



NETSUITE OPENAIR REPORTING

Course Description

Do you need to proactively identify resource utilization, project creep or cost over-runs and margin loss in time to get a project back on budget?

With NetSuite OpenAir, you can obtain real-time visibility into key project-based metrics to increase efficiency and profitability company-wide.

In this two-day course, you will examine NetSuite OpenAir reporting basics and acquire the core skills needed to perform custom calculations, create custom tabular fields and publish dashboard charts. Additionally, you will explore the impact of dates and data stamping, and examine the financial and resource forecasting options.

Key Tasks

How do I:

- Create and use crosstabbed, tabular and pre-built template reports?
- Configure reports on specific date ranges?
- Add sub-totaling, detail fields and filtering to reports?
- Analyze what reports are standard and provisioned in my initial production account?
- Build 'suggested' reports in my production account?
- Use controlled custom fields, custom detail fields and calculations to capture important business metrics?
- Configure advanced reports for budgeting, billing and recognition by configuring charge projections?
- Analyze and extract NetSuite OpenAir data to obtain important company metrics through reporting and dashboards?

Through interactive teaching, a case study and hands-on exercises that you will complete in a provided demo account, you will apply a methodology for using OpenAir's highly configurable reporting capabilities and practice techniques for better resource planning.

Who Should Attend

- NetSuite OpenAir administrators, business data analysts, project managers and super-users responsible for setting up, configuring and maintaining reports.
- New and experienced users looking to develop their skills for creating historical reports, forecasts and projections.

Day 1 Agenda

Reports Manager Navigation and Overview:

Navigate through OpenAir's Reports Manager application, understand reporting terminology and the process for searching, editing and report creation.

Build Crosstabbed Reports: Explore and become familiar with the crosstabbed provisioned reports, the options and configurations of historical reporting.

Build Tabular Reports: Build standard tabular reports, the options and configurations for historical reporting.

Self-Paced Content:

- Review OA Administration Guide (Reports section).
- Review OA Reporting Quick Reference Guide.

Related Course

Take this course for more training:

- OpenAir Essentials

SuiteAnswers

Get answers to your support and training related questions:

- Search for New Feature Training answers to learn about the latest OpenAir release functionality.

Live Training Webinars

Participate in 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.

- Review OA/Standard Reports Guide.
- Create reports in your production account.
- Gain an understanding of OpenAir's database.

Day 2 Agenda

Build Customized Reports:

- Examine how to create basic report customizations.
- Modify the built-in reporting value names to match your organization's terminology.

Build Advanced Reports: Examine the pre-built advanced reports and learn how to modify them to build customized reports for your organization.

Self-Paced Content:

- Review OA/Standard Reports Guide
 - Suggested customized reports
- Create customizations in your production account.
- Review how to distribute reports in order to run and share reports, use report filter set overrides, schedule reports, file and organize reports, and display report results on the dashboard.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite OpenAir 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 OpenAir account.

