



Direct Calculation Using Calculated Measurement in NetSuite Workbook Pivot Table

2021-05-21 - Natalia - Comments (0) - ARTICLES

About Calculated Measurement Feature

A calculated measure is a measure provided in NetSuite Workbook that can create pivot tables and charts directly in your NetSuite account using arithmetic operations with base measures. You can define calculated measure using fields from the underlying dataset of the workbook visualization you are in. If you want to create a calculated measure using different fields, simply edit right on the dataset or contact the dataset owner if you are not the original author (permissions required).

When you create a calculated measure table, do not forget to define the field and basic operators of your calculation. All calculated measures must include a name and a valid data definition. As you create your calculated measure, a message at the bottom of the editor indicates if the definition is valid. As if it is not, an error icon will appear next to the line that contains validation errors. You can straight hover over the warning icon to see how to correct the definition.

Moreover, you can edit and delete it from the Layout panel of the visualization.

Using The Recent Features of NetSuite Workbook Calculated Measurements

Unlike formula fields which are built at the dataset level to evaluate results on each single row basis, calculated measures are now built on the workbook level using aggregated results. For example, if you create a formula field that calculates sales amounts, each row in the dataset will show a single value based on the formula definition. If you then use that

formula field as a measure in a pivot table or chart, the results are simply an aggregate of the formula field results. By contrast, calculated measures use the aggregated results of base measures combined with arithmetic operations to display results such as year over year variances and profit percentages. These types of results are not achievable using formula fields alone.

You can create as many calculated measures as you need using the fields available in the connected dataset, including custom formula fields. However, you can only use your calculated measures in the pivot tables or charts where you created them.

The screenshot shows the Oracle NetSuite CloudMaven interface. At the top, there's a navigation bar with 'ORACLE NETSUITE' and 'CLOUDMAVEN' logos, a search bar, and a menu with 'Activities', 'Contract Renewals', 'Transactions', 'Lists', 'Reports', 'Analytics', and 'Custom'. Below this is a 'Workbook' tab for 'Time Tracking Workbook'. The main area is titled 'Calculated Measure' and 'Pivot 1'. On the left, a 'Dataset' panel lists fields: 'Billable', 'Customer:Project', 'Date', 'Duration', 'Employee', 'Task', and 'Time Tracking'. Each field has an icon for its data type. The 'NAME*' field is set to '50'. The 'DEFINITION*' field contains instructions: '1 • Type or drag a field.', '• Click [icon] to change the aggregate function.', '• Type a basic operator such as *, /, +, - or ().', and '• Press Ctrl + Space to display all options.' Below the instructions, an 'Example:' shows 'Transaction Line: Amount (Net) (Sum)' followed by a division symbol and 'Transaction Line: Quantity (Sum)'. Each field in the example has a small icon to its right.

Create your calculations at ease with available fields in the Dataset Panel and basic operators. To create your calculations, you can do the following:

- Type a field name in the editor or drag a field from the Dataset panel to the editor.
- Type a basic operator such as plus (+), minus (-), multiplied by (*),

divided by (/), and parenthesis ().

- (Optional) To change the aggregate function of the selected field, click the Field Menu icon  next to the field name.
- (Optional) To display all options, press Ctrl + Space and select the fields and operators that you want to add.