

SuiteAnalytics: Advanced Searches

Key Tasks

How do I:

- Enhance my search criteria by incorporating parenthetical expressions?
- Use 'Main Line is False' in searches?
- Use joins in searches to access other data elements?
- Change the sorting behavior of maximum and minimum search values?
- Work with column labels by adding HTML tags and line breaks
- Perform basic computations between two or more NetSuite fields?
- Return list/record fields as hyperlinks to easily navigate to other records via the search results?
- Make the best use of Oracle SQL functions?

Course Description

Want to take your NetSuite abilities to the next level? Acquire the final set of skills you need to create complex saved searches that effectively mine your NetSuite data for better business intelligence.

SuiteAnalytics: Advanced Searches teaches you how to dig deep into your NetSuite data. Over two days, you learn to apply advanced Saved Search functionality to calculate and transform your search results. Through interactive teaching, real-life use cases and hands-on exercises, you learn how to build searches using complex parenthetical expressions, add joins to access data, and use functions and summary types to format date and numeric values. You then go even deeper with Saved Searches by learning how to incorporate formulas and SQL functions to calculate and transform your search results to get the data you need.

Who Should Attend

- NetSuite Administrators and software developers who need to understand the power and flexibility of saved searches.
- Any one responsible for data analysis who wants to learn how to use saved searches and KPIs more effectively.

Requirements

- Participants should be familiar with creating saved searches in NetSuite
 - Prior attendance in either “SuiteAnalytics: Financial Reports and Searches” or “SuiteAnalytics: Reports and Searches” is recommended.
- A background in using structured query language (SQL) is helpful, but not required.

Course Objectives

This course introduces advanced techniques for creating Saved Searches including: expressions, HTML, formulas, and SQL statements. You are taken on a tour of formulas from introductory to advanced, incorporating NetSuite fields and Oracle SQL functions. By the end of this course, you will have implemented formulas across a variety of use cases, establishing a firm foundation for further learning.

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 1 Agenda

Expressions and Nested Expressions: Creating saved searches with multiple expressions in a single search; adding “Main line is False” to the search criteria; joining tables in search criteria; and using parenthetical expressions.

Advanced Techniques with Searches: Using ‘When Ordered By’ in searches; creating searches for System Notes; using Search Forms; considering the search’s start point.

Embed HTML in Saved Searches: Colorizing labels in Search Columns and adding Line Breaks with HTML.

Add Formulas to a Search: Applying basic formulas to manipulate strings and numbers in saved searches.

Day 2 Agenda

Making Formulas Dynamic: Incorporating Oracle SQL functions in your formulas and embedding NetSuite fields into formulas; including fields from related records.

Dates, Numbers, and CASE Statements: Calculating and formatting dates and numbers; working with number fields containing zeros and null values and creating a basic CASE statement.

Embed HTML in Formulas: Creating clickable hyperlinks to related records; displaying images in search results and adding bold/color/highlight formatting to a specific column rather than an entire row.

Formulas in Search Criteria: Creating formulas as part of search criteria.

Complex Analytics: Creating a matrix style Search; ranking search results; and using maximum and minimum summary types in searches.

Self-Study Appendix – Using ODBC within Searches: Installing the ODBC Driver, configuring ODBC, and using queries with ODBC.

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.