



NetSuite: Administrator Fundamentals

Course Description

Are you a newly hired administrator who needs to quickly learn how to manage an existing NetSuite account? Are you mostly self-taught in need of refresher training on basic tasks?

Learn how to manage a NetSuite account like a pro! Become more proficient by gaining insight into a “day in the life” of a NetSuite Administrator.

Administrator Fundamentals examines key administrator tasks and responsibilities to provide the foundational knowledge needed to tailor, maintain and optimize NetSuite for your users’ business needs.

The course begins with a high-level review of NetSuite capabilities before turning to the daily setup, configuration and customization tasks that are part of an administrator’s core responsibilities. The course concludes by exploring best practices and techniques for ensuring the ongoing optimal use of your NetSuite system.

Who Should Attend?

- New and experienced administrators who are responsible for the day-to-day maintenance and optimization of their organization’s NetSuite account.

Key Tasks

How do I:

- Customize NetSuite to better meet our needs?
- Set up and manage users?
- Give groups of users a common view of NetSuite and provide them with a common landing page?
- How do I use administrator tools to facilitate data migration into NetSuite from an external source?
- Prepare for NetSuite upgrades and releases, secure our account, and extend NetSuite capabilities?

Prerequisites

- Course participants should be familiar with NetSuite navigation and features. To learn how to navigate NetSuite and perform common tasks, view the Getting Started videos available on SuiteAnswers.

Agenda

Through case study, use cases, hands-on exercises and best practices discussions, you will learn how to:

- Effectively work in the administrator role and complete key tasks.
- Identify NetSuite capabilities and the general database structure.
- Consider standard roles and permissions, and their relationship to data security.
- Create custom elements to tailor the user interface, control views and create new tables.
- Modify and create custom roles to enforce security.
- Design and publish custom dashboards to user groups, leveraging the SuiteAnalytics solutions.
- Import data and ensure data integrity in your NetSuite account.
- Identify resources to assist with upcoming NetSuite upgrades and releases.
- Apply techniques for securing your data and system.
- Expand NetSuite functionality by taking advantage of SuiteApps.

In key topic areas, attendees are also asked to use homework assignments to research configuration and customization in their production accounts to gain a deeper understanding of how their NetSuite account has been tailored and managed.

Related Courses

Take these courses for more training:

- SuiteCloud: Exploring the NetSuite Platform
- SuiteAnalytics: Financial Reports and Searches
- SuiteFlow: Workflow Fundamentals

Day 1 Agenda

Beginning – Set baseline knowledge about the Administrator tasks and NetSuite.

- **Administrator Role and Tasks:** Review and clarification of the administrator role and key tasks.
- **NetSuite Overview and Record Types:** Examine the breadth of NetSuite capabilities and its database structure that is based on record types.
- **NetSuite Roles and Permissions:** Consider the purpose of NetSuite standard roles and permissions regarding data access and security.

Customizing – Learn to create custom elements in the user interface, manage roles and create custom roles, and design custom dashboards.

- **Create Subtabs, Lists and Fields:** Introduction to the SuiteCloud platform, and use SuiteBuilder to create subtabs, lists and fields.
- **Create Custom Forms:** Continue with SuiteBuilder to create custom forms to meet company requirements.
- **Create Custom Records:** Create custom records to meet company requirements.

- **Create Custom Roles:** Provide users with the precise set of permissions to do their daily job.
- **Create Custom Dashboards:** Design and publish dashboards to groups of users, which leverage SuiteAnalytics solutions.

Day 2 Agenda

Managing – Effectively manage the data in your NetSuite Account. This includes importing in data and ensuring the integrity of that data.

- **Migrate Your Data:** Introduce Import Assistant, prepare data for import, file formatting guidelines, data handling options, and migrating customer, vendors and partners.
- **Data Integrity:** Mass updates and duplicate detection and merge.

Managing – Ongoing use and running of the account can include preparing for NetSuite upgrades or releases, paying attention to security and consider extending NetSuite’s capabilities.

- **Upgrade and New Release Preparation:** Identify the upgrade/new release process and related administrator tasks.

SuiteAnswers

Get answers to your support and training related questions:

- Go to Videos to find related self-paced training.
- Take New Feature Previews to learn about the latest NetSuite release.

- **Security:** Consider best practices for ensuring user, account and system security.
- **Migrate Your Data:** Introduce Import Assistant, prepare data for import, file formatting guidelines, data handling options, and migrating customer, vendors and partners.
- **SuiteApps Resources:** Provide resources and tools to potentially enhance NetSuite capabilities by using SuiteApps or bundles.

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.