

# NetSuite SuiteAnalytics User Exam

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*Study Guide: June 2020*

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## About the SuiteAnalytics User Exam

Passing this exam confirms that you have the foundational knowledge and skills necessary to understand and use the searches, reports, and dashboard features of NetSuite. The credential awarded for passing this exam is the **NetSuite Certified SuiteAnalytics User**.

Conditions:

- This will be a proctored examination.
- No written or online reference materials may be used during the exam.
- 60 minutes allotted to complete approximately 30 multiple-choice and matching questions

## Description of a Qualified Candidate:

The candidate has a solid understanding of NetSuite data structure, and can pull data from NetSuite using Reports, Financial Reports, and Searches functionality. The candidate can identify the differences between the capabilities of these tools and knows how to customize layout and format across all of them. They understand how to use expressions, functions, and formulas in NetSuite SuiteAnalytics. The candidate can build Dashboards to suit the needs of a variety of end users

## Maintaining Your NetSuite Certified status:

For details about retake policy and ongoing requirements to maintain your certification or examination status, see the [NS Certification Policy](#) available on the [NS Certification webpage](#).

## Recommended Training and Background:

**Recommended Training Courses:**

- [SuiteAnalytics: Reports and Searches](#) (2 days)  
**OR** [SuiteAnalytics: Financial Reports and Searches](#) (2 days)
- [SuiteAnalytics: Advanced Searches](#) (2 days)

**Recommended Skill Level:**

Three to six months' experience in building searches and reports in NetSuite.

## Subject Areas and Objectives Covered by the Exam:

Below is a detailed list of test topics:

Subject:	Objectives:
<b>Reports &amp; Searches</b>	Given a use case, identify the best way to aggregate data results.
	Identify the NetSuite search function to obtain the described results.
	Compare the methods of sharing search results vs. reports for a given use case.
	Recognize impact of audience, access, and roles restrictions on data results.
	Identify steps to incorporate parent/child records in a saved search or report
	Identify the advantages of various methods of publishing or updating dashboards.
	Given a scenario, select the appropriate Dashboard portlet content. Compare dashboard elements to address user requirements. List vs. Custom search etc.
	Identify necessary settings to create a KPI Scorecard.
<b>Report Builder</b>	Identify the use of the Financial Report Builder Interface feature for a desired formatting result.
	Select the report builder feature that gives the desired results: show zeros, custom detail report, group with previous, and formulae.
	Recognize when a scenario requires the Alternate Date/Period Range feature.
	Identify which user requirements are better met with a custom search vs. a custom report.
<b>Advanced Searches</b>	Using Expression Builder, select the expression which would yield the desired results.
	Recognize impact of main line on transaction search results.
	Recognize which record to use as the basis of a search to yield a desired result.
	Identify features used for formatting search results.
	Recognize the difference between formulas in custom search vs. in report.
	Recognize which SQL expressions will yield desired search results: CASE, DECODE, TO_CHAR, INSTR, SUBSTR, NVL, NULLIF, Criteria formula.

## Study Suggestions

### Given a use case, identify the best way to aggregate data results.

**How to Study:** Identify requirements and plan the report design to fit your expectations. Become familiar with the pre-built reports; investigate where report data comes from.

**SuiteAnswers:** FAQ: Reports, Report Customization

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Webinar:** SuiteAnalytics Series: Customizing Reports

### Identify the NetSuite search function to obtain the described results.

**How to Study:** Know where and how to define search results display options. Understand how applying a function transforms search data value into a format most useful for your purposes

**SuiteAnswers:** Search Results Display Options, Applying Functions to Search Results Columns

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

**Webinar:** SuiteAnalytics Series: Introduction to Formulas and Functions in Saved Searches

### Compare the methods of sharing search results vs. reports for a given use case.

**How to Study:** Recognize the differences between scheduled emails and email alerts (Videos from the Reports and Searches sections in SuiteAnswers). Be able to define audiences and set up metrics defined by role.

**SuiteAnswers:** Exporting Reports, Searches, and Lists, Web Query, SuiteAnalytics Connect,

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

### Recognize impact of audience, access, and roles restrictions on data results.

**How to Study:** Understand these elements of a custom saved search: criteria, results, available filters, audience, highlighting, formula. Know how these *Home > Set preferences* settings change the way Saved Searches behave: Show Inactive, Show List when only 1 result, main line for transactions.

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

### Identify steps to incorporate parent/child records in a saved search or report

**How to Study:** Practice and understand each step. Master the different views of parent/child relationship. Associate parent/child relationships with field names.

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Identify the advantages of various methods of publishing or updating dashboards.**

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

**SuiteAnswers:** Dashboards, Publishing Dashboards Overview

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

**Given a scenario, select the appropriate Dashboard portlet content. Compare dashboard elements to address user requirements. List vs. Custom search etc.**

**How to Study:** Know how to create dashboards by using all the SuiteAnalytics components and employing best practices for design and layout.

**SuiteAnswers:** FAQ: Dashboards, Displaying Saved Search Results in Dashboard Portlets

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Webinar:** SuiteAnalytics Series: Financial Dashboards

**Identify necessary settings to create a KPI Scorecard.**

**How to Study:** Review the Standard Key Performance Indicators Table in Help.

**SuiteAnswers:** Key Performance Indicators Overview, KPI Scorecards Overview

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Webinar:** SuiteAnalytics Series: Leveraging the Power of SuiteAnalytics for Finance, SuiteAnalytics Series: Essential KPIs and Dashboard Metrics,

**Identify the use of the Financial Report Builder Interface feature for a desired formatting result.**

**How to Study:** Master the customization of Financial Statements. Understand the differences between reports and financial statements.

**SuiteAnswers:** Financial Report Builder

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Select the report builder feature that gives the desired results: show zeros, custom detail report, group with previous, and formulae.**

**How to Study:** Build combinations of criteria with parenthetical expressions; group data by column values for summarized results; add grand totals to numeric and currency columns.

**SuiteAnswers:** Reporting Overview

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Recognize when a scenario requires the Alternate Date/Period Range feature.**

**How to Study:** Know how to customize reports to include comparisons of values across different date ranges or period ranges.

**SuiteAnswers:** Adding Time-Based Comparison Columns to Reports

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

**Identify which user requirements are better met with a custom search vs. a custom report.**

**How to Study:** Review the SuiteAnalytics Task Matrix. Study the differences between Custom Report and Custom Search (what can you do vs. what can't you do in each tool?).

**SuiteAnswers:** FAQ: Search, FAQ: Reports

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Using Expression Builder, select the expression which would yield the desired results.**

**How to Study:** Get familiar with the expressions you can use in Reports and Searches. Analyze the differences.

**SuiteAnswers:** Using And/or Expressions in Search Criteria

**Courses addressing this topic:** SuiteAnalytics: Advanced Searches

**Recognize impact of main line on transaction search results.**

**How to Study:** Understand what main line is and know how to recognize it within the search results.

**SuiteAnswers:** Main Line in Transaction Search Criteria

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

**Recognize which record to use as the basis of a search to yield a desired result.**

**How to Study:** Identify the search requirements and plan the design. Learn how joining different record types can affect your results.

**Courses addressing this topic:** SuiteAnalytics: Financial Reports and Searches

**Identify features used for formatting search results.**

**How to Study:** Know how to format search results; add filtering options; highlight critical information.

**SuiteAnswers:** Highlighting Search Results

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

**Recognize the difference between formulas in custom search vs. in report.**

**How to Study:** Understand how the different builders works. Build simple formulas to calculate values; identify how Oracle operators and SQL functions can be incorporated into formulas.

**SuiteAnswers:** Formulas in Search, Adding Formula Fields to Reports

**Courses addressing this topic:** SuiteAnalytics: Advanced Searches

**Recognize which SQL expressions will yield desired search results: CASE, DECODE, TO\_CHAR, INSTR, SUBSTR, NVL, NULLIF, Criteria formula.**

**How to Study:** Check out the support articles in SuiteAnswers for sample functions and practice within NetSuite.

**SuiteAnswers:** SQL Expressions, Search Formula Examples and Tips

**Courses addressing this topic:** SuiteAnalytics: Advanced Searches



## Sample Questions

Please see [SuiteAnalytics User Sample Test](#)