SuiteAnalytics: Reports and Searches

Module 05: Setting Up Standard KPIs

Page 31 in your Student Guide

NETSUITE | SuiteTraining

About This Module

How do you monitor key business drivers and how quickly can you spot changes in your business?

Do you spend hours running reports and drilling for data?

- Do you need the information “right now”?
- Do you need a real-time display, each time you access NetSuite?

Using Key Performance Indicators (KPIs) facilitates:

- Tracking specific metrics
- Spotting changes in your business drivers, as they happen

Module Objectives

1. Add the KPI portlet to the Home Dashboard
2. Setup standard KPIs
3. Display a KPI as a popup trend graph
4. Setup a KPI meter
5. Share a KPI trend graph with another application

What is a Key Performance Indicator?

A KPI is a measurement or count of one of your business metrics:

- Shows key variances and over-time trends
- Helps identify trends so you can make course corrections in a timely fashion

NetSuite provides over 75 pre-packaged KPIs based on NetSuite standard reports:

- Synthesizes your raw data into critical business metrics in the formats you choose
- Allows you to spend more time learning from and acting on important data, and less time gathering it

Key Performance Indicators

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Sales	This Year vs. Three Fiscal Years Ago	$11,261,147	$11,399,951	1.2%
Total Bank Balance	This Period vs. Last Period	$41,444,752	$40,263,827	2.9%
COGS	This Period vs. Last Period	$4,586,137	$1,865,090	145.9%
Income	This Period vs. Last Period	$5,665,290	$2,833,466	99.9%
New Business	This Month vs. Same Month Last FQtr to Date	$61,691	$0	N/A
Open Opportunities	This Month vs. Last Month to Date	3	0	N/A
Net Cash Flow	This Period vs. Last Period	$1,180,925	$2,775,346	57.4%
Payables	Today vs. Same Day Last Month	$3,439,610	$1,085,273	216.9%
Revenue	This Period vs. Last Period	$5,677,474	$2,778,299	104.4%

Use KPIs When You Need To

Track information to spot trends in your business, for example:

- A KPI on the Bank Balance with a Threshold set will let you know if the Company Bank Balance falls below $20,000
- A KPI on Sales will let you know if Sales are trending up or down, and by how many percentage points
- A KPI on Web Page hits will allow you to see if more or fewer people are visiting your website

KPIs Are Role-Based and Feature-Based

The KPIs you choose depend upon the Role used to log in to NetSuite and features enabled in your NetSuite account

Key Performance Indicators

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Open Cases	Today vs. Same Day Last Month	47	47	0.0%
New Cases	This Week vs. Last Week	0	0	0.0%
Cases Closed	This Week vs. Last Week	0	0	0.0%
Cases Escalated	This Month vs. Same Month Last FQtr to Date	7	0	N/A

Support Rep's Key Performance Indicators Portlet

Key Performance Indicators

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Opportunities Won	This Month vs. Last Month to Date	11	3	266.7%
Pipeline (Projected)	This Month	$611,261		
Quota	This Month vs. Last Month	$8,988,000	$7,958,000	12.9%
Forecast	This Month	$7,173,584		
Orders	This Month vs. Last Month to Date	62	19	226.3%
Sales	This Month vs. Last Month to Date	$5,745,778	$766,342	649.8%
Estimated Commission	This Month vs. Last Month to Date	$603,755	$71,422	745.3%
Authorized Commission	This Month	$56,246		

Sales Manager's Key Performance Indicators Portlet

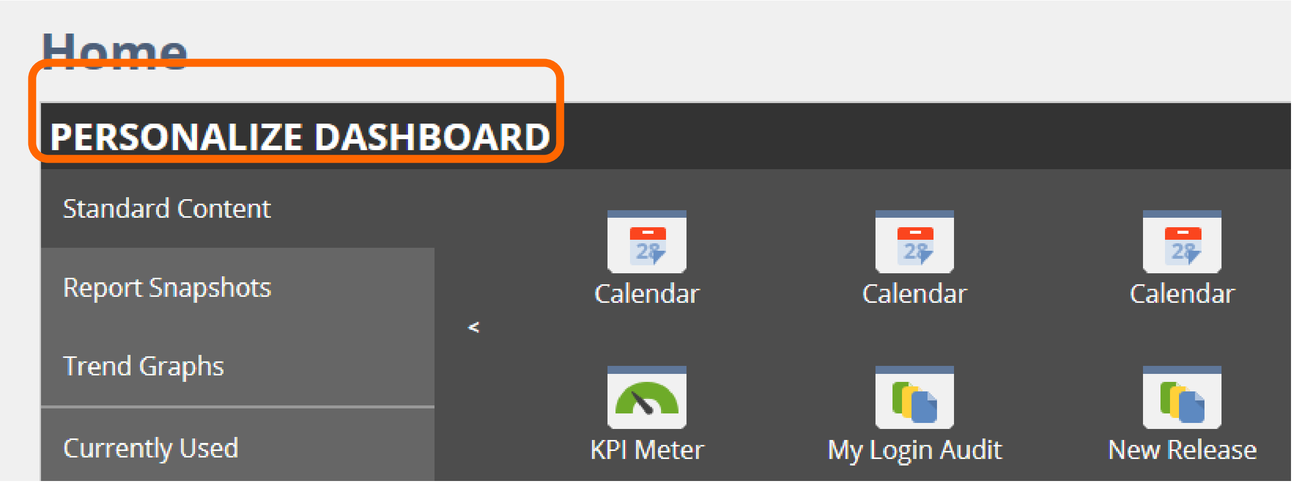
Walkthrough: Set Up KPI Portlet and Meters

1. Add Metrics to the Home Dashboard
2. Set up the KPI Portlet
3. Configure the KPIs
4. Configure KPI Headlines (optional)
5. Configure the Popup Trend Graphs
6. Set Up KPI Meter

1. Add Metrics to the Home Dashboard

Click the **Personalize** link in the upper right area of the Home Dashboard to open the **Personalize Content** panel and select, or drag and drop the following portlets:

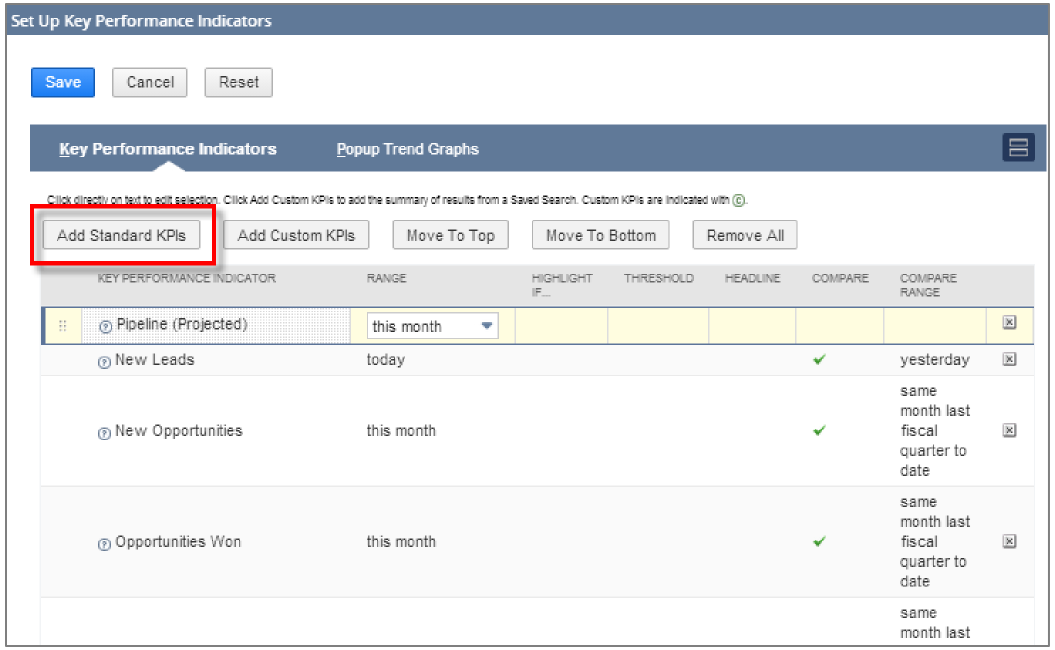
- KPI Meter - up to 3
- Key Performance Indicators
- Trend graph



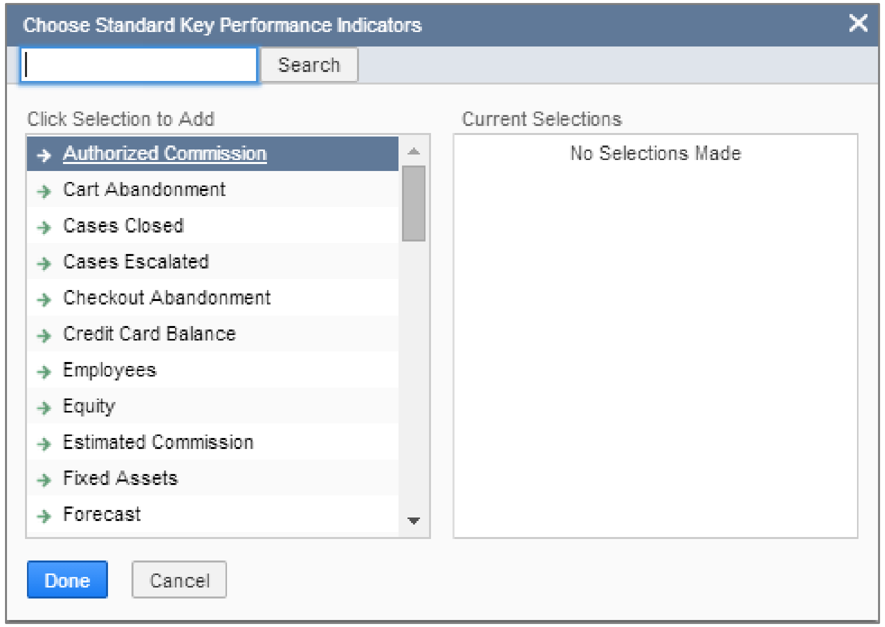
2. Setup the KPI Portlet

Click **Setup**, in the KPI portlet, on the Home Dashboard

- Click **Add Standard KPIs**



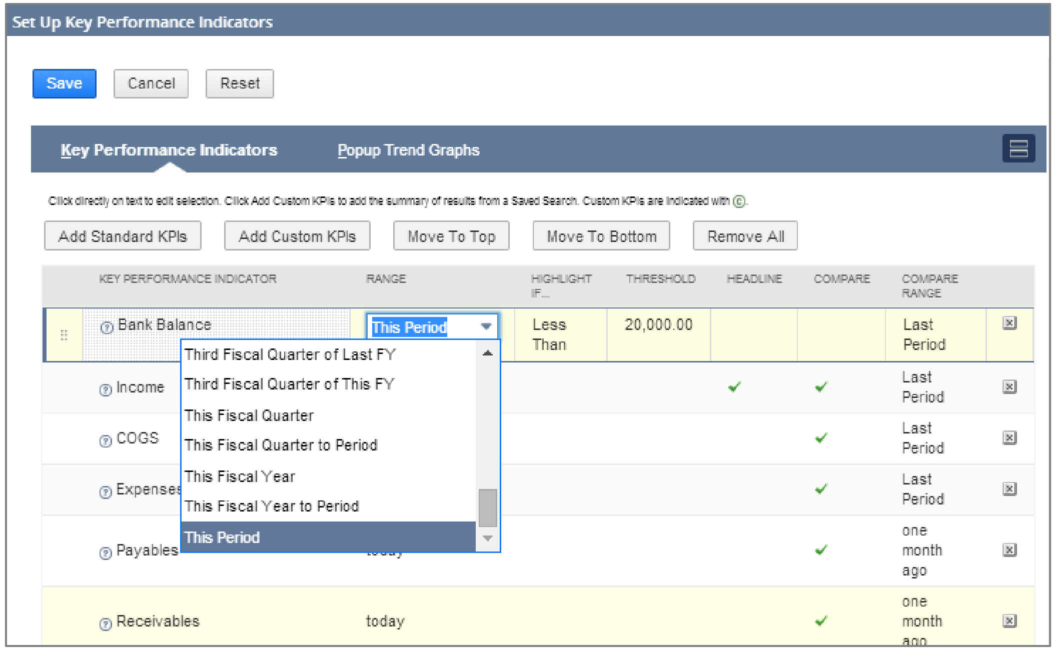
- Choose the KPIs in the pop-up window and then click **Done**



3. Configure the Selected KPIs

Configure your KPIs and save your changes:

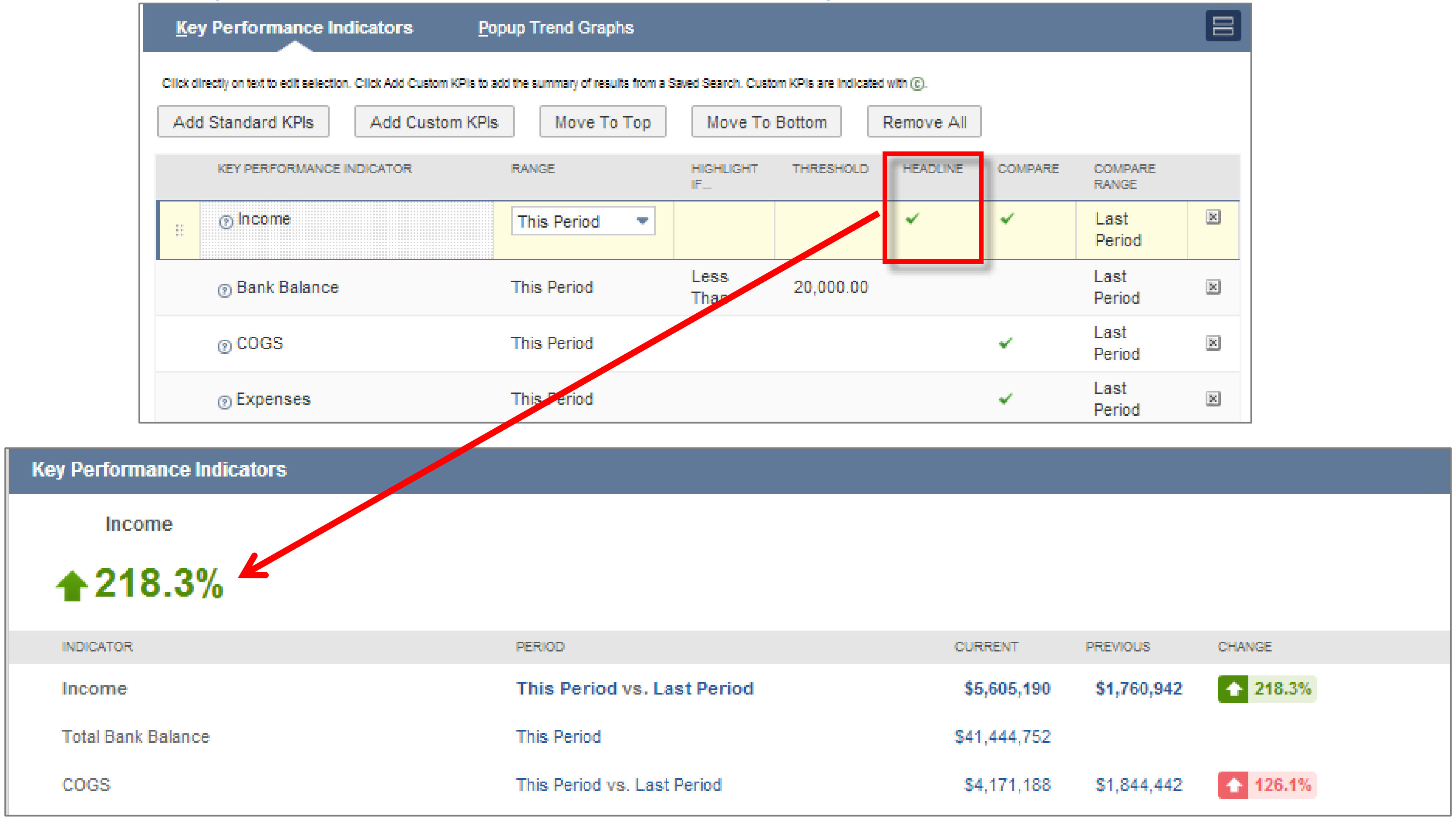
- Move KPIs up or down, for preferred display order
- Set the date Range and Compare Range, if needed
- Choose Employees to display data for
- Turn on or turn off comparisons
- Setup Highlight and Thresholds functionality



3. Configure the KPI Headlines (Optional)

Extra prominence can be given to KPIs using the Headline feature

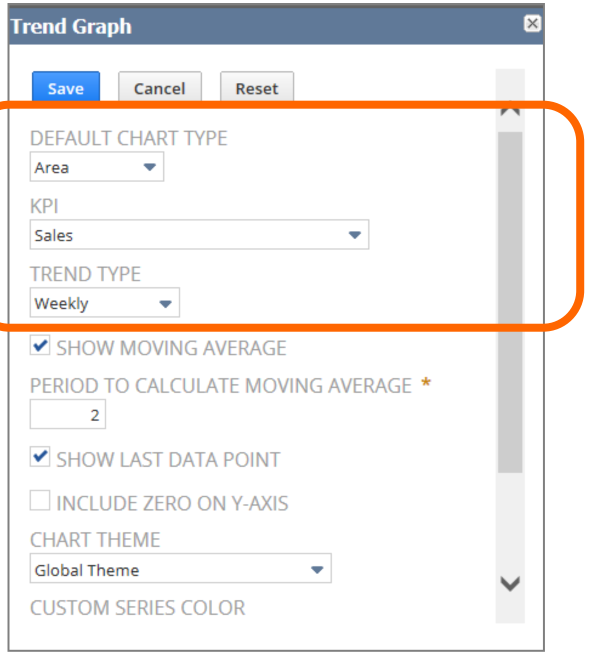
- Don’t have too many headlines as this dilutes the impact



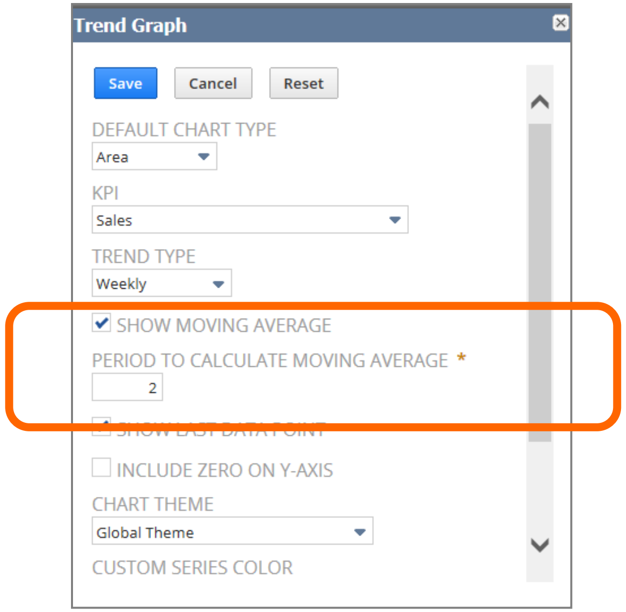
4. Configure KPI Trend Graph…

Click **Setup** in the upper right area of the **Trend Graph**

- **Default Chart Type:** select which chart displays by default
- **KPI:** select the KPI to display from the drop down list
- **Trend Type:** select the default time increment to display

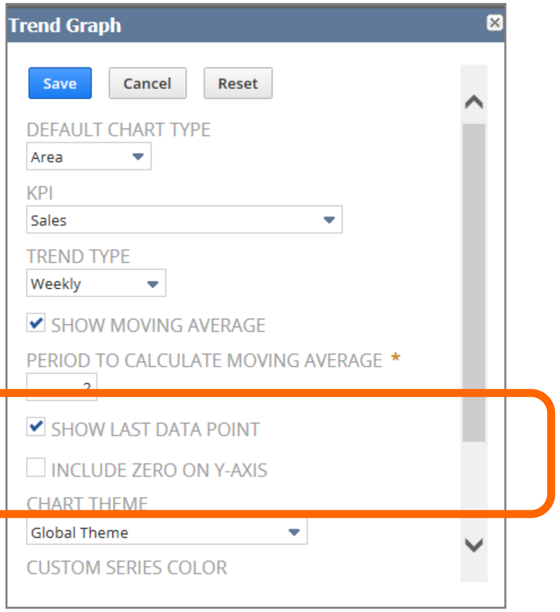


4. Configure KPI Trend Graph…



- **Show Moving Average:** Smoothens irregular data to expose underlying trends
- **Show Last Data Point:** If left unchecked, excludes the last data point in popup trend graphs:
  - If left checked the latest data might not be complete - example, one week into a new month shows only one week's data compared to the previous complete month. Leave unchecked to exclude data for incomplete periods

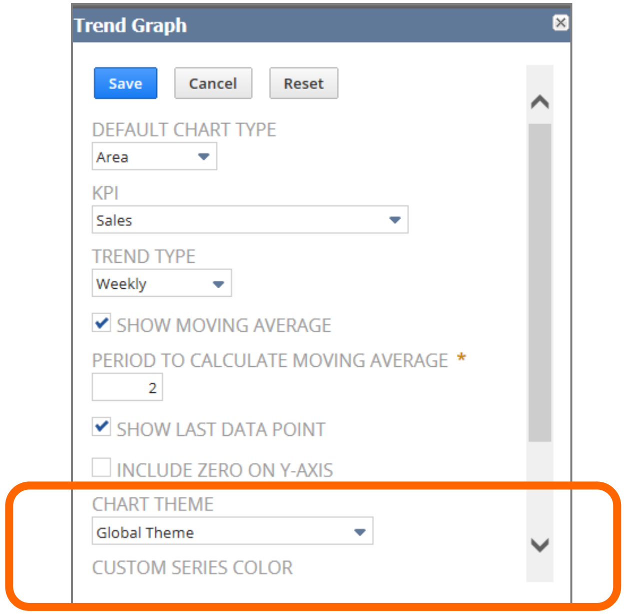
4. Configure KPI Trend Graph…



Include Zero on Y-Axis: Starts graph plotting at zero

- If checked, includes zero as the starting point in popup trend
- By default, option is disabled to avoid showing misleading dramatic increases in initial trend graph data. Enable this option only if the time period data represented in the KPI truly starts at zero
- **Save** your settings

4. Configure KPI Trend Graph

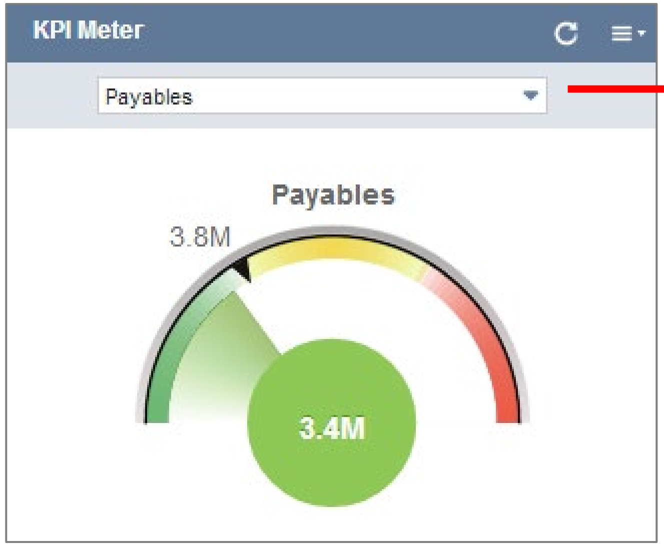


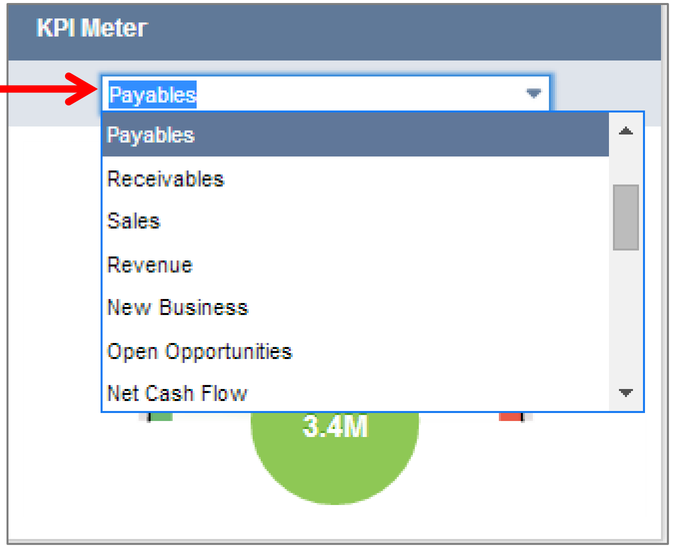
- **Chart Themes:** select a theme that configures the look and colors of shapes representing popup trend graph data
- **Chart Background:** You can set the background to display behind popup trend graph data here
- **Custom Series Color:** select a color or enter the hexadecimal value for the color you want to use for the trend graph line
- **Save** your settings

5. Setup a KPI Meter

Click the dropdown menu, in the KPI portlet, and select the KPI that you want to display as a meter

- **Note:** The KPI must first be displayed in the KPI portlet



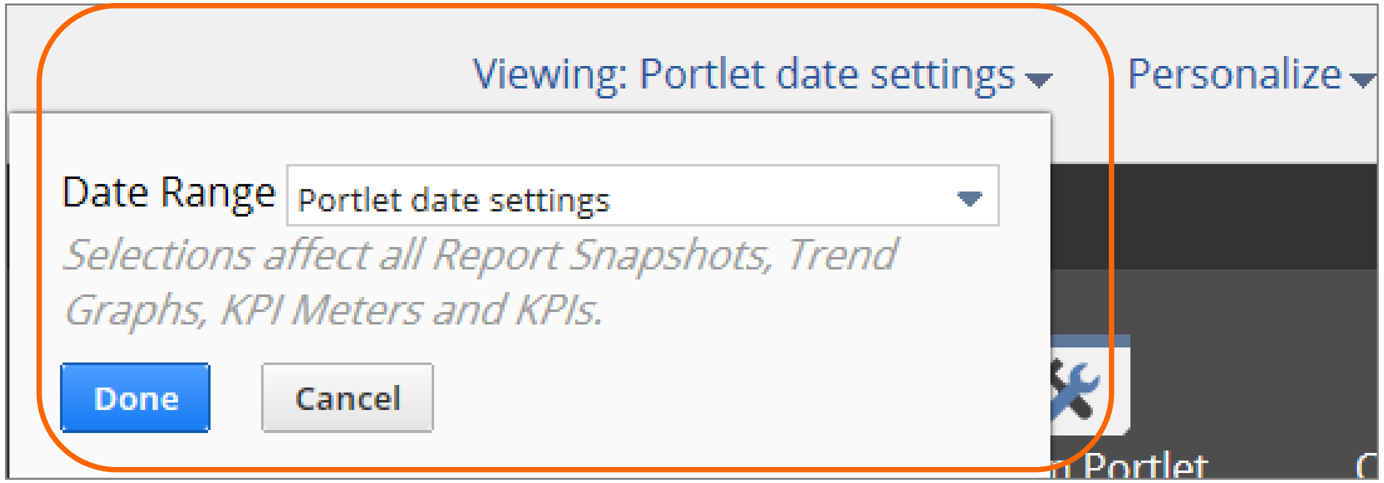


KPI Meters are graphical representations of your KPIs

- Up to 3 KPI meters can be displayed on the Home Dashboard

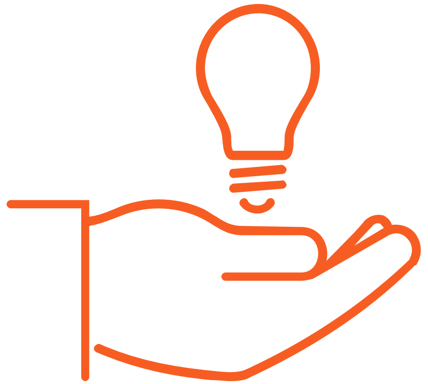
Use Portlet Date Settings

- Click Viewing: Portlet Date Settings settings to calibrate all dashboard analytics, such as KPIs and meters, to the same date comparisons
- Click **Done** to save



Configuring Best Practices

- The KPI portlet should be placed at the top of the center column of the Home Dashboard
- Place KPIs in a logical order
- When using comparisons, the date ranges you set should complement each other
- Use Portlet Date Settings to “change the window” on your KPIs, Meters, and Report Snapshots simultaneously



Now It's Your Turn

01 – Add a standard KPI to the Home Dashboard

02 – Display KPI data graphically and copy/paste to Microsoft Word

03 – Add a KPI Meter to the Home Dashboard

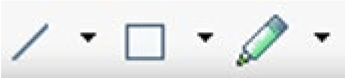
Page 32 in your workbook

Approximately 10 minutes

Checkmark when you are done

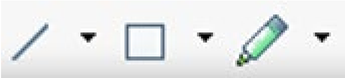
Coffee Cup if away…

Activity: Match Game

Using the Webex line tools  to match the terms on the left to the task/description on the right

Portlet Date Settings	Highlight KPI data that falls above or below
Setup	Positive Change
Standard Report	Drill into underlying report
Threshold	Send to .csv file
Click on period	Change date range for dashboard elements
Change is green	Configure the KPI Portlet
Export	Basis of a Standard KPI

Activity: Match Game

Using the Webex line tools  to match the terms on the left to the task/description on the right

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Click on period	Change date range for dashboard elements
Change is green	Configure the KPI Portlet
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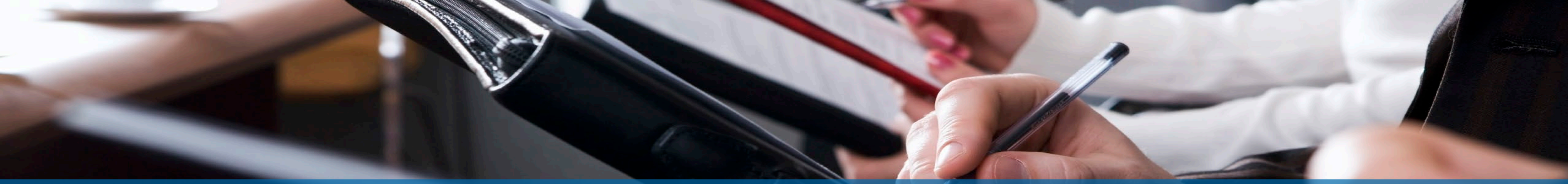


SuiteAnalytics: Reports and Searches

Module 06: Creating Saved Searches

Page 36 in your Student Guide

NETSUITE | SuiteTraining

About This Module

Saved searches can highlight critical data and facilitate business process flows:

- Allowing new lead records to be updated quickly
- Identifying specific groups of customers to be targeted for campaigns
- Identifying customers who have overdue payments

In this module, we examine how to:

- Define saved search criteria and results
- Use highlighting and filters to make information obvious and manageable
- Export, email and add saved searches to Home Dashboards to share information and make it more accessible

Module Objectives

1 Define saved search criteria and results

2 Add images, colors and other formatting options to results

3 Add filtering options

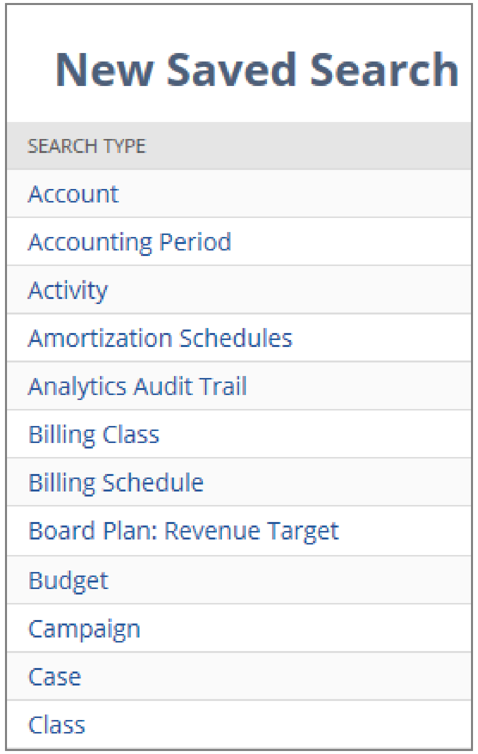
4 Export and email saved search results

5 Add saved search to the Home Dashboard

Why a Saved Search?

When you need to:

- Create a dynamic list of results
- Incorporate criteria-based row highlighting to alert users to specific data
- Use complex formulas to obtain specific results from your data
- Expose saved search results in lists
- Create a custom KPIs
- Build KPI Scorecard components



Walkthrough: Constructing a Saved Search

1. Start a saved search
2. Define criteria
3. Choose results
4. Save and view

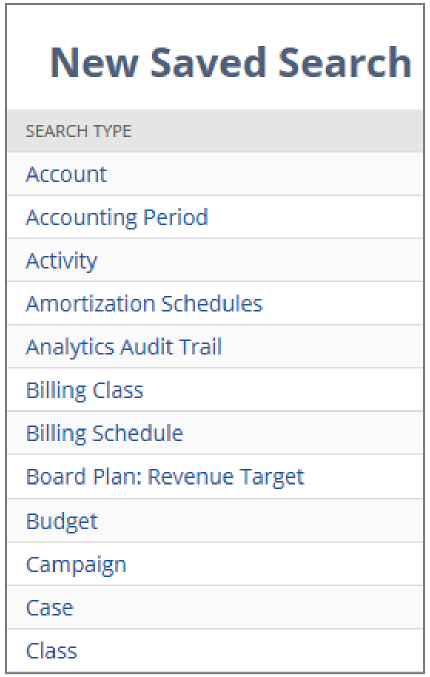
1. Start a Saved Search…

Start from multiple ways:

- Reports > Saved Searches > All Saved Searches > New
- Lists > Search > Saved Searches > New
- Transactions > Management > Search Transactions > Saved Searches > New

Select the record-based search type:

- Both standard and custom record types are available
- Available types depend upon you role’s permissions

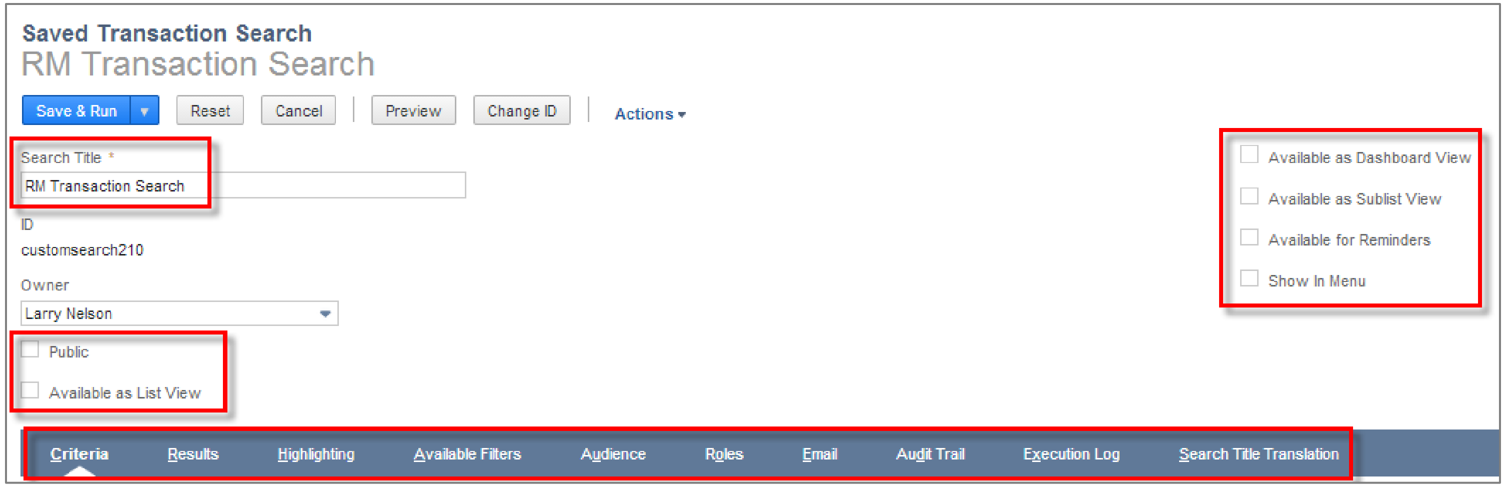


TIP! If your search involves any transaction data, start with a transaction type of search. It is easier to add entity-based fields to a transaction search, than to add transaction-based fields to an entity search.

1. Start a Saved Search

Add key information:

- Enter a meaningful **Search Title**
- Enter an **ID** to identify creation date or pull into a script
- Select Access Choices options
- Click the Subtabs to go to the different search components

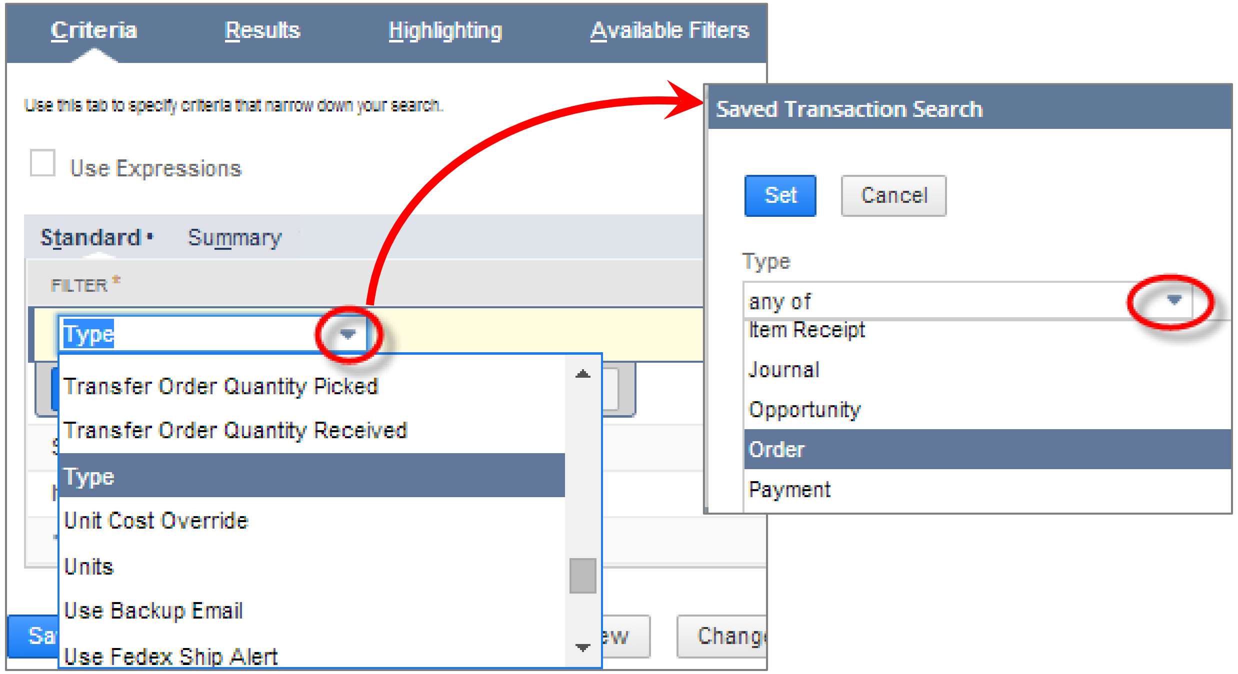


TIP! Prefix your saves search titles with your initials. This will make finding them later much easier.

2. Define Criteria

Go to the Criteria and Standard subtab:

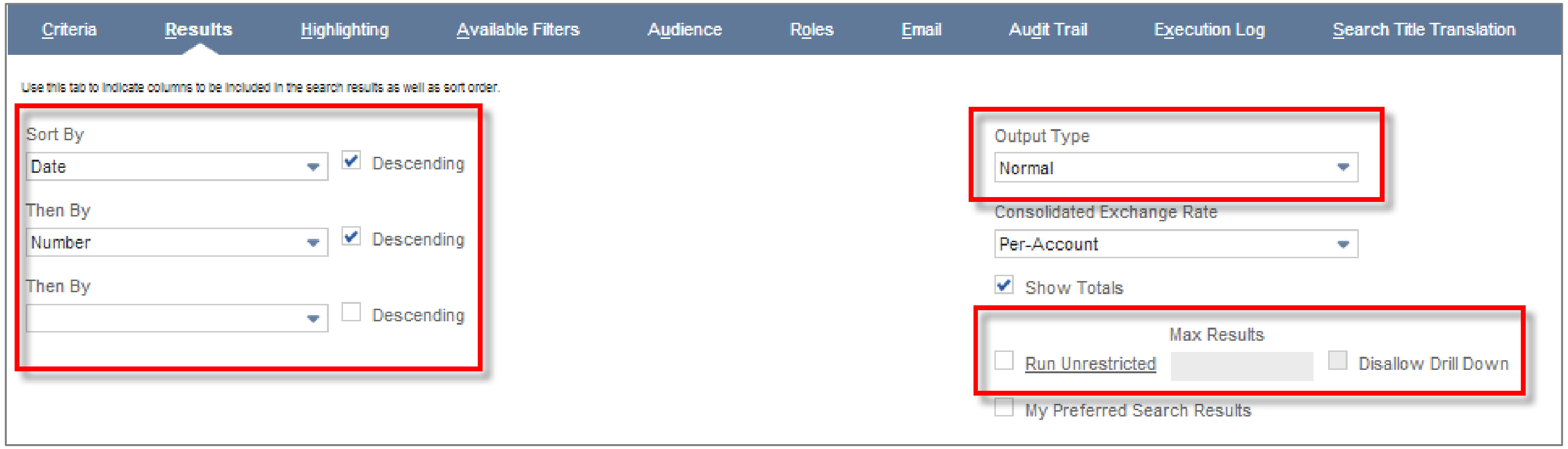
- Select fields from the standard Filter the drop-down list
  - Includes standard and custom fields
- Define field values from the pop-up window



3. Choose Results…

Go to the Results subtab:

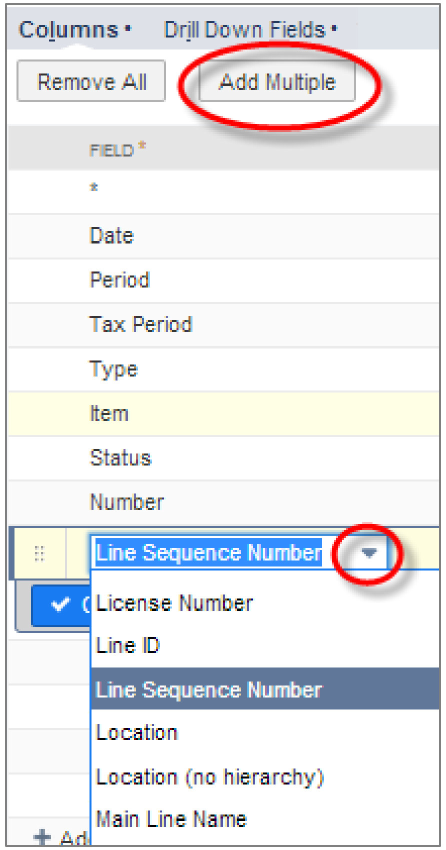
- Specify up to three sorting options
- Select Output Type from the drop-down list
- Check, or not, the **Run Unrestricted** box
  - – Only the Administrator can check the Run Unrestricted box
- Define **Max Results** field for number of records to display
- Check, or not, **Disallow Drill Down** box



3. Choose Results…

Select fields for Column display:

- Add columns by choosing fields, as needed, from drop-down list
- Include your criteria in your results
  - To include line numbers in transaction search results, add the **Line Sequence Number** field

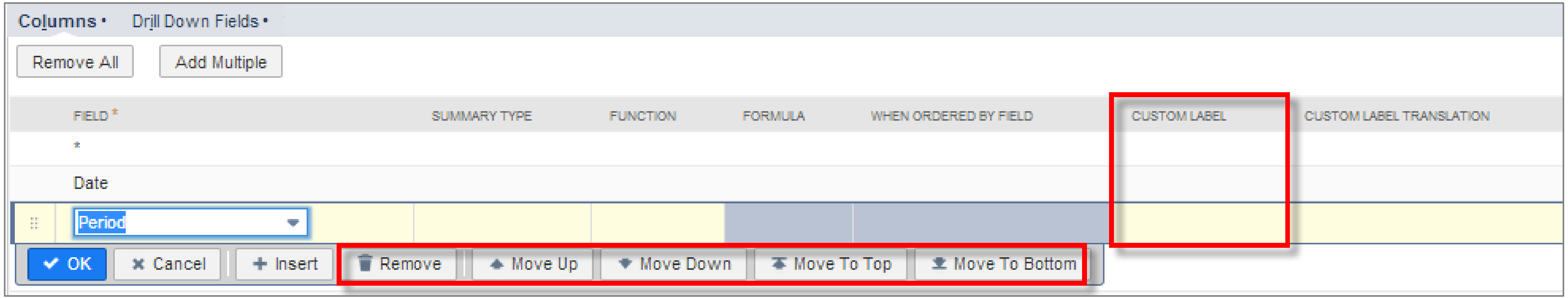


TIP! You can use the Add Multiple button to select several fields from a multi-select, pop-up window. It's faster!

3. Choose Results

Work with Columns:

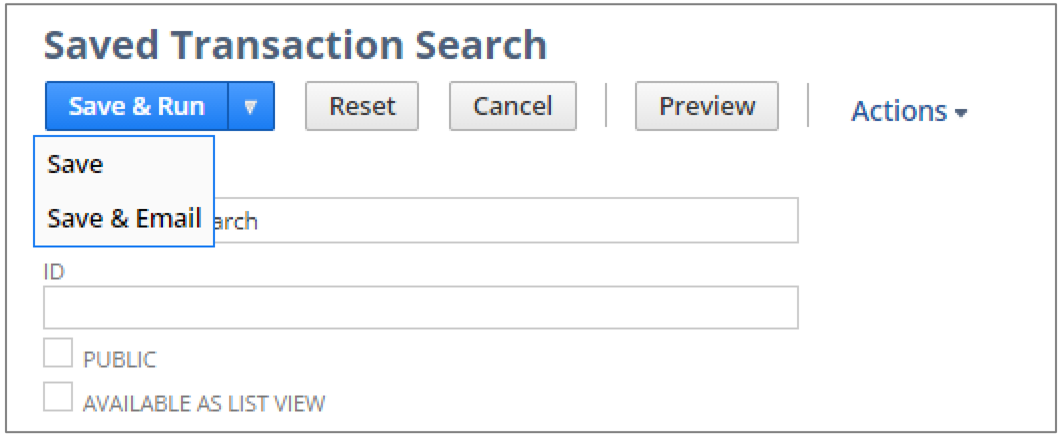
- Remove columns that you do not want displayed
- Reorder columns
- Re-label column headings, if required, using Custom Labels



4. Save and View…

Click **Save & Run** to save and view the results:

- Save often so you do not accidentally lose your work
  - Saving the search saves the search criteria

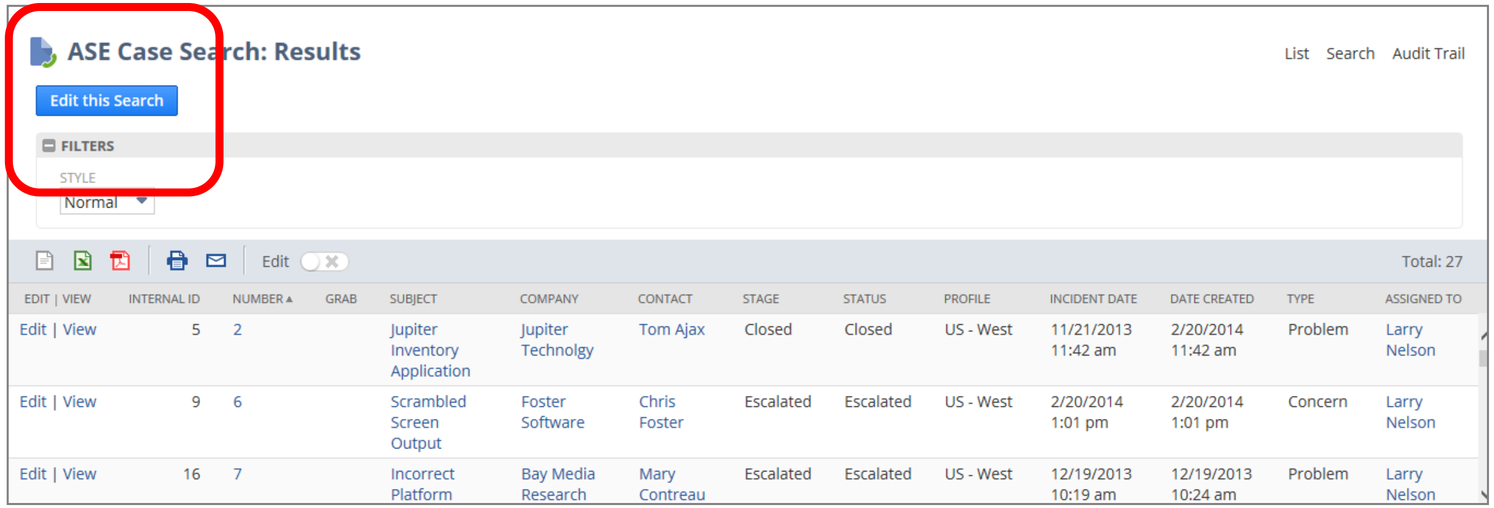


  - Clicking save navigates you away from your saved search, but does not display the results

4. Save and View

View the results, then return to search to edit:

- Each time the search is run, results are refreshed
- Click Edit this Search to edit results
- You can continue to edit and modify the search



TIP! Change how single record results display by going to Home > Set Preferences > Reporting Search and selecting Show List When Only One Result.

Activity: True or False

Use the green checkmark or the red x to indicate if the statement is true or false.

1. You can only create searches for standard records.
2. Customer searches are always the best.
3. Criteria is defined by selecting from a list of standard NetSuite fields.
4. Including criteria in your results is usually a best practice.
5. Save and Run saves the criteria and displays the results.

Walkthrough: Refining a Saved Search

1. Use mainline in transaction searches

2. Include joins

3. Highlight critical information

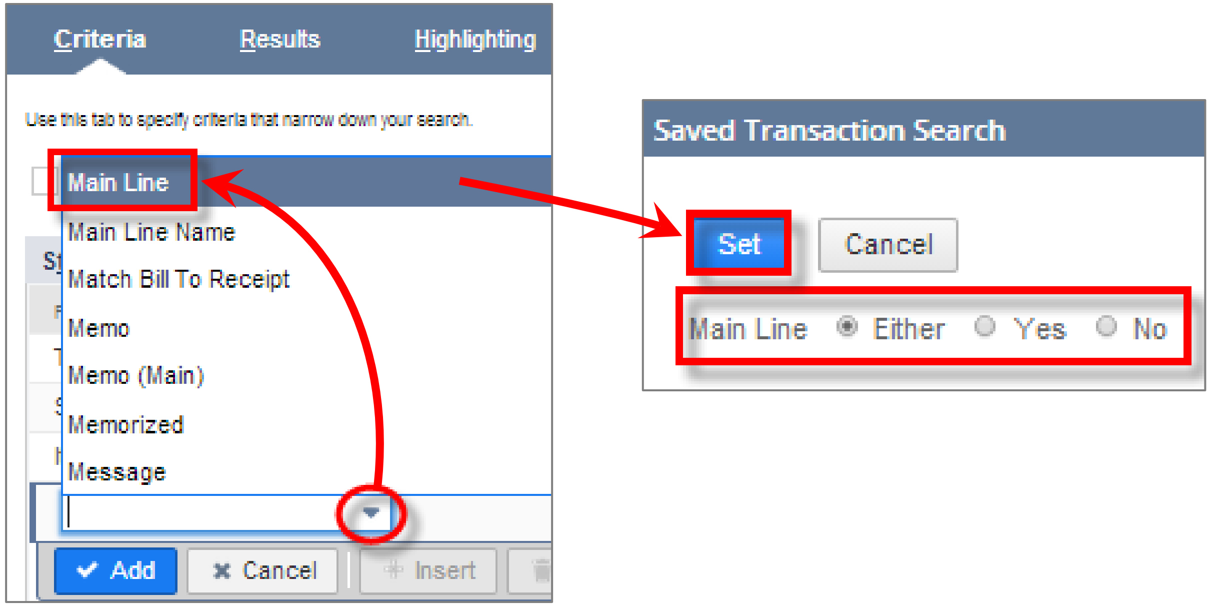
3. Add available filters

1. Use Main Line in Transaction Searches

By default transaction saved searches default to Main Line Either

You can change this behavior:

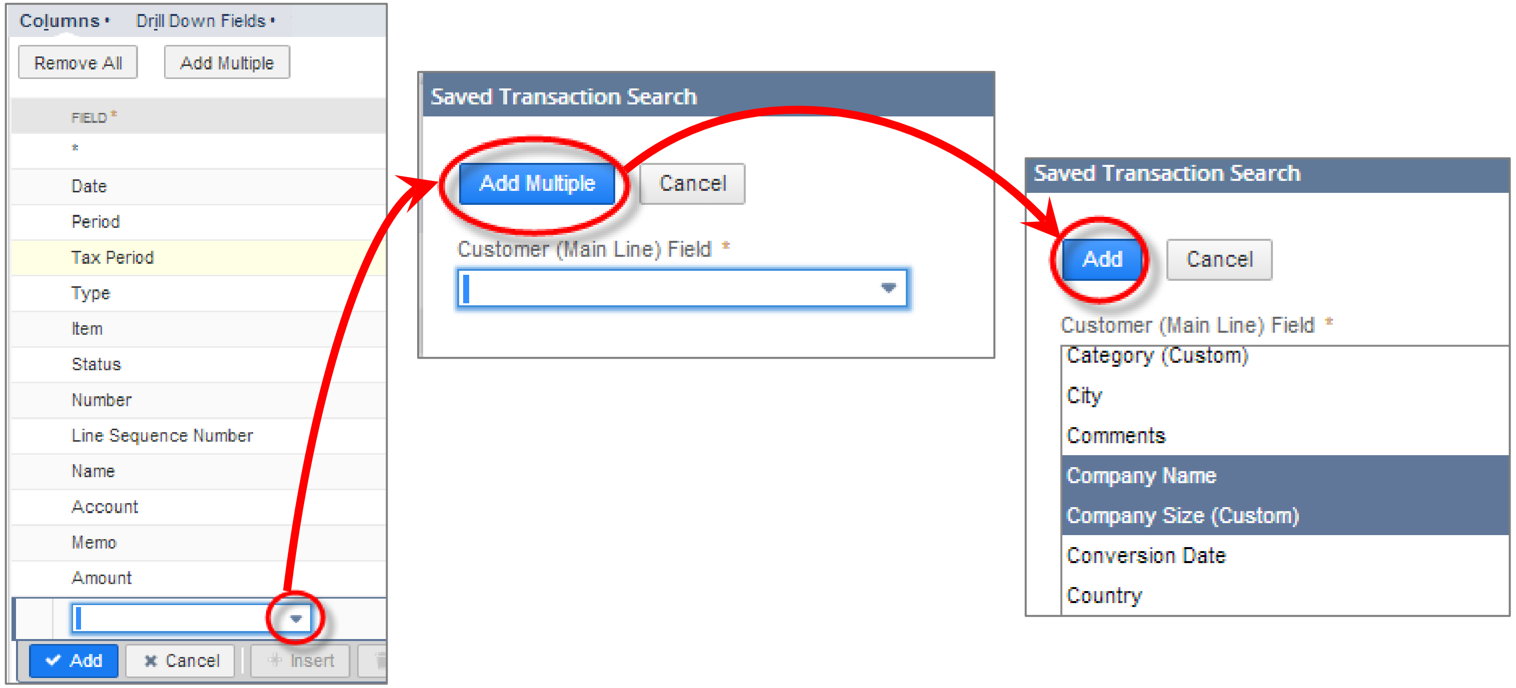
- Select Main Line from the standard Filter the drop-down list
- Define field values from the pop-up window
  - Select **Yes** to return transaction header information
  - Select **No** to return line-level information
  - Click **Set** to register your choice



2. Include Joins

Include joined fields, in search results, to display more details

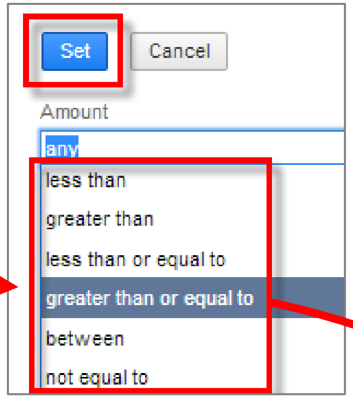
- Joined fields are usually found on record sublists
  - Scroll down to joined fields, indicated by ellipses
- When adding joins, use Add Multiple to select more than one field
  - Select the fields in the pop-up window and click Add

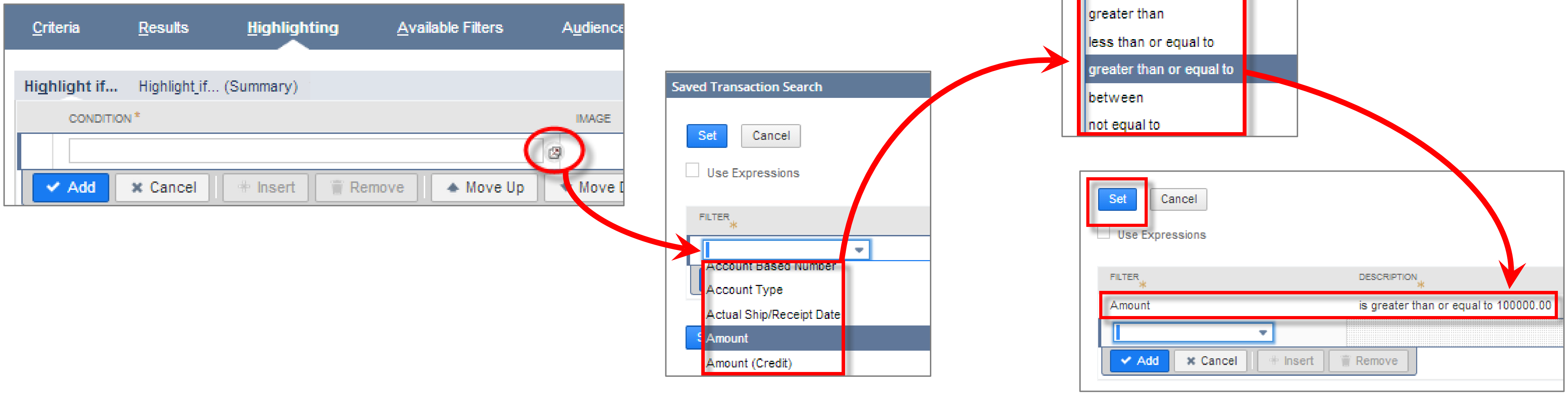


3. Highlight Critical Information…

Select your formatting on the Highlighting and Highlighting if… subtab:

- Select the Highlight if Condition fields from Set Filters icon
  - The condition must be one of the criteria fields in the search
- Select the Filter fields from the drop-down list
- Define the values and click Set, and then Set the filter
- Continue selecting fields as needed

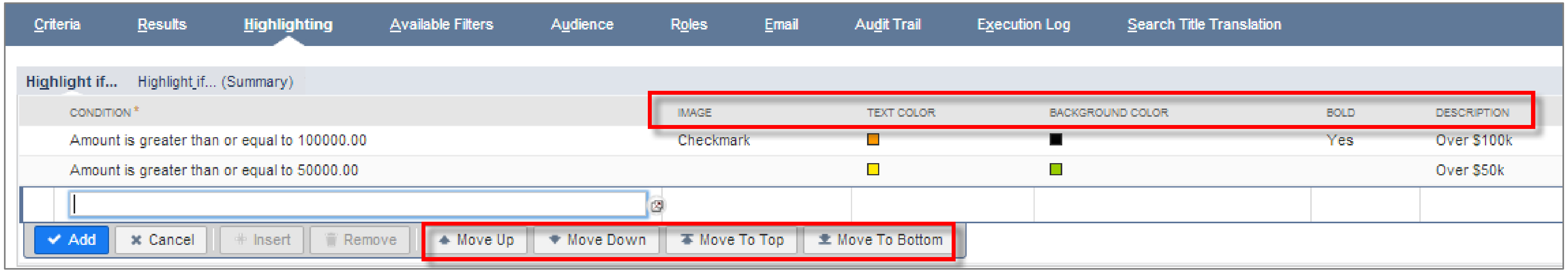




3. Highlight Critical Information

Define the formatting for each condition

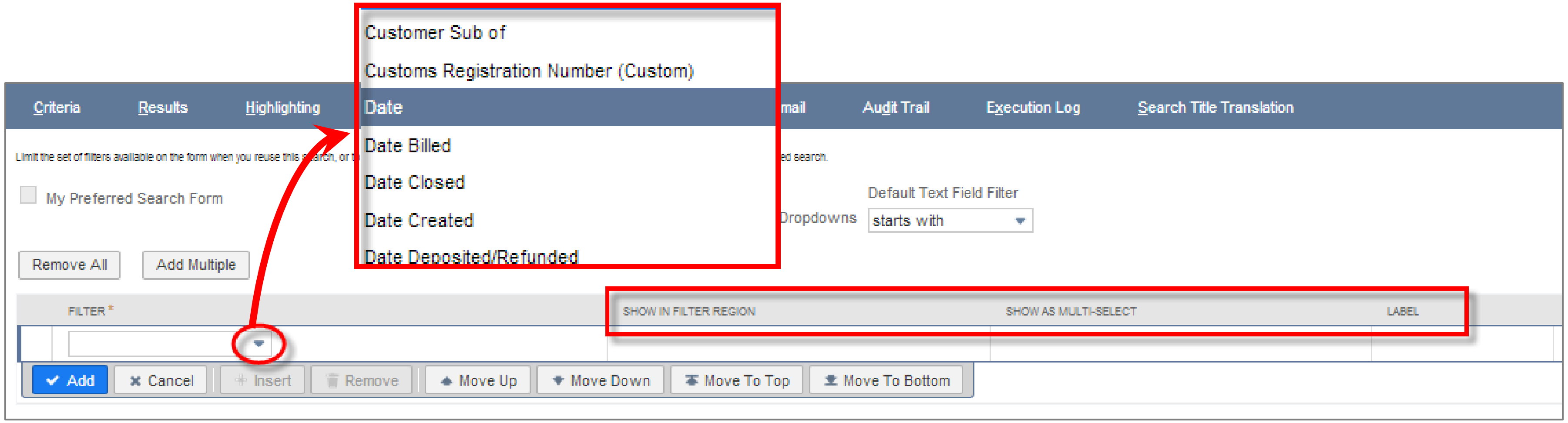
- Each condition has its own formatting
- Conditions are highlighted in the order listed
  - Conditions may be re-ordered using the buttons
- Highlighting applies an if/then statement to the condition
  - For example: **If** amount is less than $50000, **then** text is bold
- Add an Image, Text Color, Background Color, Bold formatting
- Enter a description to add a legend explaining the highlighting



4. Add Available Filters

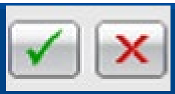
Define filters, on the **Available Filters** tab, allowing users to limit and refine the search results:

- Select the field from the pop-up window or use Add Multiple
- Choose to Show in Filter, Show as Multi-Select (optional)
- Enter an Label (optional)



Note: Filters display in the footers area of the search results.

Activity: True or False

Use the green checkmark or the red X  to indicate if the statement is true or false.

1. Transaction searches default to header-level information.
2. Joins allows you to display more detailed information, pulling information from a related record.
3. I can highlight anything I want, even it if it is not part of search criteria.
4. Available filters allow users to see a subset of the search results.

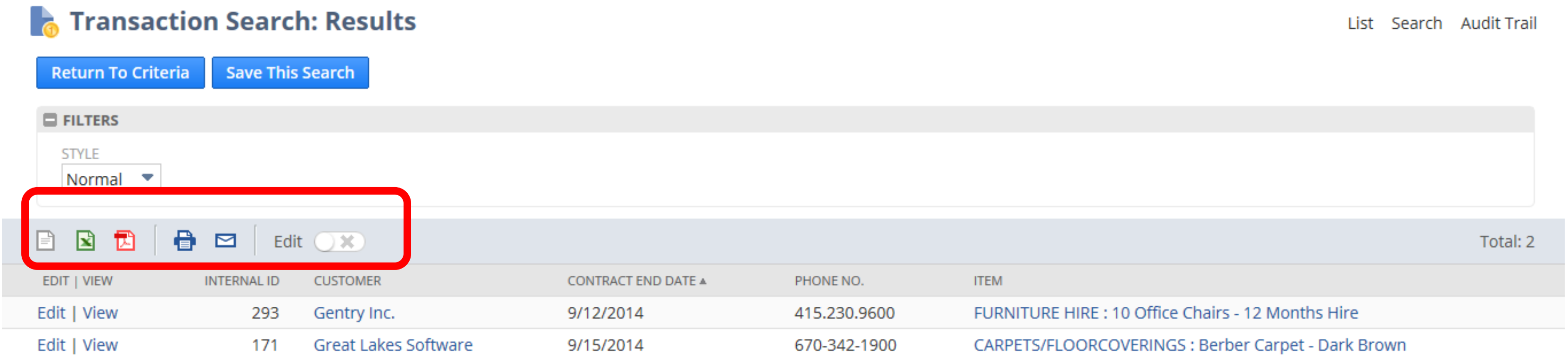
Walkthrough: Share a Saved Search

1. Print, export or email results
2. Track executions
3. Manage Searches via Audit Trail

1. Print, Export or Email Results

Search results may be shared through Print, Export, and Email functions:

- Click Print to print your search results to a local printer
- Choose which Export option you want
  - Export – CSV can be used to export out a file for import to another system
  - Export – Excel facilitates further manipulation and graphing of the data

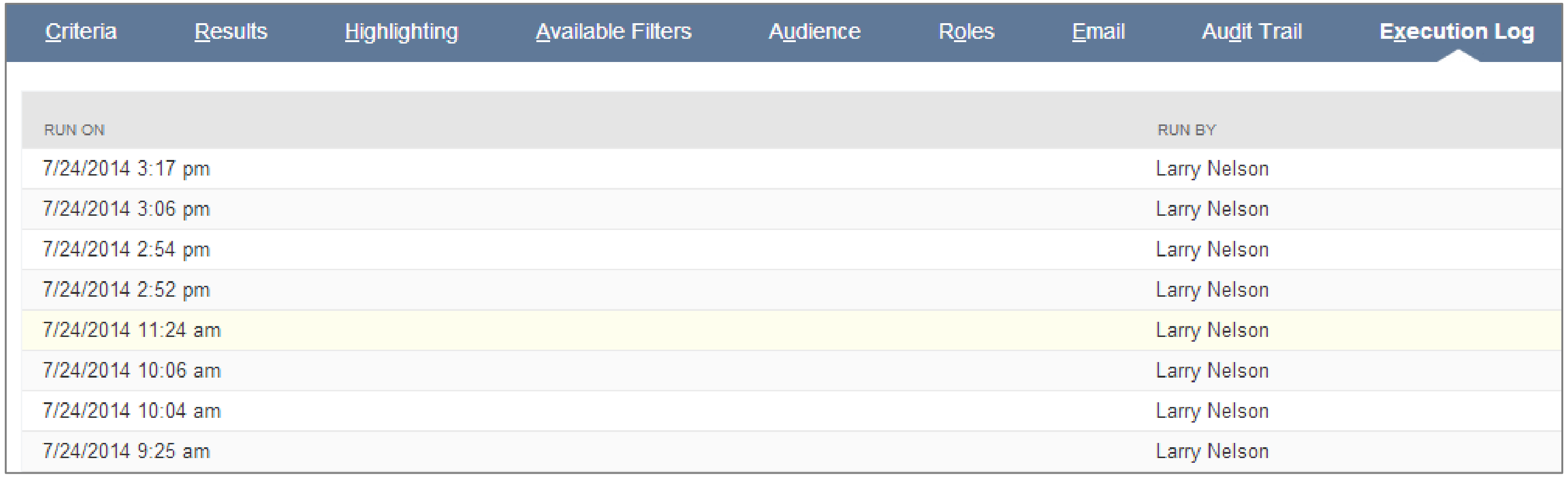


Note: User must have “Export Lists” permission (under Lists) to expose the Export button.

2. Track Search Executions

Edit the search and click on the **Execution Log** subtab

- Track executions and exports of saved searches
- View a history of the last 60 days

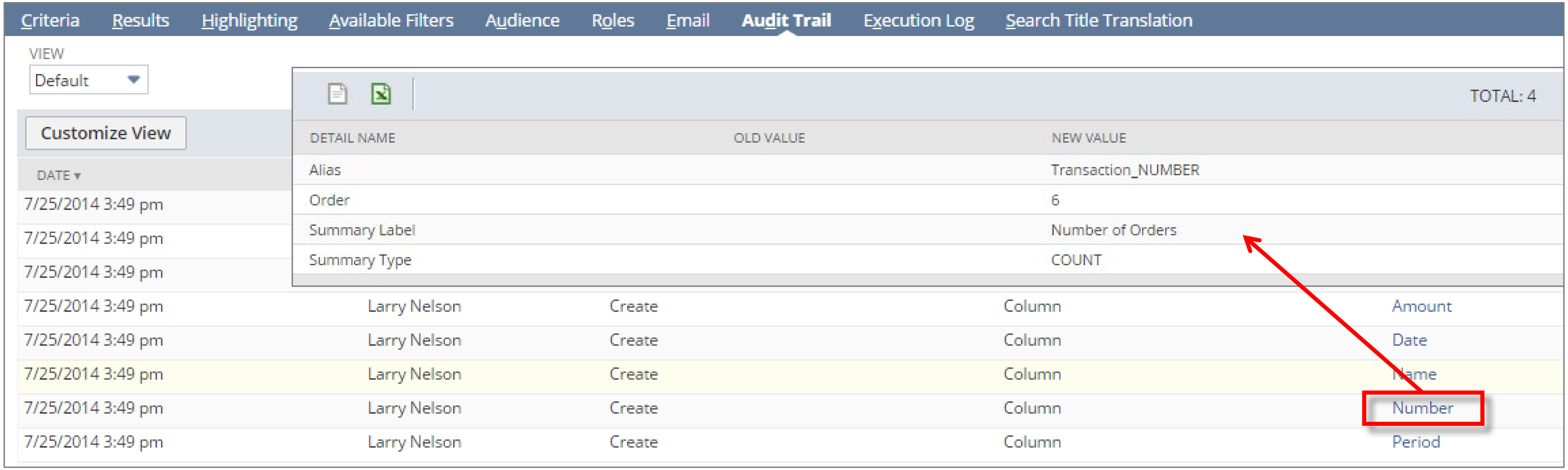


RUN ON	RUN BY
7/24/2014 3:17 pm	Larry Nelson
7/24/2014 3:06 pm	Larry Nelson
7/24/2014 2:54 pm	Larry Nelson
7/24/2014 2:52 pm	Larry Nelson
7/24/2014 11:24 am	Larry Nelson
7/24/2014 10:06 am	Larry Nelson
7/24/2014 10:04 am	Larry Nelson
7/24/2014 9:25 am	Larry Nelson

Note: Only available to Administrators or users with “Publish Search” permission.

3. Searches Audit Trail

- Search properties tracked including top-level options, Criteria, Results, Available Filters, Audience, Roles, Email
- Drill-down onto details which supports expressions and operators



Now It's Your Turn

01 – Create a Saved Search for Inline Editing

02 – Create a Saved Search List for Marketing

03 – Create an Overdue Customers Saved Search

Page 37 in your Student Guide

Take 25 minutes…

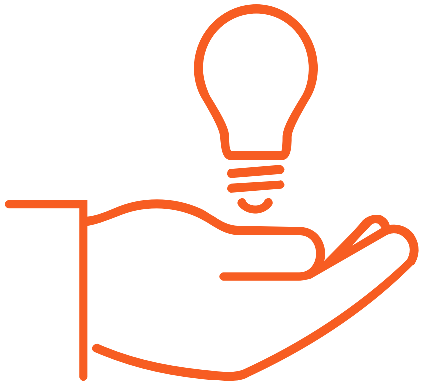
Checkmark when Done

Coffee Cup if away…

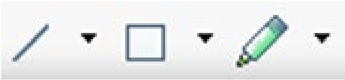
Note: Save your searches as you create them so you do not accidentally lose your search criteria if you navigate to a different page.

Best Practices

- ***Design, design, design***: design your search before you start to construct it
- Determine the required fields for your criteria and results
- Look at records and transactions in NetSuite to familiarize yourself with where data “lives”
- If your search has anything to do with a transaction, start with a transaction search
- Reflect your criteria in your results
- Use Set Preferences to “Show List When Only One Result”
- By using a search (Type = Analytics Audit Trail), you can view properties of searches (and Reports) that have been deleted



Activity: Match Game

Using the Webex line tools  match the terms on the left to the task/description on the right

Joins	Selects header, line-level detail, or both
Criteria	Focus on critical information
Save and Run	Access fields on tables related to main search object
Mainline Setting	Set the display
Highlight if…	What are you looking for?
Results	Save your criteria and display your results

SuiteAnalytics: Reports and Searches

Module 07: Publishing Saved Searches

Page 44 in your Student Guide

NETSUITE | SuiteTraining

About This Module

Now that I can define a saved search, how can I:

- Ensure that only the appropriate roles have access to it?
- Provide users access to the search when and where they need it in the application?
- Guarantee that the saved search results are “actionable” – in other words, can I enforce business process flows and tasks?

This module examines how to publish saved searches so they are:

- Accessible to specific users only
- Viewable from multiple places in the application
- Display results in a way that helps facilitate user action

Module Objectives

1. Identify the data for a saved search
2. Publish saved searches to different application views
3. Show saved searches in a menu
4. Use saved searches as custom dashboard reminders
5. Create saved search emails alerts and scheduled emails

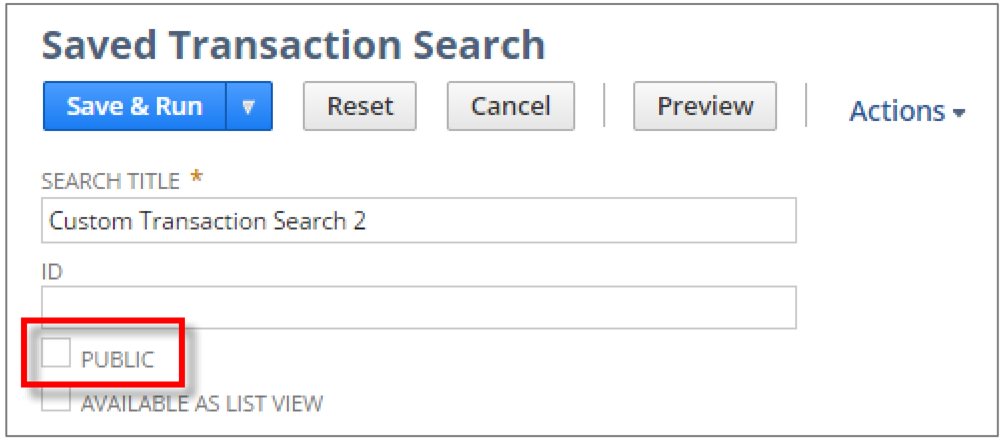
Walkthrough: Defining Access for Saved Searches

- Public Access
- Define Audience
- Allow Audience to Edit

Public Access

Saved Searches can be made available to all users:

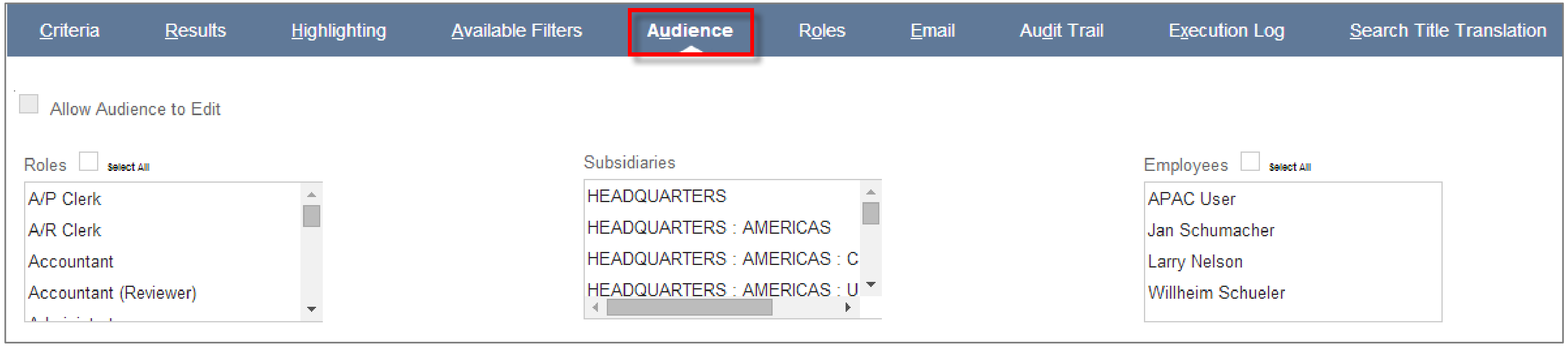
- Select the **Public** check box
- Allow all roles and users access to the saved search
  - **Benefit:** Public saved searches can save employees time and ensure all users conduct searches using the same criteria
  - **Warning:** Too many public saved searches can become overwhelming and difficult to manage



Define Audience

Restrict access to specific audience members:

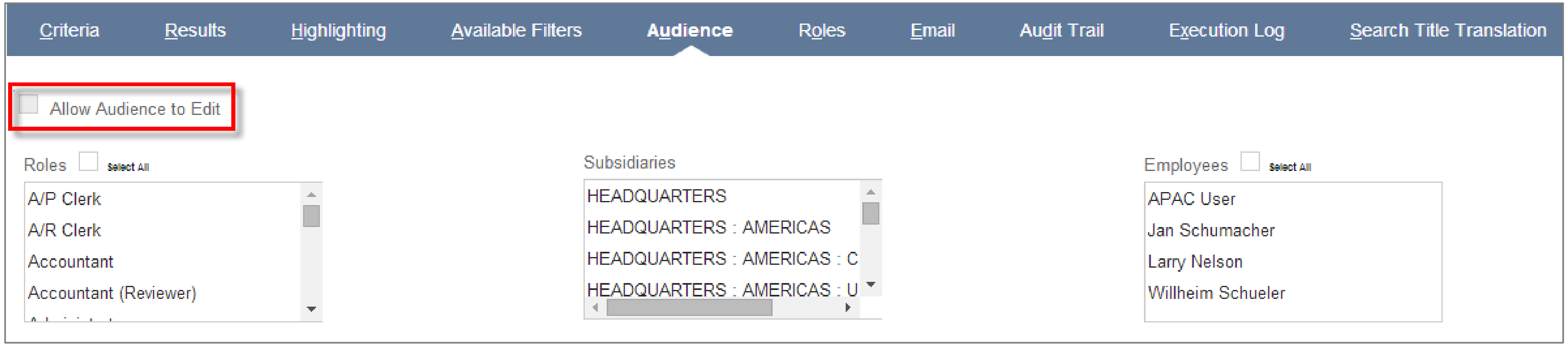
- Go to the **Audience** subtab
- Choose audience restrictions that facilitate minimal maintenance
  – For example: Choose roles instead of individual employees
  – Note: Be aware that if you select both a role and department, then the user must have that role *and* be assigned to the department
- Users must have permissions to the record type and related data to access the saved search



Allow Audience to Edit

Decide how audience member can edit the search:

- Check **Allow Audience to Edit**
  - Users can make changes to the saved search **and** can save it with the same name, i.e. overwriting the search
- **Do not check** Allow Audience to Edit
  - Users can make changes to the saved search **but** must save the search with a new name, i.e. cannot overwrite the search



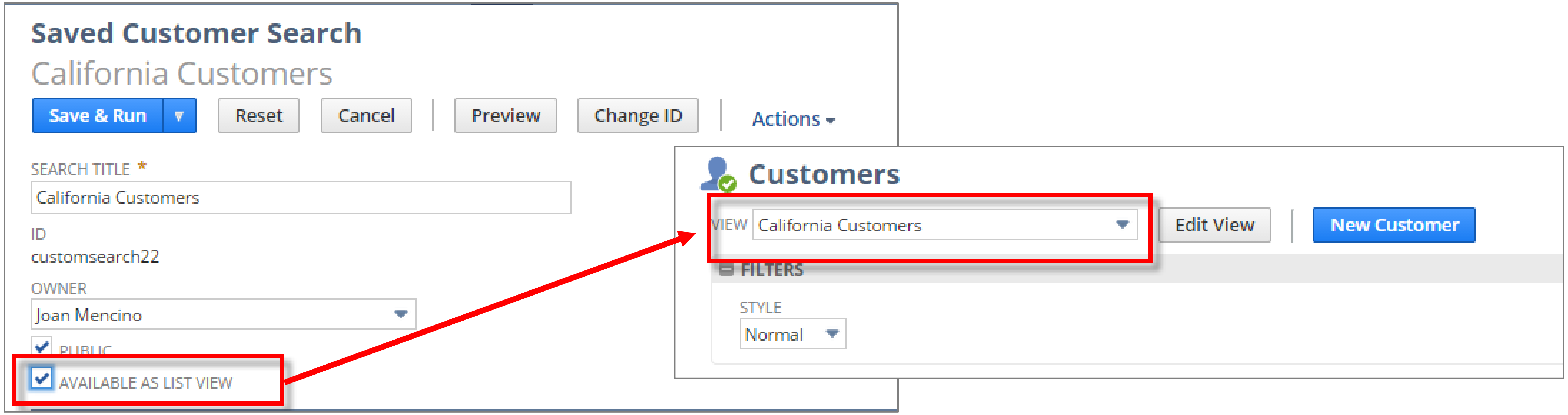
Walkthrough: Provide Different Search Views

- List View
- Dashboard View
- Sublist View
- Publish Search

Available as List View

Allow users to select saved searches from the bottom of list pages for the related record type

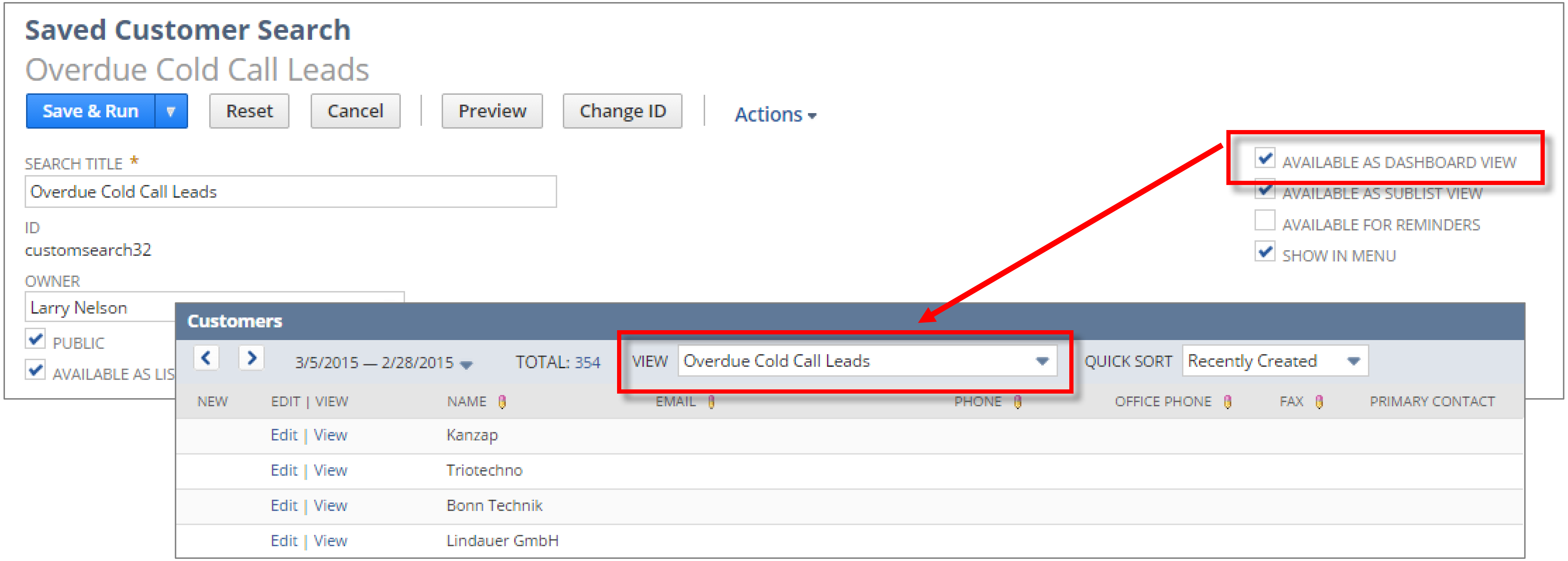
- Check the **Available as List View** box
- Users can then select the saved search from the View dropdown list.



Available as Dashboard View

Available as Dashboard View makes search available in the **List** portlet

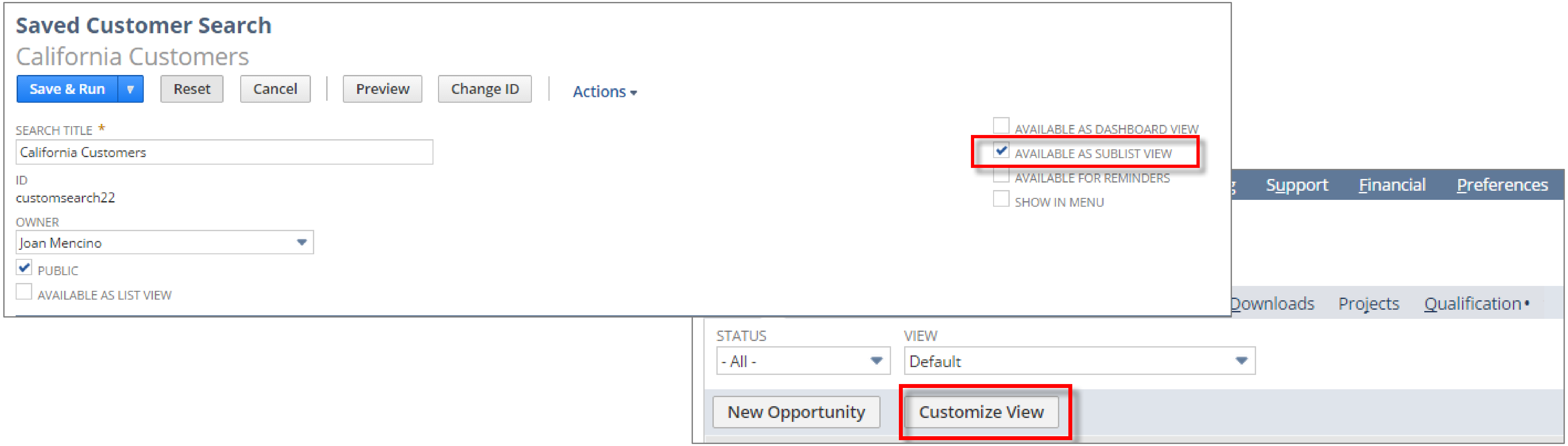
- Add the **List** portlet to the Home Dashboard
- Click **Set Up** and select the saved search record type
- Select the saved search as the **View** in the List portlet



Create Sublist Views: Preferred Method

Provide different information to different roles on sublists:

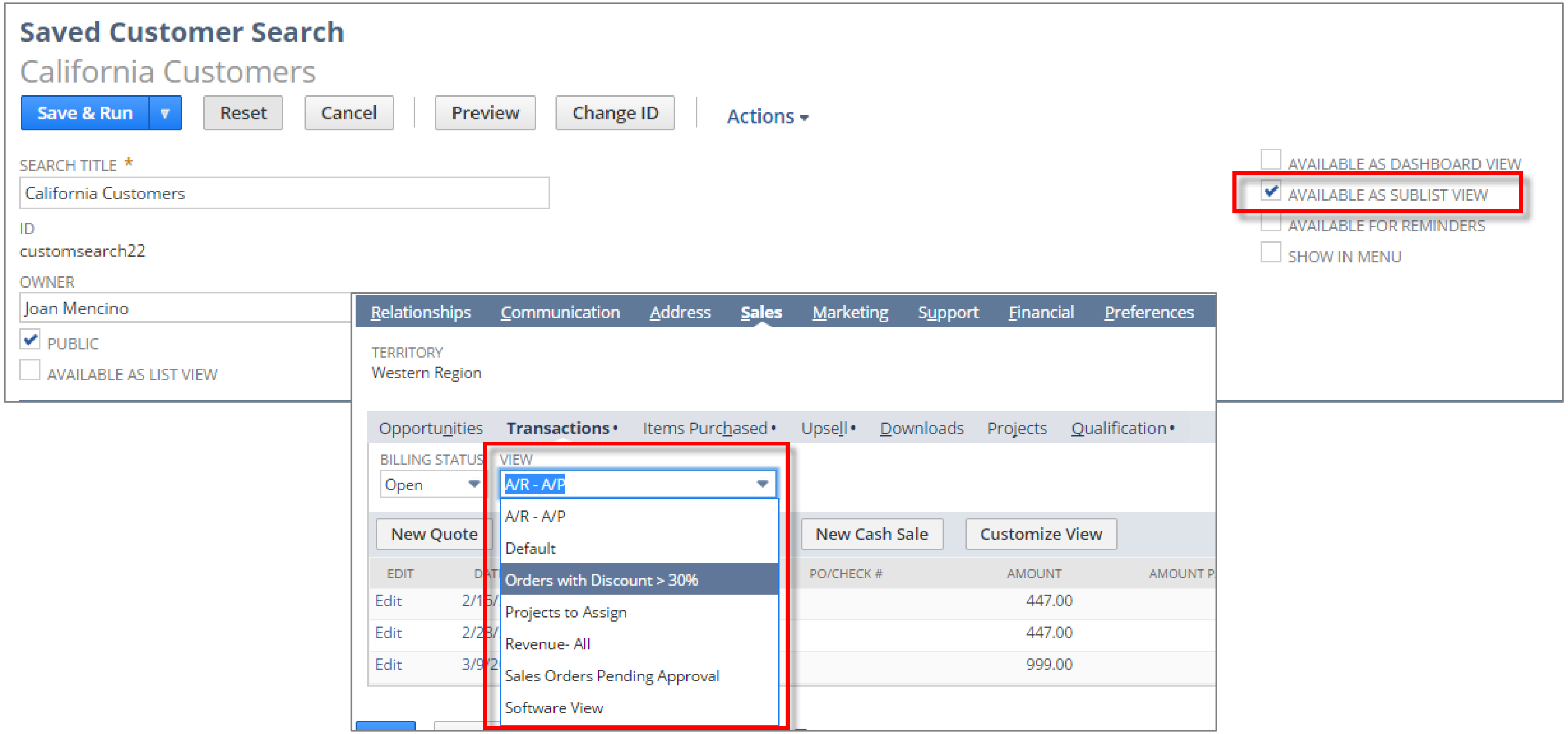
- Go to the record's subtab and then to the desired sublist
- Click the **Customize View** button
- Saved Search displays, choose **More Options** to use full capabilities



Available as Sublist View: Alternate Method

Saved searches can be used to present a custom view of a sublist on a record subtab:

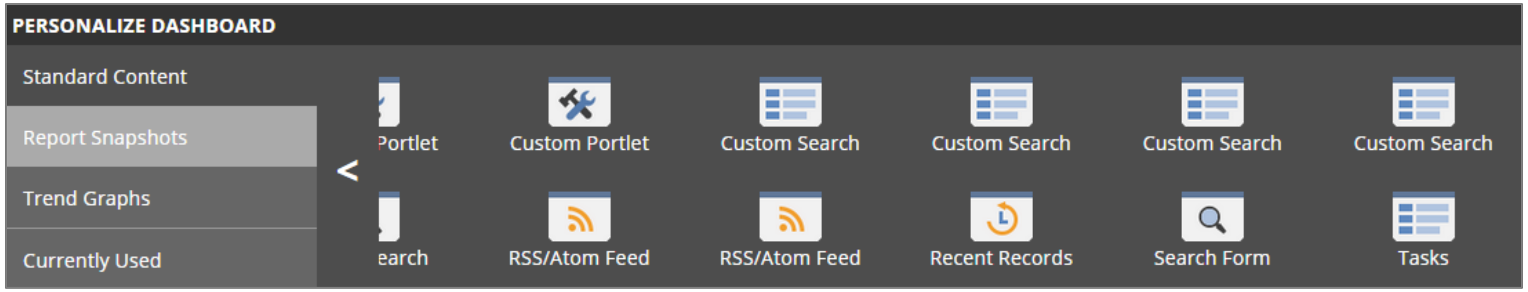
- Check the **Available as Sublist View** box so users can select the saved search from the View dropdown list on a subtab of a record.

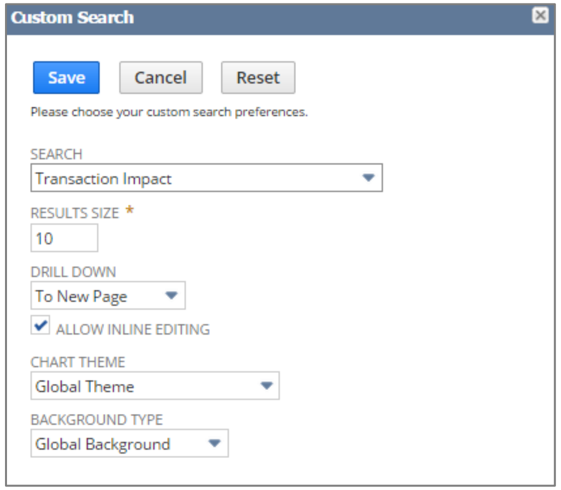


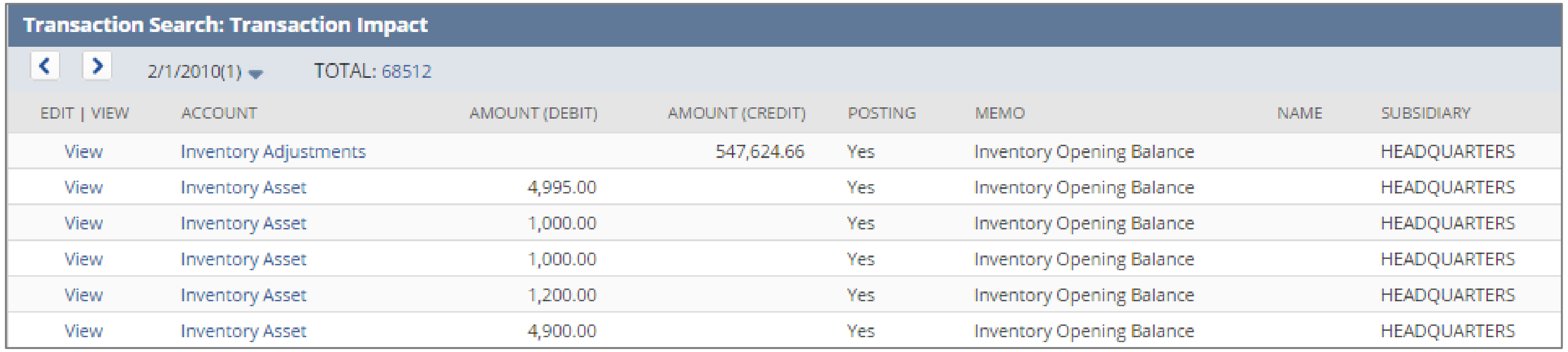
Publish Search

Saved searches may be added to the Home Dashboard:

- Go **Home** and click the **Personalize** link
- In the **Standard Content** panel, select up to six custom search portlets
- Close the panel
- Click **Set Up** in each Custom Search portlet and select your search







Transaction Search: Transaction Impact

2/1/2010(1) TOTAL: 68512

EDIT | VIEW	ACCOUNT	AMOUNT (DEBIT)	AMOUNT (CREDIT)	POSTING	MEMO	NAME	SUBSIDIARY
View	Inventory Adjustments		547,624.66	Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	4,995.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	1,000.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	1,000.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	1,200.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	4,900.00		Yes	Inventory Opening Balance		HEADQUARTERS

Activity: True or False

Use the green checkmark or the red X to indicate if the statement is true or false.

1. Checking **Public** makes the saved search available for all roles, departments, etcetera?
2. If **Allow Audience to Edit** is checked, then the user working with that saved search must save it with a new name.
3. Check **Available as Dashboard View** to allow the saved search to reside in one of the six (6) Custom Search portlets.
4. Users can customize their view of sublists.

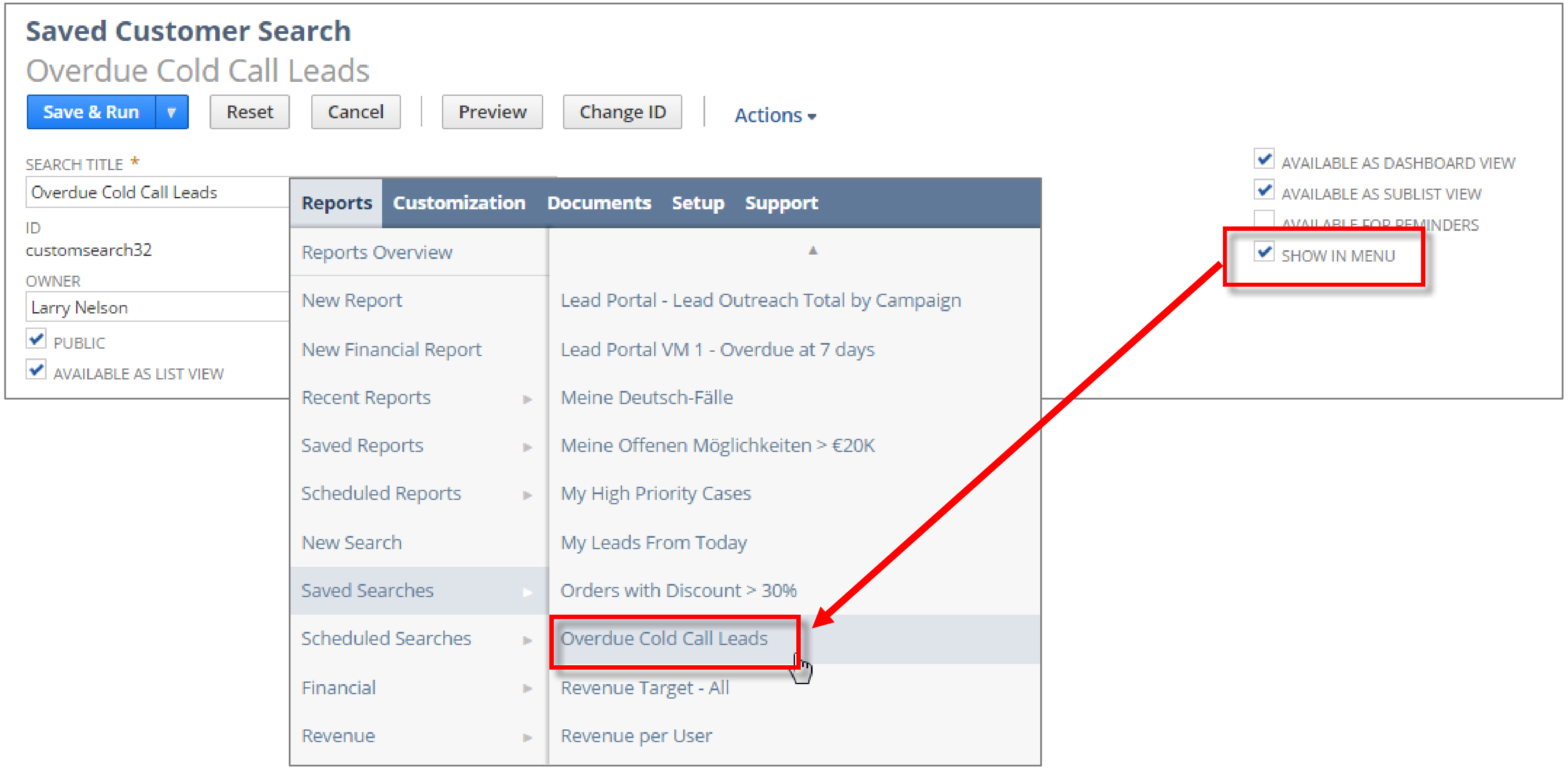
Walkthrough: Enforce Business Process Flows and “Action”

- Create Links in Menu Paths
- Create Custom Reminders
- Create Email Alerts
- Set Up Scheduled Emails

Show in Menu

Create a link in the menu paths:

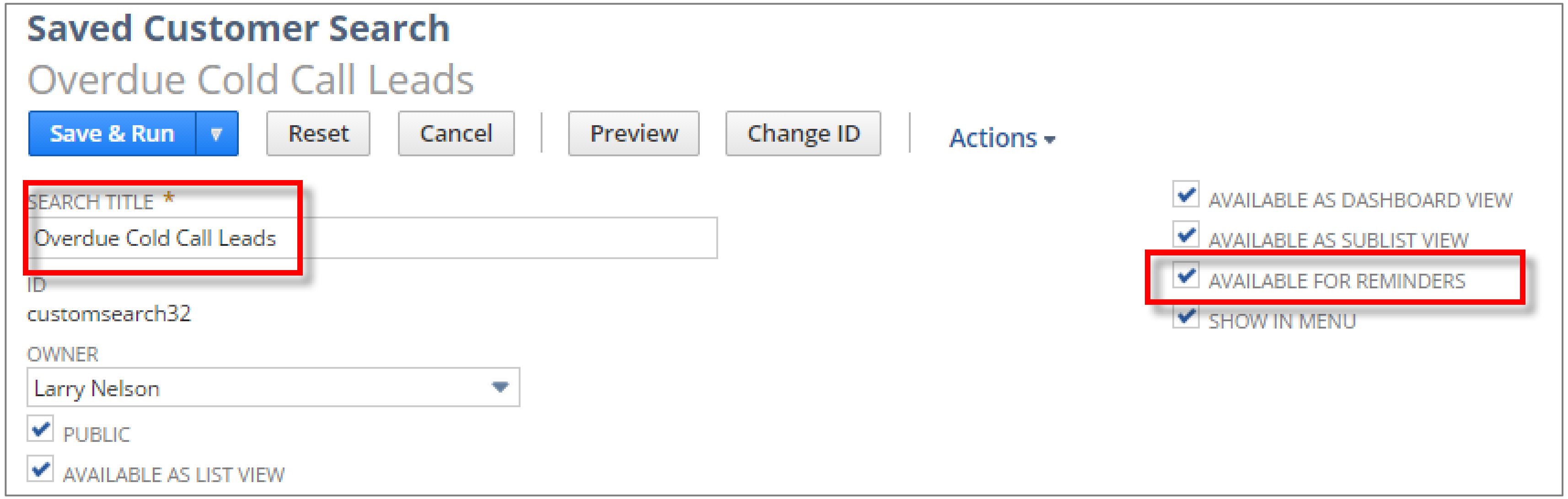
- Check the **Show In Menu** box
  - Saved searches available from the **Reports** > **Saved Searches** menu

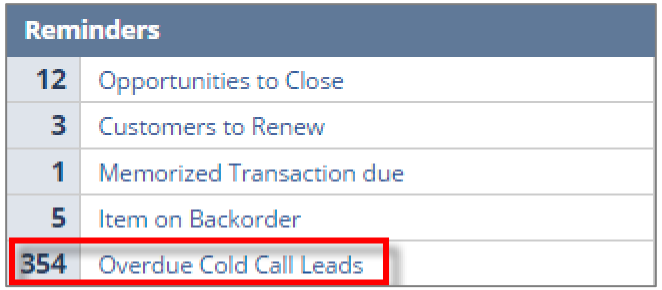


Custom Reminders

Base custom reminders on the number of results from a saved search:

- Name the saved search to reflect an appropriate reminder name to be displayed in the Reminders portlet
- Check the **Available for Reminders** box to make the saved search available from the Reminders portlet
- Click the **Set Up** in the Reminders portlet to add the saved search to the Reminders portlet list
- Drill down on custom reminders to view the results

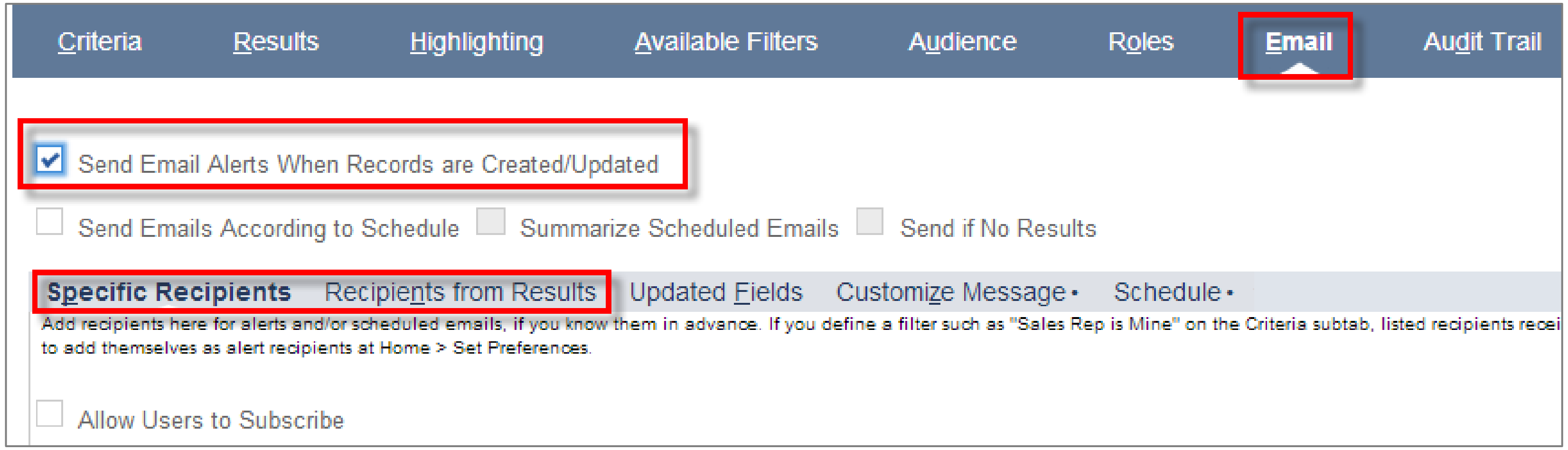




Create Email Alerts

Improve job function or business process flow by notifying users, automatically, about records being created or updated:

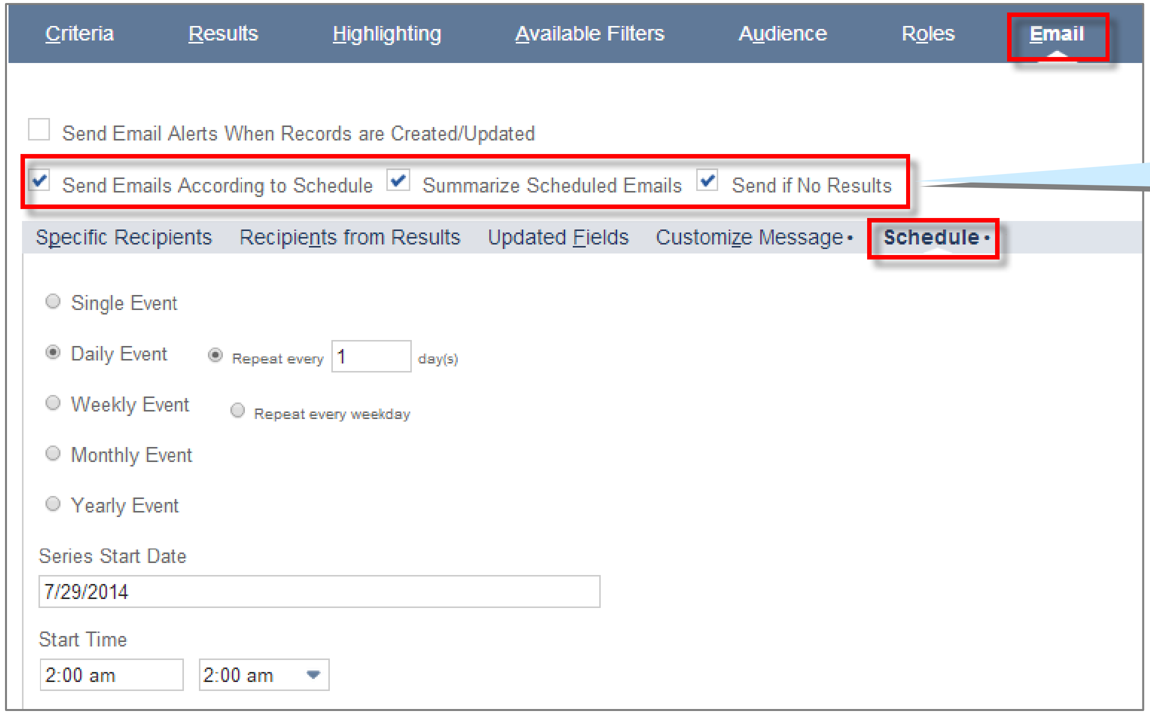
- Enable email alerts when records are created/updated
- Enable the **Send on Update** option to include updates, as well as adds, in email alerts to the recipients
- Send alerts when specific field values change
- Check **Include View Record Link** to display record links in email alert messages



Set Up Scheduled Emails

Send Scheduled Emails, with results relevant to the user, on a regular basis

- Select **Send Emails According to Schedule**
- Specify frequency for Scheduled emails with matching results are sent
- Display saved search results as an attachment or within email message

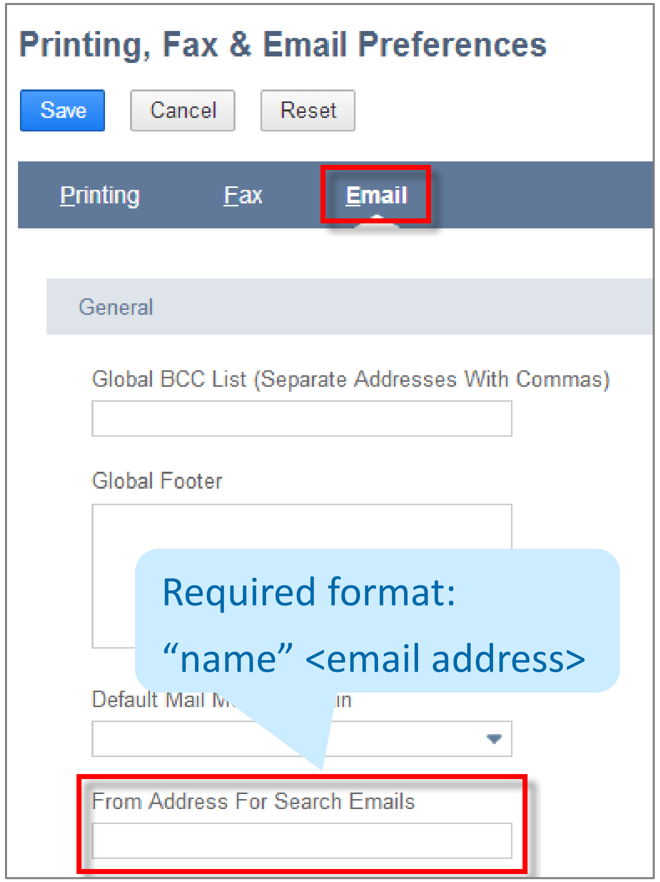


Deselect to prevent sending emails for saved searches without results

Change Default Saved Search Email Sender

By default, saved search emails are sent from the search owner’s email address. Alternatively, you can:

- Set the **From Address for Search Emails** preference to define the email address of your choice as the default sender for all saved search emails
  - **Setup > Company > Printing, Fax & Email Preferences > Email** subtab
- Define a non-default sender for a saved search email to override the email address set in the company preference, for that search only
  - Edit the search and go to the Email subtab > Customize Message subtab, and then enter the email address in the **From** field

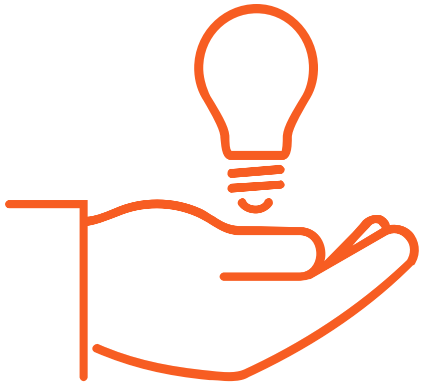


Email Alerts vs. Scheduled Emails

Feature	Email Alerts	Scheduled Emails
DELIVERY		
Sends emails when specified records are created/changed	X	
Sends emails on a scheduled basis containing relevant search results		X
RECIPIENTS		
Specific Recipients tab defines individual person(s) or group(s) to receive emails	X	X
Allow users to subscribe to the email	X	
Recipients derived from results fields	X	X
MESSAGE		
Updated Fields. If used, specific fields and/or changes in field values are required to produce an email alert	X	
Customize email message content	X	X
Customize message for Single Record Results	X	X

Best Practices: Email Alerts and Scheduled Emails

- Enable Allow Users to Subscribe to allow other users, not identified as recipients, to subscribe to saved search alerts
- Schedule a large, saved search to prevent it from timing out
- Use both email alerts and scheduled emails on the same saved search, if necessary/desired
- Schedule searches to run the following day if you want the search to include information up until the end of a particular day (it’s likely that you will also have to set date parameters in your search criteria)



Now It’s Your Turn

01 - Add filters and restrict access to a saved search

02 - Create a saved search for a sublist view

03 - Create a saved search with an email alert

04 - Add a saved search email to an existing search

05 - Create a saved search (Email Alert & Scheduled Email)

Page 45

About 40 minutes

Checkmark when done

Coffee cup if away…

Activity: Match Game

Using the Webex line tools  match the terms on the left to the task/description on the right

Audience	Select saved search in List portlet
Available as Dashboard View	A list of records related in some way to the record being viewed
Sublist	Sends emails on a regular basis
Email Alerts	Users who have been given access to the saved search
Available as List View	Select view from a list of records
Scheduled Emails	Notify users about records being created or updated