

NetSuite SuiteAnalytics User Exam

Study Guide: March 2021

Contents

About the SuiteAnalytics User Exam.....	3
Description of a Qualified Candidate:.....	3
Maintaining Your NetSuite Certified status:.....	3
Recommended Training and Background:.....	3
Subject Areas and Objectives Covered by the Exam:	4
Study Suggestions	5
Sample Questions	9

About the SuiteAnalytics User Exam

Passing the SuiteAnalytics User Exam confirms that you have the knowledge and skills necessary to understand and use NetSuite searches, reports, and dashboard features. 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.
- You are allotted 60 minutes 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 search functionality. The candidate can identify the differences between the capabilities of these tools and knows how to customize layouts and formats across all of them. The candidate understands how to use expressions, functions, and formulas in NetSuite SuiteAnalytics. The candidate can also build dashboards to suit the needs of various users.

Maintaining Your Certification

For the retake policy, details on the ongoing requirements to maintain certification, and 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

The table below provides a detailed list of exam topics.

Subject	Objectives
Reports & Searches	Given a use case, identify the best way to aggregate data results.
	Identify the NetSuite search function to obtain the described results.
	Compare methods of sharing search results versus reports for a given use case.
	Recognize the impact of audience, access, and role restrictions on data results.
	Identify steps to incorporate parent/child records in a saved search or report.
	Identify the advantages of various methods for publishing or updating dashboards.
	Given a scenario, select the appropriate dashboard portlet content. Compare dashboard elements to address user requirements. For example, a list versus a custom search.
	Identify the necessary settings to create a KPI Scorecard.
Report Builder	Identify uses of the Financial Report Builder Interface feature for a desired formatting result.
	Select the Report Builder feature that gives the desired results; for example, 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 versus a custom report.
Advanced Searches	Using the Expression Builder, select the expression that yields the desired results.
	Recognize the 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 the features used to format search results.
	Recognize the difference between formulas in a custom search versus in a report.
	Recognize which SQL expressions will yield desired search results, including: CASE, DECODE, TO_CHAR, INSTR, SUBSTR, NVL, NULLIF, and Criteria formula.

Study Suggestions

Reports and Searches

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

How to Study: Identify the requirements and plan the report or saved search design to fit your expectations. Become familiar with how to customize reports and investigate where report data comes from. Understand search types, search criteria parameters, and how to use search summary types.

SuiteAnswers Articles: FAQ: Reports, Report Customization; Defining an Advanced Search; Advanced Search Criteria Filters; Summary Type Descriptions

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 display options for search results. Understand how applying a function transforms search data values into a format that is useful for your purposes.

SuiteAnswers Articles: 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 methods of sharing search results versus reports for a given use case.

How to Study: Know all ways to set up users to access the results of reports and saved searches. Recognize the differences between scheduled emails, exported reports, and email alerts (refer to videos from the Reports and Searches sections in SuiteAnswers). Be able to define audiences and set up metrics defined by role.

SuiteAnswers Articles: Saved Search Email; Exporting a Report; Exporting Search Results

Courses Addressing this Topic: SuiteAnalytics: Reports and Searches

Recognize the impact of audience, access, and role restrictions on data results.

How to Study: Know how to define audiences and set up metrics defined by role for saved searches and reports. Understand options on the Audience and Roles tabs for saved searches. Understand options for Access and Audience on custom reports. Compare the differences between how to define audience on a saved search versus a custom report. Know how the following settings affect data results: Run Unrestricted, Max Results, Disallow Drill Down, and My Preferred Search Results.

SuiteAnswers Articles: Sharing Custom Reports with Other Users; Defining Audiences for Saved Searches

Courses Addressing this Topic: SuiteAnalytics: Reports and Searches

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

How to Study: Understand how to use parent/child record relationships in saved searches and reports. Understand where information is stored and which records information comes from. Understand how to combine information from different records to get desired results in a saved search or report. Practice and understand each step.

SuiteAnswers Articles: Report Customization; Adding, Removing, or Reordering Report Columns

Courses Addressing this Topic: SuiteAnalytics: Reports and Searches

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

How to Study: Know how to publish custom dashboards that display relevant, real-time information and metrics for specific users or roles. Know who can publish and update dashboards. Know settings that allow or disallow users from modifying dashboards published to them.

SuiteAnswers Articles: Dashboards Overview; 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. For example, a list versus a custom search.

How to Study: Know for the purpose and kinds of data to use with different portlet types so that, when given data examples, you can recognize the portlet type to use. Recognize available settings for each portlet type.

SuiteAnswers Article: Portlet Types Table

Courses Addressing this Topic: SuiteAnalytics: Financial Reports and Searches

Webinar: SuiteAnalytics Series: Financial Dashboards

Identify the necessary settings to create a KPI Scorecard.

How to Study: Know how to create a saved search for a Key Performance Indicator (KPI) and how to create KPI Scorecard. Review the SuiteAnswers topics listed below. Practice creating KPI Scorecards from both standard and custom KPIs.

SuiteAnswers Article: Creating a KPI Scorecard

Courses Addressing this Topic: SuiteAnalytics: Financial Reports and Searches

Webinar: SuiteAnalytics Series: Essential KPIs and Dashboard Metrics

Report Builder

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

How to Study: Master customizing financial statements. Understand the options under each tab of the Financial Report Builder, including: Edit Layout, Edit Columns, Filters, Sorting, and More Options. Understand the order in which to edit these tabs.

SuiteAnswers Article: Financial Report Builder

Courses Addressing this Topic: SuiteAnalytics: Financial Reports and Searches

Select the Report Builder feature that gives the desired results; for example: show zeros, custom detail report, group with previous, and formulae.

How to Study: Know the above-mentioned options. Build combinations of criteria with parenthetical expressions. Group data by column values for summarized results. Add grand totals to numeric and currency columns.

SuiteAnswers Articles: Reporting Overview; Report Customization; Report Builder Interface

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 value comparisons across different date ranges or period ranges.

SuiteAnswers Article: 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 versus a custom report.

How to Study: Study the differences between a custom report and a custom search; that is, what can and cannot be done in each. Understand how to share saved search and reports results. Compare the formula capabilities in a custom search versus a custom report.

SuiteAnswers Articles: FAQ: Search; FAQ: Reports

Courses Addressing this Topic: SuiteAnalytics: Financial Reports and Searches

Advanced Searches

Using the Expression Builder, select the expression that yields the desired results.

How to Study: Become familiar with available expressions to use in reports and searches and analyze the differences.

SuiteAnswers Article: Using AND/OR Expressions in Search Criteria

Courses Addressing this Topic: SuiteAnalytics: Advanced Searches

Recognize the impact of main line on transaction search results.

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

SuiteAnswers Article: Main Line in Transaction Search Criteria

Courses Addressing this Topic: SuiteAnalytics: Reports and Searches

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

How to Study: Identify search requirements and plan the search design. Learn how joining different record types can affect results. Note limits on available fields, depending on which record you start with.

SuiteAnswers Article: Searchable Record Types

Courses Addressing this Topic: SuiteAnalytics: Financial Reports and Searches

Identify the features used to format search results.

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

SuiteAnswers Article: Highlighting Search Results

Courses Addressing this Topic: SuiteAnalytics: Reports and Searches

Recognize the difference between formulas in a custom search versus in a report.

How to Study: Understand how different builders works. Build simple formulas to calculate values. Identify how to incorporate operators and SQL functions into formulas.

SuiteAnswers Articles: Formulas in Search; Adding Formula Fields to Reports

Courses Addressing this Topic: SuiteAnalytics: Advanced Searches

Recognize which SQL expressions will yield desired search results, including: CASE, DECODE, TO_CHAR, INSTR, SUBSTR, NVL, NULLIF, and Criteria formula.

How to Study: Review support articles in SuiteAnswers for sample functions and practice within NetSuite.

SuiteAnswers Articles: SQL Expressions; Search Formula Examples and Tips

Courses Addressing this Topic: SuiteAnalytics: Advanced Searches

Sample Questions

Please see the [SuiteAnalytics User Sample Test](#).