal orders and then show me the ones that have more than three renewal transactions



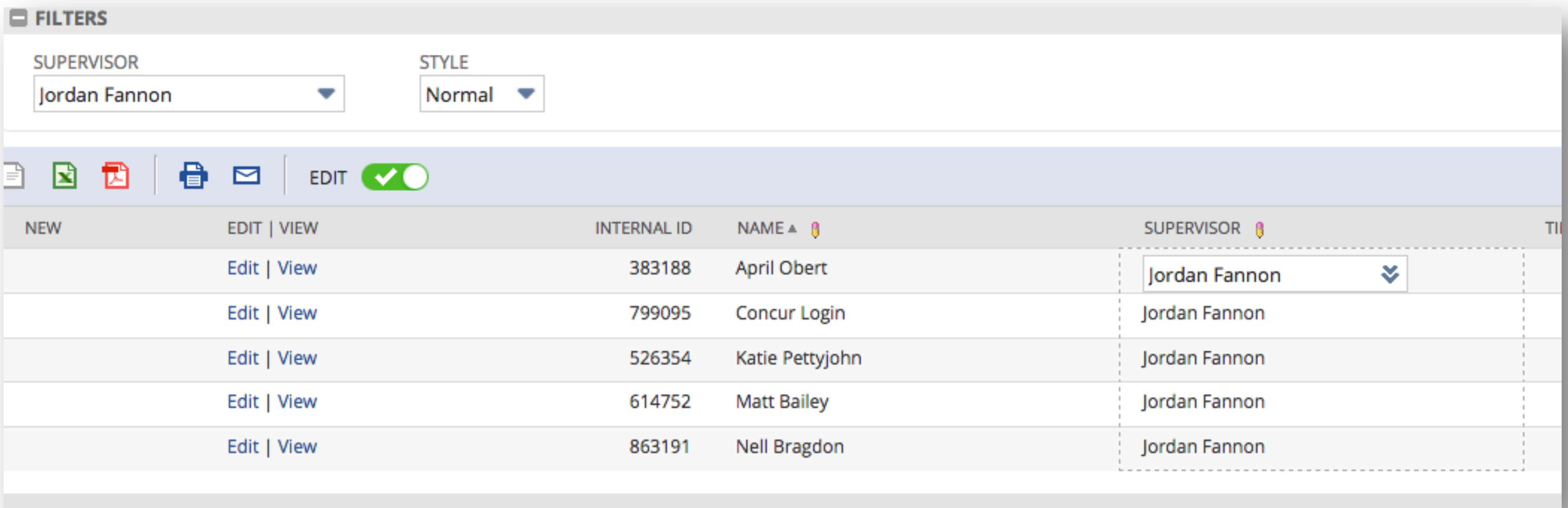
Other uses

- Use searches to create a custom dashboard and define KPIs, Graphs, and Custom reminders
- Custom sublists attached to records



Inline Editing

- Certain types of fields in the results tab can be edited on the fly without opening each record.
- You can mass edit by holding Shift to select a range of results and updating all of the records at once



Your Ideas

Questions?

Matt's favorite formulas

- NetSuite is built on an Oracle database and various Oracle SQL functions are recognized in NetSuite
  - CASE WHEN this THEN return this ELSE return that END
  - Null Value replace NVL(x, y) – if x is NULL then return y
  - INSTR() searches within a string for a substring
  - ROUND(n,[integer])
  - DENSE_RANK()
  - DECODE(val1, val2,val3) if val 1 = value 2 then return 3 ELSE 4)

  There are many many more functions found under Help>SQL Expressions.

CASE WHEN statements

- Use Case When statements to organize column data in your search results
- Each column can use a case when formula to represent specific data sets

INTERNAL ID	EMPLOYEE ▲	LOCATION	SUBSIDIARY	EMAIL	ROLE	SICK TIME	VACATION / PINGBALANCE PTO	BEREAVEMENT	VOLUNTEER TIME	PARENTAL LEAVE
278087	Adam Pisani-old	United Kingdom	10 Ping Identity Corporation : 20 Ping Identity International, Inc.	- None -	- None -	40	42.72	0	0	0
877763	Adrian Van der Est-old	Canada - Vancouver	10 Ping Identity Corporation : 20 Ping Identity International, Inc.	- None -	- None -	24	0	0	0	0
3611	Alex Cojocaru-old	Canada - Vancouver	10 Ping Identity Corporation : 20 Ping Identity International,	- None -	- None -	24	-70.72	0	0	0

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Example

- **Each column shows the sum of hours where the PTO type met a specific category for each employee**

FIELD *	TYPE	FUNCTION	FORMULA	FIELD	CUSTOM LABEL	SUMMARY LABEL
Employee : Internal ID	Group					
Employee	Group					
Employee : Location	Group					
Employee : Subsidiary	Group					
Employee : Email	Group					
Employee : Role	Group					
Payroll Item						
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Sick Time' THEN {accruedhours} ELSE 0 END		Sick time	Sick time
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Vacation' OR {payrollitem} = 'PingBalance PTO' THEN {accruedhours} ELSE 0 END		Vacation / PingBalance PTO	Vacation / PingBalance PTO
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Bereavement' THEN {accruedhours} ELSE 0 END		Bereavement	Bereavement
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Volunteer Time' THEN {accruedhours} ELSE 0 END		Volunteer Time	Volunteer Time
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Parental Leave' THEN {accruedhours} ELSE 0 END		Parental Leave	Parental Leave
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Jury Duty' THEN {accruedhours} ELSE 0 END		Jury Duty	Jury Duty
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Unpaid Time' THEN {accruedhours} ELSE 0 END		Unpaid Time	Unpaid Time
Formula (Numeric)	Sum		CASE WHEN {payrollitem} = 'Holiday Floating' OR {payrollitem} = 'Floating Holiday' THEN {accruedhours} ELSE 0 END		Floating Holiday	Floating Holiday