

SuiteApp Navigator User Guide

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ALTERVIEW NAVIGATOR

Navigator is a native SuiteApp which provides your NetSuite account with a configurable Navigator portlet to filter down the data in your dashboards.

Navigator enhances your NetSuite dashboards by automatically reloading your dashboard portlets with relevant data and KPIs based on the selected filters in the navigator. The navigator provides the users with a real-time overview of your business, enabling you to make informed decisions at any given time.

Navigator is recommended to use in combination with Charts (bundleID: 181029) or Kanban (BundleID: 163252). In this user guide the step-by-step instructions will focus on configuring a new navigator in combination with Charts.

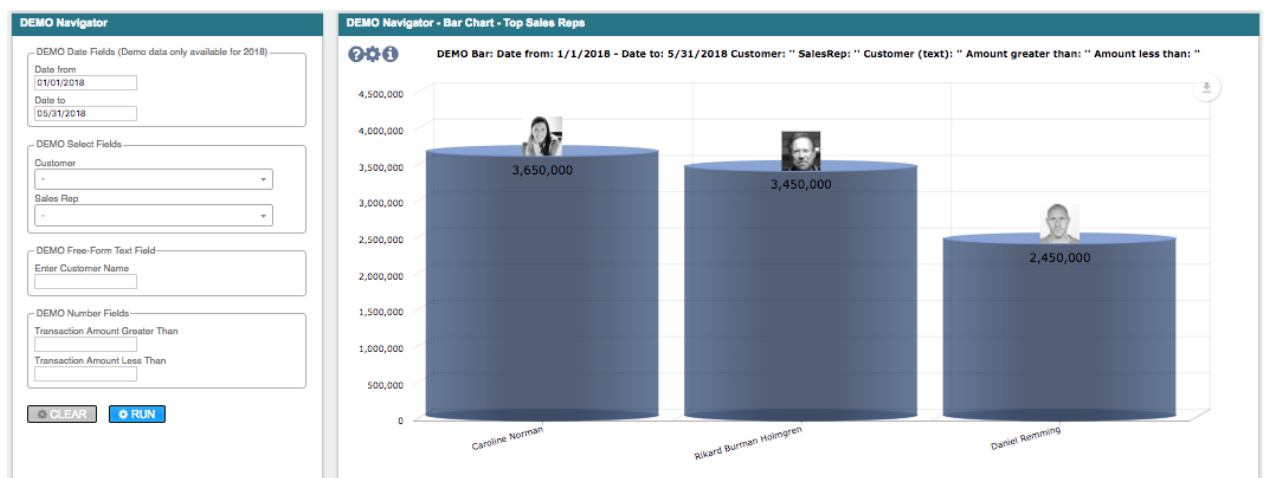
PREPARATIONS

Before starting with the configuration of the navigator in your NetSuite account it is a good idea to plan for the end result and decide which fields to include in the navigator and which portlets should be updated with the navigator.

You should mainly consider:

- Which fields should be available in the navigator portlet to filter down the data in other portlets on the dashboard.
- Which charts should be updated by the navigator. It is recommended to create the charts before setting up the navigator.

This User Guide provides general guidelines for configuring a new navigator to be used for Charts records. The data presented in these examples are included in the bundle 204176, containing prebuilt navigators and can be used as inspiration and guidance when setting up your own navigators.



CREATE ENTITY FIELDS

To be able to filter down the data with Navigator, entity fields are used to store the selected values from the navigator portlet on the current user's employee record. The first step when configuring a new navigator is therefore to create relevant entity fields.

Navigator supports the following field types:

- Date
- List/Record
- Free-Form Text
- Checkbox
- Number

Custom Entity Field - Date

Create a new entity field and select *Date* in the Type field.

Enter a label and an ID for the new field. **Important:** The ID-field should always begin with *_apn* in order for the navigator to function as expected.

Mark the checkbox *Store Value*.

Under the subtab *Applies To*, mark the checkbox *Employee*.

Under the subtab *Display*, select *Project Navigator* in the *Subtab* field.

Finish by clicking *Save*.

Custom Entity Field

Save Cancel Reset Change ID Apply to Forms Actions

LABEL
Date from

ID
custentity_apn_datefrom

INTERNAL ID
4509

OWNER
Rikard Burman Holmgren

DESCRIPTION

TYPE
Date

LIST/RECORD

☒ STORE VALUE ☐ USE ENCRYPTED FORMAT

Applies To Display Validation & Defaulting Sourcing & Filtering Access Translation History

☐ CUSTOMER ☐ CONTACT
☐ PROJECT ☐ PARTNER
☐ VENDOR ☐ GENERIC RESOURCE
☒ EMPLOYEE ☐ WEB SITE
☐ OTHER NAME ☐ GROUP

Applies To Display Validation & Defaulting Sourcing & Filtering Access

INSERT BEFORE
- Unchanged -

SUBTAB
Project Navigator

DISPLAY TYPE
Normal

Custom Entity Field – List/Record

Create a new entity field and select *List/Record* in the Type field.

Enter a label and an ID for the new field. **Important:** The ID-field should always begin with *_apn* in order for the navigator to function as expected.

Select the relevant record in the *List/Record* field.

Mark the checkbox *Store Value*.

Under the subtab *Applies To*, mark the checkbox *Employee*.

Under the subtab *Display*, select *Project Navigator* in the *Subtab* field.

Finish by clicking *Save*.

Custom Entity Field

Save ▼

Cancel

Reset

Change ID

Apply to Forms

Actions ▼

LABEL *
Customer

ID
custentity_apn_customer

INTERNAL ID
4511

OWNER
Rikard Burman Holmgren

DESCRIPTION

TYPE
List/Record

LIST/RECORD
DEMO Customer List

☒ STORE VALUE ☐ USE ENCRYPTED FORMAT

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

Translation

History

☐ CUSTOMER

☐ PROJECT

☐ VENDOR

☒ EMPLOYEE

☐ OTHER NAME

☐ CONTACT

☐ PARTNER

☐ GENERIC RESOURCE

☐ WEB SITE

☐ GROUP

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

INSERT BEFORE
- Unchanged -

SUBTAB
Project Navigator

DISPLAY TYPE
Normal

Custom Entity Field – Free-Form Text

Create a new entity field and select *Free-Form Text* in the Type field.

Enter a label and an ID for the new field. **Important:** The ID-field should always begin with *_apn* in order for the navigator to function as expected.

Mark the checkbox *Store Value*.

Under the subtab *Applies To*, mark the checkbox *Employee*.

Under the subtab *Display*, select *Project Navigator* in the *Subtab* field.

Finish by clicking *Save*.

Custom Entity Field

Save ▼

Cancel

Reset

Change ID

Actions ▼

LABEL *

Customer (Free form text)

ID

custentity_apn_customer_freeformtext

INTERNAL ID

4546

OWNER

Rikard Burman Holmgren

DESCRIPTION

TYPE

Free-Form Text

LIST/RECORD

☒ STORE VALUE ☐ USE ENCRYPTED FORMAT

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

Translation

History

☐ CUSTOMER

☐ PROJECT

☐ VENDOR

☒ EMPLOYEE

☐ OTHER NAME

☐ CONTACT

☐ PARTNER

☐ GENERIC RESOURCE

☐ WEB SITE

☐ GROUP

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

INSERT BEFORE

- Unchanged -

SUBTAB

Project Navigator

DISPLAY TYPE

Normal

Custom Entity Field – Number

Create a new entity field and select *Integer Number* in the Type field.

Enter a label and an ID for the new field. **Important:** The ID-field should always begin with *_apn* in order for the navigator to function as expected.


Mark the checkbox *Store Value*.

Under the subtab *Applies To*, mark the checkbox *Employee*.

Under the subtab *Display*, select *Project Navigator* in the *Subtab* field.

Finish by clicking *Save*.


Custom Entity Field


Save 

Cancel

Reset

Change ID

Actions 

LABEL 

Sales Amount Greater Than


ID

custentity_apn_sales_amount_greater_than

INTERNAL ID


4547

OWNER


Rikard Burman Holmgren 

DESCRIPTION

TYPE

Integer Number 

LIST/RECORD



☒ STORE VALUE ☐ USE ENCRYPTED FORMAT

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

Translation

History

☐ CUSTOMER

☐ PROJECT

☐ VENDOR

☒ EMPLOYEE

☐ OTHER NAME

☐ CONTACT

☐ PARTNER

☐ GENERIC RESOURCE

☐ WEB SITE

☐ GROUP

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

INSERT BEFORE

- Unchanged - 

SUBTAB

Project Navigator 

DISPLAY TYPE

Normal 

CREATE ALTERVIEW NAVIGATOR

Creating the navigator involves three steps. First a new Alterview Navigator record is created, the second step is to create navigator groups and the last step is to create navigator fields.

Create a new Alterview Navigator record

With the role *Alterview Charts Administrator* navigate to Administration → Alterview Navigator Setup → Alterview Navigator → New to create a new Alterview Navigator record.

Enter a name for the Navigator and optionally mark the checkbox *Reload All Portlets*. Typically, this checkbox is unmarked. Finish by clicking *Save*.

Alterview Navigator

DEMO Navigator

The screenshot shows the 'Alterview Navigator' form for a record named 'DEMO Navigator'. At the top, there are buttons for 'Save', 'Cancel', 'Reset', 'Screenshot!', and 'Actions'. Below these, there is a 'CUSTOM FORM' dropdown menu set to 'Alterview Navigator Form'. To the right of this is a checkbox labeled 'RELOAD ALL PORTLETS'. Below the dropdown is a 'NAME' field containing 'DEMO Navigator'. At the bottom left, there is an 'INACTIVE' checkbox.

Create Navigator Groups

Navigator Groups are used to structure the fields within the Navigator. Each Navigator can contain several Navigator Groups. From the Alterview Navigator record, click on the button *New Alterview Navigator Groups* to create a new Navigator Group.

Alterview Navigator

DEMO Navigator

This screenshot shows the same 'Alterview Navigator' form for 'DEMO Navigator', but with additional options. The buttons at the top now include 'Edit', 'Back', 'Screenshot!', a document icon, and 'Actions'. The 'NAME' field still shows 'DEMO Navigator' and the 'INACTIVE' checkbox is present. Below these, there are two dropdown menus: 'VIEW' (set to 'Default View') and 'ALTERVIEW NAVIGATOR GROUPS'. At the bottom, there is a light blue bar containing three buttons: 'New Alterview Navigator Groups' (which is highlighted with a red rectangle), 'Attach', and 'Customize View'. The 'RELOAD ALL PORTLETS' checkbox is also visible on the right.

Give the Navigator Group a *Name*.

Enter a number in the *Order* field. This will decide in which order the Navigator Groups will appear in the Navigator if several Navigator Groups have been configured.

Finish by clicking *Save*.

Alterview Navigator Groups

DEMO Date Fields (Demo data only available for 2018)

[Save](#) [Cancel](#) [Reset](#) [Screenshot!](#) [Actions](#)

NAME *
DEMO Date Fields (Demo data only available for 2018)

☐ INACTIVE

PARENT
DEMO Navigator

ORDER
1

Alterview Navigator Groups

DEMO Select Fields

[Save](#) [Cancel](#) [Reset](#) [Screenshot!](#) [Actions](#)

NAME *
DEMO Select Fields

☐ INACTIVE

PARENT
DEMO Navigator

ORDER
2

Create Navigator Fields

Each Navigator Group can contain several Navigator Fields. From the Alterview Navigator Groups record, click on the button *New Alterview Navigator Fields* to create new Navigator Fields.

Alterview Navigator Groups

DEMO Date Fields (Demo data only available for 2018)

[Edit](#) [Back](#) [Screenshot!](#) [Actions](#)

NAME
DEMO Date Fields (Demo data only available for 2018)

☐ INACTIVE

PARENT
DEMO Navigator

ORDER
1

VIEW
Default View

ALTERVIEW NAVIGATOR FIELDS

[New Alterview Navigator Fields](#)

[Attach](#)

[Customize View](#)

Enter information in the fields as described below.

Altview Navigator Fields

List Search More

General

☐ INACTIVE
 FIELD TYPE *
 ORDER

Source

RECORD TYPE
 SELECT OPTIONS FROM FIELD
 DISPLAY FIELD %D
 EXTRA DISPLAY FIELD %E
 DEFAULT VALUE
 DISPLAY FORMAT
 DISPLAY VALUE

Field Name

FIELD ID *
 FIELD LABEL *

Select Field Information

DEPENDENCY
 GROUP DISPLAY FIELD
 UPDATE DEPENDENCY FIELD
 DEPENDENCY FILTER EXPRESSION

Checkbox Field Information

RADIO GROUP

Date Field Information

SHOW OTHER MONTHS
 SHOW WEEK
 FIRST DAY

Field Name	Description
Field Type	Select the appropriate Field Type: <i>Select</i> – for List/Record fields <i>Text</i> – for Free-Form Text fields <i>Checkbox</i> – for Checkbox fields <i>Date</i> – for Date fields <i>Number</i> – for Integer Number fields
Order	Enter a number in the <i>Order</i> field, indicating in which order the fields will appear in the Navigator Group.
Record Type	Enter the internal ID for the record type which will be displayed in the Navigator Field. For example <i>customer</i> to display a list of Customers, or <i>customrecord..</i> to display a Custom record list.
Select Options From Field	Some lists are not exposed directly in Record Types. For example, Project Task Status. To get Project Task Status list, set the <i>Record Type</i> field to Project Task and <i>Select Options From Field</i> to <i>status</i> .
Display Field %D	Enter the internal ID of the field from the Record Type to display. For example, if the Record Type is Customer enter <i>entityid</i> to display the Customer name in the Navigator Field.
Extra Display Field %E	
Display Format	Display Value is %D and Extra Display Value is %E Valid charatcters is space,[],()and - example Format: %D (%E)
Display Value	
Default Value	
Field ID	Enter the internal ID of the Custom Entity Field (<i>custentity_apn_</i>) configured in an earlier step.
Field Label	Enter a label for the field to display in the Navigator.
Select Field Information	

Dependency	Give the name of the Field ID that this option is dependent on.
Dependency Filter Expression	For example: [customer.internalid,anyof,{custentity_apn_projectclient}] where \$n is Field ID of dependent field
Group Display Field	
Update Dependency Field	Select the field on the source record, that should be used to update the dependency listbox.
Checkbox Field Information	
Radio Group	Add a unique name for all checkbox fields that you would like to act as readibuttons
Date Field Information	
Show Other Months	
Show Week	
First Day	

Alterview Navigator Field – List/Record example

If the field to display in the Navigator is a List/Record field, the *Alterview Navigator Fields* record should be configured as described below.

Alterview Navigator Fields ← → List Search More

General

☐ INACTIVE
 FIELD TYPE *
select
ORDER
1

Source

RECORD TYPE: customrecord_demo_
 SELECT OPTIONS FROM FIELD
DISPLAY FIELD %D
name
EXTRA DISPLAY FIELD %E
DEFAULT VALUE

DISPLAY FORMAT
DISPLAY VALUE

Field Name

FIELD ID *
custentity_apn_customer
 FIELD LABEL *
Customer

Select Field Information

DEPENDENCY
 ☐ GROUP DISPLAY FIELD
UPDATE DEPENDENCY FIELD

DEPENDENCY FILTER EXPRESSION

Checkbox Field Information

RADIO GROUP

Date Field Information

☐ SHOW OTHER MONTHS
 ☐ SHOW WEEK
FIRST DAY

Alterview Navigator Field – Date example

If the field to display in the Navigator is a Date field, the *Alterview Navigator Fields* record should be configured as described below.

Altview Navigator Fields

← → List Search More

Save
Cancel
Reset
Screenshot!
Actions

General

☐ INACTIVE
FIELD TYPE *
date
ORDER
2

Source

RECORD TYPE
SELECT OPTIONS FROM FIELD
DISPLAY FIELD %D
EXTRA DISPLAY FIELD %E
DEFAULT VALUE

DISPLAY FORMAT
DISPLAY VALUE

Field Name

FIELD ID *
custentity_apn_dateto
FIELD LABEL *
Date to

Select Field Information

DEPENDENCY
GROUP DISPLAY FIELD
UPDATE DEPENDENCY FIELD

DEPENDENCY FILTER EXPRESSION

Checkbox Field Information

RADIO GROUP

Date Field Information

SHOW OTHER MONTHS
SHOW WEEK
FIRST DAY

Altview Navigator Field – Text example

If the field to display in the Navigator is a Text field, the *Altview Navigator Fields* record should be configured as described below.

Altview Navigator Fields

← → List Search More

Save
Cancel
Reset
Screenshot!
Actions

General

☐ INACTIVE
FIELD TYPE *
text
ORDER
1

Source

RECORD TYPE
SELECT OPTIONS FROM FIELD
DISPLAY FIELD %D
EXTRA DISPLAY FIELD %E
DEFAULT VALUE

DISPLAY FORMAT
DISPLAY VALUE

Field Name

FIELD ID *
custentity_apn_customer_freeformtext
FIELD LABEL *
Enter Customer Name

Select Field Information

DEPENDENCY
GROUP DISPLAY FIELD
UPDATE DEPENDENCY FIELD

DEPENDENCY FILTER EXPRESSION

Checkbox Field Information

RADIO GROUP

Date Field Information

SHOW OTHER MONTHS
SHOW WEEK
FIRST DAY

Altview Navigator Field – Number example

If the field to display in the Navigator is a Number field, the *Alterivew Navigator Fields* record should be configured as described below.

Altview Navigator Fields

Save

Cancel

Reset

Screenshot!

Actions

← → List Search More

General

☐ INACTIVE

FIELD TYPE

number

ORDER

1

Source

RECORD TYPE

SELECT OPTIONS FROM FIELD

DISPLAY FIELD %D

EXTRA DISPLAY FIELD %E

DEFAULT VALUE

DISPLAY FORMAT

DISPLAY VALUE

Field Name

FIELD ID

custentity_apn_sales_amount_greater_than

FIELD LABEL

Transaction Amount Greater Than

Select Field Information

DEPENDENCY

DEPENDENCY FILTER EXPRESSION

☐ GROUP DISPLAY FIELD

UPDATE DEPENDENCY FIELD

Checkbox Field Information

RADIO GROUP

Date Field Information

☐ SHOW OTHER MONTHS

☐ SHOW WEEK

FIRST DAY

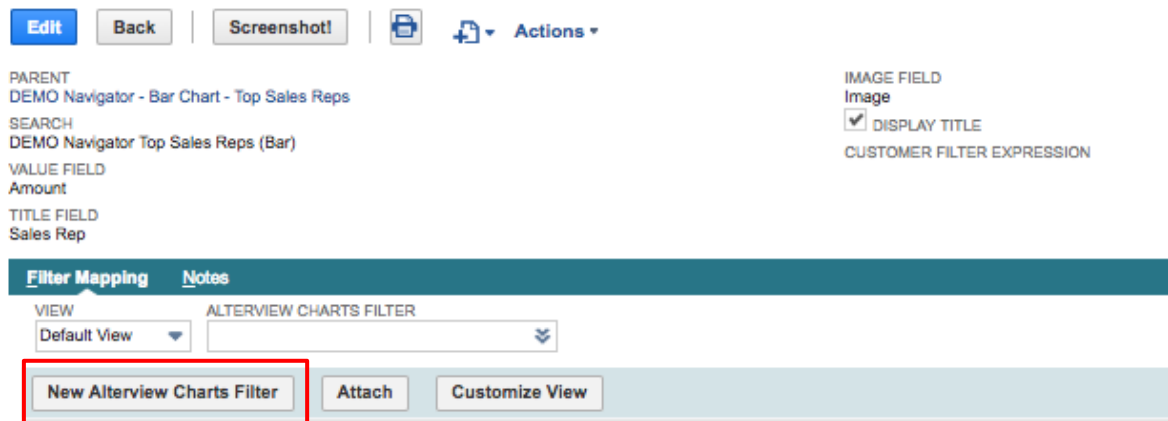
LINK THE NAVIGATOR TO A CHART RECORD

Once the Custom Entity fields and Navigator fields have been created, the Navigator should be linked to the relevant Chart(s) record. This is done by creating an Alterview Charts Filter to the selected Alterview Charts Search record.

Create a new Alterview Charts Filter record

Navigate to the Alterview Chart record which should be updated by the Navigator. For every Alterview Charts Search connected to the chart, add a new Alterview Chart Filter.

Alterview Charts Search



From the Alterview Chart Search record, click on the button *New Alterview Chart Filter* and enter information in the fields as described below.

Alterview Charts Filter



Field	Description
Formula Type	Select the appropriate Formula Type (Text, Numeric or Date)
Filter Expression	Enter the internal ID of the field which should be filtered as referred to in the search.
Formula Operator	Select the appropriate Operator
Filter Expression Value	Enter the internal ID of the corresponding Custom Entity field created in a previous step.
Filter Expression Value2	Only used when the operator is <i>Between</i> , for example between two date fields. Enter the internal ID of the corresponding Custom Entity field.

Alterview Charts Filter – List/Record example

An example of an *Alterview Charts Filter* configuration, when the field to display in the Navigator is a List/Record field.

Alterview Charts Filter

SaveCancelResetScreenshot!Actions

CUSTOM FORM *
Standard Alterview Charts Filter Form
☐ INACTIVE
PARENT
292
FORMULA TYPE
Formula Text
FILTER EXPRESSION
{custrecord_demo_sales_customer.id}

FORMULA OPERATOR
Is
FILTER EXPRESSION VALUE
{custentity_apn_customer.id}
FILTER EXPRESSION VALUE 2

Alterview Charts Filter – Date example

An example of an *Alterview Charts Filter* configuration, when the field to display in the Navigator is a Date field.

Alterview Charts Filter

SaveCancelResetScreenshot!Actions

CUSTOM FORM *
Standard Alterview Charts Filter Form
☐ INACTIVE
PARENT
292
FORMULA TYPE
Formula Date
FILTER EXPRESSION
{custrecord_demo_sales_date}

FORMULA OPERATOR
Within
FILTER EXPRESSION VALUE
{custentity_apn_datefrom}
FILTER EXPRESSION VALUE 2
{custentity_apn_dateto}

Alterview Charts Filter – Text example

An example of an *Alterview Charts Filter* configuration, when the field to display in the Navigator is a Text field.

Alterview Charts Filter

SaveCancelResetScreenshot!Actions

CUSTOM FORM *
Standard Alterview Charts Filter Form
☐ INACTIVE
PARENT
292
FORMULA TYPE
Formula Text
FILTER EXPRESSION
{custrecord_demo_sales_customer}

FORMULA OPERATOR
Contains
FILTER EXPRESSION VALUE
{custentity_apn_customer_freeformtext}
FILTER EXPRESSION VALUE 2

Alterview Charts Filter – Number example

An example of an *Alterview Charts Filter* configuration, when the field to display in the Navigator is a Number field.

Alterview Charts Filter

Save **Cancel** **Reset** **Screenshot!** **Actions**

CUSTOM FORM *

Standard Alterview Charts Filter Form

☐ INACTIVE

PARENT

292

FORMULA TYPE

Formula Numeric

FILTER EXPRESSION

{custrecord_demo_sales_amount}

FORMULA OPERATOR

Greater than

FILTER EXPRESSION VALUE

{custentity_apn_sales_amount_greater_than}

FILTER EXPRESSION VALUE 2

MOVE TO PRODUCTION

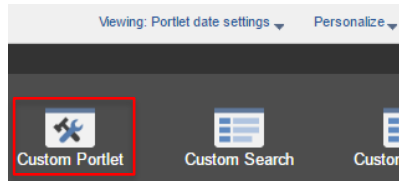
Moving a navigator to production consists of two simple steps – add a custom portlet to your dashboard and select which navigator to display in the portlet.

(Make sure to also display the charts connected to the navigator on the dashboard.)

Please note a full access user is required to use Alterview Navigator.

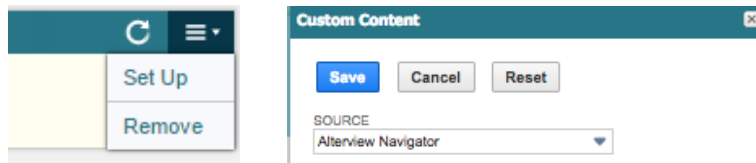
1. Dashboard Custom Portlet

Add a Custom Portlet to your selected dashboard.

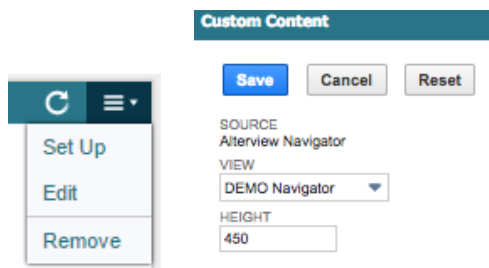


2. Setup & Edit to select navigator

Set up the custom portlet and select *Alterview Navigator* in the *Source* field and save.



Go back to the menu in the top right corner to edit the portlet and select which chart to display in the *Alterview Navigator View* field and the height of the portlet and save.



The selected navigator will display in the custom portlet.