

# Prepare for the Oracle NetSuite Administrator Exam

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## About the Oracle NetSuite Administrator Exam

The Oracle NetSuite Administrator certification is designed for individuals with 1-2 years' experience configuring and managing a complex NetSuite account. This certification supports candidates who want to become proficient in fully managing and supporting their organization's NetSuite solution.

This is the second exam required for the Oracle NetSuite Administrator certification, to be taken after the Oracle NetSuite SuiteFoundation exam has been passed.

Passing this Oracle NetSuite Administrator exam certifies that you have the knowledge and skills necessary to be an Oracle NetSuite Certified Administrator.

This certification validates the knowledge and skill to configure and maintain:

- Reports, Searches and dashboards
- Customizations of records, fields, and forms
- Support workflows, release updates, and integrations
- User roles, user access, and data security

## Recommended Skill Level

The candidate has ideally 1-2 years of experience configuring and managing a robust NetSuite implementation or account. The candidate can perform the day-to-day tasks of managing the application to meet the company's needs. Their role is to support users and they understand the standard business processes, standard accounting practices, advanced features, options, and capabilities of the product.

## Recommended Training

NetSuite provides a variety of resources including eLearning courses, detailed articles and guides, and community knowledge bases that are designed to enhance your NetSuite skills and knowledge.

### MyLearn

Use MyLearn as your primary resource to prepare for the exam. Search for the **Certification Preparation – Administrator** learning path to find a complete list of required courses.

MyLearn courses include video demonstrations that show you how to perform administrator tasks in NetSuite. Some courses also provide downloadable Quick Reference Guides. In some courses, you can request a Lab to apply your knowledge in a NetSuite test environment.

### NetSuite Help Center

The NetSuite Help Center contains detailed articles, guides, and how-to's that cover NetSuite functionality.

Consult the Help Center for more information on the exam topics.

## SuiteAnswers

SuiteAnswers is a community-driven knowledge base with official NetSuite responses and FAQs on a variety of related topics.

Go to SuiteAnswers to explore the exam topics.

To access SuiteAnswers, log in to your NetSuite account, click **Help**, and select **SuiteAnswers** from the center or Additional Resources menu.

## Topics Covered by the Exam

Exam topics indicate the key areas covered in the exam, helping you study specific NetSuite skills and knowledge you need to pass the exam:

<b>SuiteAnalytics</b>	Identify the options in defining advanced saved searches to obtain the described results.
	Recognize which record to use as the basis of a search to yield a desired result.
	Compare the methods of sharing search results vs. reports for a given use case.
	Determine the best method to monitor saved search usage and access.
	Identify the advantages of various methods of publishing or updating dashboards.
	Compare dashboard elements to address user requirements.
<b>SuiteBuilder</b>	Recognize use-cases driving form selection.
	Compare the considerations when setting field options at the field vs. at the form level.
	Identify implications of various methods of restricting users to a particular custom form.
	Identify considerations and impact of creating online forms.
	Identify functionality of custom form layout and printing functionality.
	Compare differences between field display types and uses cases where appropriate.
	Match custom field settings for displaying, calculating, or manipulating data from other fields or records to use cases.
	Compare differences between setting "Record is Parent" vs. publishing a sublist search.
	Identify when to use a custom record over a custom list.
	Given a use case, select appropriate attributes when defining a custom record type.

<b>SuiteCloud Platform</b>	Order the steps in creating a SuiteFlow from a given scenario.
	Identify scenarios where SuiteFlow can be used to solve a user requirement.
	Identify a method for determining all the automations running for a given record.
	Order the steps in creating or finding and installing or uninstalling a SuiteBundle.
	Compare differences between Managed vs. non-managed bundles and identify steps in updating already installed bundles.
	Compare uses of SuiteTalk/SOAP Web Services, SuiteScript, ODBC/SuiteAnalytics Connect and CSV Import to manage data in NetSuite.
<b>Setup and Administration</b>	Recognize recommended NetSuite practices for creating and assigning custom roles and use of Global Permissions and Core Administrator Permission.
	Identify how subsidiary access is defined on custom roles and impact of subsidiary on entity records.
	Recognize best practices around the use of the Administrator Role.
	Identify how role options affect the records, searches, and forms to which a user will have access.
	Identify considerations of assignment of limited access or custom role to Vendor, Partner, Customer, or Employee.
	Recognize the capabilities of the Multi-language feature.
	Recognize NetSuite recommended practices around managing NetSuite environments (Sandbox, Production, Release Preview).
	Determine the proper use of advanced options in CSV Import and SuiteCloud Plus.
	Analyze an error in the CSV Import process to determine the appropriate resolution.
<b>Data Security</b>	Identify methods for controlling access to File Cabinet.
	Identify available security controls for user login, including Two-Factor Authentication and Single Sign-On.
	Identify setup for Two-Factor Authentication and Single Sign-On.
	Recognize permissions with high levels of data access.
	Identify the strategies to manage data security risks when an employee leaves.
	Identify impact of changing field values on reporting.
<b>Working with NetSuite</b>	Identify how to view or change system alert email notifications.
	Recognize recommended steps in the New Release Test Plan.
	Given a scenario, determine what information is needed to troubleshoot a problem.
	Identify how to determine how many licenses are provisioned and number of licenses being used.

	Identify steps and benefits of accessing the NetSuite Support Center Role.
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## Study Suggestions

### SuiteAnalytics

#### Identify the options in defining advanced saved searches to obtain the described results.

**How to Study:** Master these concepts: Summary types, formulas, functions, expression builder (), minimum, maximum, grouping, averages, apply to. Search Formula Examples and Tips

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

**How to Study:** Study how NetSuite standard record types are joined to each other. Search Formula Examples and Tips; Standard Search Filters

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

**How to Study:** Know how to compare these functions for sharing data, as related to Saved Searches vs. Custom Reports: Messaging, Alerts, Scheduling, Emails. Know the difference between sending out a single record, vs. summary of records. How is timing affected for these features? Is there a way to send them out to a pre-defined group of people? What if the recipient list varies depending on the results, Defining Recipients for Saved Search Email; Sending Summarized vs. Single-Record Results

#### Determine the best method to monitor saved search usage and access.

**How to Study:** Become familiar with how to give access to users to Saved Searches and how to monitor who executes/edits/deletes Saved Searches; Defining Audiences for Saved Searches, Audit Trail for Saved Searches, Reports and Schedules

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

**How to Study:** Compare advantages and disadvantages of using standard roles with Publish Dashboard permission, vs. creating custom roles only for publishing dashboards, vs. using the Global Permissions feature. Review these Publishing a Dashboard; Applying Changes to Published Dashboards

#### Compare dashboard elements to address user requirements.

**How to Study:** Compare these dashboard elements to each other: Key Performance Indicator, Reminder, KPI Scorecard, Snapshot, KPI Meter. Know steps required to set up each of these, and the source data (does it require a saved search, or a custom report?).

### SuiteBuilder

#### Recognize use-cases driving form selection

**How to Study:** Know how these features work: Store Form with Record, Linked Transaction forms. Know which record types these options are available with. Creating Custom Entry and Transaction Forms; Linking Transaction Forms

#### Compare the considerations when setting field options at the field vs. at the form level.

**How to Study:** Know custom field types. Know recommended practices for making fields mandatory, or setting default values, at the field level vs. at the form level. Custom Check Box field default to be checked on Custom Form

### Identify implications of various methods of restricting users to a particular custom form.

**How to Study:** Know the difference between marking a Form "Preferred" vs. "Restricted" vs. clearing the "Enabled" column. Understand implication of hiding the custom form field. Recognize where a custom form can be marked Preferred. Setting Default Forms for Roles; Defining Preferred Forms

### Identify considerations and impact of creating online forms.

**How to Study:** Identify steps to create and publish online forms, identify use cases where an online form may be used. Know how data is submitted using these online forms, and the mandatory fields for creating each. Know the 3 record types that have online form capability. Enable Online Forms; Creating Online Custom Record Forms

### Identify functionality of custom form layout and printing functionality.

**How to Study:** Know how to add a Custom Element to a custom form, and how it is used. Know how PDF vs. HTML layout versions of printed forms differ, and when they are used. Know where the default settings are for the user. Defining Custom Elements; Transaction Form HTML Layouts; Transaction Form PDF Layouts

### Compare differences between field display types and uses cases where appropriate.

**How to Study:** Know these custom field options and compare them to each other: Hidden, disabled, normal, inline text. Know the difference between 1) setting field width to 0 vs. 2) hide field label; Setting Display Options for Custom Fields

### Match custom field settings for displaying, calculating, or manipulating data from other fields or records to use cases.

**How to Study:** Know how to use these custom field features: Filtered lists based on criteria, Dependent Dropdowns; Source data from one record to another, Formula fields. Create Controlling and Dependent Dropdown Fields or Nested List; Setting Filtering Criteria; Setting Sourcing Criteria; Creating Formula Fields

### Compare differences between setting "Record is Parent" vs. publishing a Sublists search.

**How to Study:** Memorize the differences in functionality between these 2 methods of creating sublists: 1) Publish Search, or 2) Record is Parent. Which one allows creation of new records from the sublist view? Which allows Customize View option? Custom Child Record Sublists; Creating Saved Searches for Custom Sublists

### Identify when to use a custom record over a custom list.

**How to Study:** Consider how these use cases may drive a Custom List vs. Custom Record design decision: dependent dropdowns, reporting requirements, need for an online form, one to many data relationships. : Creating Online Custom Record Forms

### Given a use case, select appropriate attributes when defining a custom record type.

**How to Study:** Identify the UI behavior and user access as defined by the settings in the header of the Custom Record. Creating Custom Record Types

## SuiteCloud Platform

### Order the steps in creating a SuiteFlow from a given scenario.

**How to Study:** Study the various elements created as part of a workflow, and which order they are created in. Creating Your First Workflow

**Courses Addressing This Topic:** SuiteCloud: Exploring the NetSuite Platform

**Identify scenarios where SuiteFlow can be used to solve a user requirement.**

**How to Study:** Understand how SuiteFlow Actions and Conditions are defined, and how they work together. Workflow Actions

**Identify a method for determining all the automations running for a given record.**

**How to Study:** How would an administrator identify whether a SuiteFlow or a SuiteScript is running on a record type? Where can an Administrator check on which scripts have been installed and are running in an account, as opposed to test mode? Using the Scripted Records Page; Script Deployment

**Order the steps in creating or finding and installing or uninstalling a SuiteBundle.**

**How to Study:** How to install a SuiteApp/Bundle, searching for bundles in the repository, creating and installing a bundle, uninstalling a bundle. NOT ON TEST: configuration bundle. Keywords bolded above. SuiteBundler Overview (and related topics)

**Compare differences between Managed vs. non-managed bundles and identify steps in updating already installed bundles.**

**How to Study:** SuiteBundler Overview (and related topics); Understanding Managed Bundles

**Compare uses of SuiteTalk SOAP Web Services, SuiteScript, ODBC/SuiteAnalytics Connect and CSV Import to manage data in NetSuite.**

**How to Study:** Contrast these features in their uses, and limitations for managing data. You will be given business use cases and will select which feature can be used to meet the requirement. Data import, data update, single sign-on, data validation, business process automation, triggers.

## Setup and Administration

**Recognize recommended NetSuite practices for creating and assigning custom roles and use of Global Permissions and Core Administrator Permission.**

**How to Study:** Know how custom roles are based upon Centers. Know why it is always recommended to create custom roles, rather than just assign the standard role. Managing NetSuite Roles; Understanding NetSuite Permissions, Using the Global Permissions feature; Core Administration Permissions

**Identify how subsidiary access is defined on custom roles and impact of subsidiary on entity records.**

**How to Study:** Permissions and Restrictions; Associating Subsidiaries with Entities; Creating Intercompany Customers and Vendors; Controlling Employee Access to Subsidiaries

**Recognize best practices around the use of the Administrator Role.**

**How to Study:** It is recommended that you have two Administrators, but they do not use the Administrator role for their everyday access.

**Identify how role options affect the records, searches, and forms to which a user will have access.**

**How to Study:** Review Forms and Searches tabs in Custom role screen. Permissions and Restrictions

**Identify considerations of assignment of limited access or custom role to Vendor, Partner, Customer, or Employee.**

**How to Study:** Assigning the Advanced Partner Center Role; Assigning Roles to Vendors; Giving Customers Access; Employee Center Role, The Partner Center Role

**Recognize the capabilities of the Multi-language feature.**

**How to Study:** Multi-Language Names and Descriptions; Choosing a Language for Your NetSuite User Interface; Setting Up Multiple Languages

**Recognize NetSuite recommended practices around managing NetSuite environments (Sandbox, Production, Release Preview).**

**How to Study:** Sandbox refresh, Release Preview.

**Determine the proper use of advanced options in CSV Import and SuiteCloud Plus.**

**How to Study:** Topics include: Advanced Options in CSV tool: multi-threading, CSV mapping options: default values, internal|external|name ID options. Best practices around system notes in CSV import. Where else are there CSV import options, besides the main CSV import tool? Who has access to checkbox to run scripts against the import? Guidelines for using CSV import tool for data imports

**Analyze an error in the CSV Import process to determine the appropriate resolution.**

**How to Study:** Common errors: required field is null, read-only field, invalid reference (spelled item name wrong, e.g.)

## Data Security

**Identify methods for controlling access to File Cabinet.**

**How to Study:** Know these methods of working with the NetSuite File Cabinet: File Cabinet, Group access, available without login, publish the URL internal vs. external. Working with the File Cabinet

**Identify available security controls for user login, including Two-Factor Authentication and Single Sign-On.**

User login security: password reset, User security question, weak/strong password, forced changes, authentication options, minimum password length, etc. Password security.

**Identify setup for Two-Factor Authentication and Single Sign-On.**

**How to Study:** Two-Factor Authentication (2FA), Managing Two-Factor Authentication, Authentication Overview

**Recognize permissions with high levels of data access.**

**How to Study:** Permissions

**Identify the strategies to manage data security risks when an employee leaves.**

**How to Study:** Terminating an Employee; Using the Login Audit Trail

**Identify impact of changing field values on reporting.**

**How to Study:** Impact of changing fields such as, Accounts on the Item record after the Items have been sold; changing the manager on employee record does not change historic manager on time entries; managers for sales reps--how does this impact on sales reports?

**Working with NetSuite**

**Identify how to view or change system alert email notifications.**

**How to Study:** Using System Alerts; Setting Email Preferences; Configuring Administrative Notifications

**Recognize recommended steps in the New Release Test Plan.**

**How to Study:** Overview of Release Preview; Accessing Your Release Preview Environment; Preparing for Testing; Recommended Test Plan; More New Release Resources; Functionality Available for Testing; How to Report Release Preview Issue; Understanding NetSuite Environments

**Given a scenario, determine what information is needed to troubleshoot a problem.**

**How to Study:** Troubleshooting Performance Issues; Admin Notifications and status. NetSuite.com; Create a portlet that will show status. NetSuite.com; Increasing Speed and Performance in NetSuite; Improving Client Performance; Optimizing Custom Form Performance

**Identify how to determine how many licenses are provisioned and number of licenses being used.**

**How to Study:** Checking the User License Count; Full Access User and Employee Center Licenses Usage Count; Roles That Do Not Use Up Full User License

**Identify steps and benefits of accessing the NetSuite Support Center Role.**

**How to Study:** The NetSuite Account Center; Accessing the NetSuite Account Center