

SuiteAnalytics: Reports and Searches

Key Tasks

How do I:

- Customize reports to meet specific user requirements?
- Present report data in a matrix view?
- Display real-time data to track key metrics and spot trends?
- Make saved search results actionable to enforce workflows?
- Create saved searches to access and dynamically display key data?
- Apply expressions, functions and basic SQL formulae to searches for more complex analysis?
- Group and total saved search results to provide a report-style look?
- Publish “smart” dashboards for specific users and roles?

Course Description

Why guess? Master the use of NetSuite reports, searches and key performance indicators (KPIs), so you can plan your company’s next winning strategy.

SuiteAnalytics: Reports and Searches will help you turn your data into knowledge and your knowledge into business strategies that take your organization where it needs to go. Over two days, you learn how to obtain actionable analysis, enforce business processes, and get real-time views into your company data across sales, marketing, service and fulfillment.

Through interactive teaching and hands-on exercises, completed in a provided demo account, you study how to create role-specific reports, saved searches and KPIs so you can empower all users with the key reports, information and measures they need to be successful.

Who Should Attend

NetSuite Administrators, super users, managers or executives who want to learn how to use reports, saved searches and KPIs more effectively.

Finance and accounting users who need to create and customize financial reports should take the “SuiteAnalytics: Financial Reports and Searches” course.

Requirements

Course participants should be familiar with NetSuite navigation and features. To learn how to navigate NetSuite and perform common tasks, watch the Getting Started training videos available on SuiteAnswers.

Related Courses

Take these courses for more training:

- SuiteAnalytics: Building Executive Dashboards
- SuiteAnalytics: Advanced Searches

Course Objectives

After completing this course, you will be able to:

- Use standard reports for point-in-time analysis.
- Customize standard reports to match business requirements.
- Share NetSuite data with external stakeholders and applications.
- Use standard metrics to monitor business trends.
- Create searches to access and dynamically display key data.
- Apply expressions, functions and basic SQL formulas for more complex analysis.
- Create custom KPIs to display critical data in easy-to-read charts and graphs.
- Create personalized, real-time dashboards rich with tools to analyze operational performance.

Day 1 Agenda: Working with Reports and Standard KPIs

Use Standard Reports: Become familiar with the pre-built reports; investigate where report data comes from; associate parent/child relationships with field names; work with report views; run reports; use output features and distribute reports.

Customize Standard Reports: Identify report requirements and plan the report design; use Report Builder to customize standard reports; share and export report data via CSV, MS Word, MS Excel, PDF, dashboards, Web Query and ODBC.

Create New Reports: Run “ad hoc” reports; set up metrics defined by role; and create reports in Summary, Detail, and Matrix formats.

Set Up Standard KPIs: Use the standard KPIs; display a KPI as a popup trend graph; setup a KPI meter; share a KPI trend graph with another application.

Creating Saved Searches and Custom KPIs

Create Saved Searches: Define saved search criteria and results; format search results; add filtering options; highlight critical information; apply basic database concepts such as joined fields.

SuiteAnswers

Get answers to your support and training related questions:

- Go to the Learning Center to find related self-paced training videos.
- Take New Feature Training to learn about the latest NetSuite release.

Live Training Webinars

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

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

Day 2 Agenda: Creating Saved Searches and Custom KPIs Continued

Publish Saved Searches: Define audiences for saved searches; publish saved searches to different application views; use saved searches as custom dashboard reminders; create saved search email alerts and scheduled emails.

Add In-Depth Analysis: Build combinations of criteria with parenthetical expressions; group data by column values for summarized results; add grand totals to numeric and currency columns.

Apply Advanced Formatting and Calculations: Use functions to format date and numeric values; build simple formulas to calculate values; identify how Oracle operators and SQL functions can be incorporated into formulas.

Present Custom Metrics: Create custom KPIs to display critical data in easy-to-read charts and graphs and display them in the KPI portlet or as a KPI Meter.

Analyzing Operational Performance

Set Up Trend Graphs and Scorecards: Display trend graphs on dashboards; create KPI scorecards to compare information over multiple date ranges or accounting periods; add formulae to scorecards to dive deeper into your data.

Realize Smart Dashboards: Assemble the various SuiteAnalytics components into “smart” dashboards; publish custom dashboards that display relevant, real-time information and metrics for specific users or roles.

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.