NetSuite Analytics Warehouse

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Table of Contents

NetSuite Analytics Warehouse Overview

Watch the following help video for information about NetSuite Analytics Warehouse:

NetSuite Analytics Warehouse Overview

With NetSuite Analytics Warehouse, you can broaden the analyses of your NetSuite data beyond what is currently available in SuiteAnalytics Workbook. The Analytics Warehouse enables businesses to analyze historical data from multiple sources and determine how to improve their business. When enabled, you can begin transferring your data to the Analytics Warehouse. You can then blend your NetSuite data with data from other sources, and analyze it with a wide set of visualizations.

Enabling NetSuite Analytics Warehouse

Before you begin transferring your data to the Analytics Warehouse, you must first enable the feature.

To enable NetSuite Analytics Warehouse in your account:

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. Click the **Analytics** subtab.
3. Check the **NetSuite Analytics Warehouse** box.

Your Analytics Warehouse account begins configuration. This process may take some time. When the configuration is complete, you must set up your Analytics Warehouse account by:

- Adding Users to NetSuite Analytics Warehouse
- Setting Up the Data Transfer

Data Warehouse Integrator Role

When you enable the Analytics Warehouse feature in your account, you are automatically assigned the Data Warehouse Integrator role. You can also assign the Data Warehouse Integrator role to any users.

When you assign the Data Warehouse Integrator role to a user, their name appears in the User Account for Data Transfer Credentials dropdown list on the NetSuite Analytics Warehouse Configuration page.

The Data Warehouse Integrator role has view access to all standard and custom production data. The Data Warehouse Integrator role is for machine to machine integration meaning that you cannot sign in using this role.

> **Note:** The Data Warehouse Integrator role does not count against the Full Licensed Users count.

To assign the Data Warehouse Integrator Role to users

1. Log in to NetSuite with an administrator role.
2. Go to Lists > Employees > Employees.
3. Click **Edit** next to the name of the employee you want to assign the Data Warehouse Integrator role to.
4. Click the **Access** subtab.
5. On the Roles subtab, select the Data Warehouse Integrator role from the list.
6. Click **Add**.
7. Click **Save**.

For more information, see the help topic Assigning Roles to an Employee.

Supported Functional Areas

Data from your NetSuite account is grouped into functional areas in the Analytics Warehouse. To include a functional area in your data transfer to the Analytics Warehouse, see Setting Up the Data Transfer.

To learn about the record types and fields available in the NetSuite2.com data source, see the help topic Record Types and Fields.

The following functional areas are currently supported in NetSuite Analytics Warehouse:

- Bank
- Employee Expenses
- Financials
- Inventory
- Inventory Snapshot
- Manufacturing
- Payroll
- Purchases and Payables
- Sales

Subject Areas

The table below shows the link between the functional areas and the subject areas:

Functional Area	Subject Area
Bank	Check Credit Card Charge Credit Card Refund Deposit Sales Tax Payment Tax Liability Cheque
Employees	Commissions Snapshot Expense Report Expense Report Snapshot
Financials	Currency Revaluation GL Impact Adjustment Journal Revenue Arrangement Revenue Arrangement Snapshot Revenue Commitment Revenue Commitment Reversal
Inventory	Bin Putaway worksheet Bin Transfer Inventory Adjustment

Functional Area	Subject Area
	Inventory Cost Revaluation Inventory Count Inventory Item Location Quantity Inventory Snapshot Inventory Transfer Inventory Worksheet Ownership transfer Transfer Transfer Order
Manufacturing	Assembly Build Assembly Unbuild Work Order Work Order Close Work Order Completion Work Order Issue Work Order Snapshot
Payroll	Paycheck Paycheck Journal
Purchasing	Inbound Shipment Item Receipt Purchase Contract Purchase Order Purchase Order Snapshot Purchase Requisition Vendor Bill Vendor Bill Credit Vendor Bill Payment Vendor Bill Snapshot Vendor Return Authorization Vendor Return Authorization Snapshot
Sales	Cash Refund Cash Sales Charge Commissions Credit Memo Customer Deposit Customer Invoice

Functional Area	Subject Area
	Customer Invoce Snapshot Customer Payment Customer Payment Authorization Customer Refund Deposit Application Estimate Fulfillment Request Item Fulfillment Opportunity Opportunity Snapshot Return Authorization Return Authorization Snapshot Sales Order Sales Order Snapshot
Projects and Support Management	—

Prebuilt Content

The table below shows all the prebuilt KPI's, decks, cards, and analyses that are shipped as the standard offering along with the product. For more information, see Reference for Oracle NetSuite Analytics Warehouse.

Functional Area	Pre-Built Content
Financials	Spend Financials Gross Margin DSO/DPO Analysis Receivable Detailed Analysis Payable Detailed Analysis COGS Detailed Analysis Cash Forecast Detailed Analysis
Inventory	Inventory Analysis Inventory Detailed Analysis Inventory Turnover Detailed Analysis Back Order Detailed Analysis Inventory Count Detailed Analysis Inventory Transfer Detailed Analysis Item Cost Detailed Analysis

Functional Area	Pre-Built Content
Purchasing	Purchasing Analysis Purchase Order Detailed Analysis Procurement Detailed Analysis Requisition Detailed Analysis Vendor Delivery Detailed Analysis Vendor Payment Detail Vendor Payment Detailed Analysis Vendor Return Detailed Analysis Vendor Spend Detailed Analysis
Sales	Payment Detailed Analysis Invoice Detailed Analysis Customer Sales Detailed Analysis Item Sales Detailed Analysis Net Sales Order Detailed Analysis Overdue Invoiced Detailed Analysis Sales Order Detailed Analysis Shipment Detailed Analysis Forecast Accuracy Detailed Analysis Item Fulfillment Detailed Analysis Opportunity Win/Loss Detailed Analysis Pipeline Detailed Analysis Payment Details Sales Order Details Overdue Invoice Details Invoice Details Gross Margin Sales Order Analysis Return Details Order Management Fulfillment Details Customer Return Detailed Analysis Customer Payment Analysis Customer Invoice Analysis Customer Growth
Industry Metrics	Services

Setting Up NetSuite Analytics Warehouse

Watch the following help video for information about how to set up NetSuite Analytics Warehouse:

Setting Up NetSuite Analytics Warehouse

After the Analytics Warehouse feature is enabled in your account, you must complete the setup by Adding Users to NetSuite Analytics Warehouse and Setting Up the Data Transfer.

Adding Users to NetSuite Analytics Warehouse

Adding users to your Analytics Warehouse account enables them to work with data transferred to the Analytics Warehouse. You can add NetSuite users and non-NetSuite users.

To add NetSuite users to your NetSuite Analytics Warehouse account:

1. Go to Setup > Integration > NetSuite Analytics Warehouse > Configuration.

   Note: The configuration page might take some time to load.

2. Click **NSAW User Management**.
3. Click **Add NetSuite Users**.
4. Select the users you want to add and click **Apply**.

To add an external user to your NetSuite Analytics Warehouse account:

1. Go to Setup > Integration > NetSuite Analytics Warehouse > Configuration.

   Note: The configuration page might take some time to load.

2. Click **NSAW User Management**.
3. Click **Add External User**.
4. Enter the first name, last name, and email address of the user and click **OK**.

All new users receive an email notification from the Analytics Warehouse asking them to complete their account activation.

Setting Up the Data Transfer

To begin transferring data to the Analytics Warehouse, you need to select which functional areas to include. Data from your NetSuite account is grouped into predefined functional areas. To learn about the record types and fields available in the NetSuite2.com data source, see the help topic Record Types and Fields.

The following functional areas are currently supported in the Analytics Warehouse:

- Bank
- Employee Expenses

- Financials
- Inventory
- Inventory Snapshot
- Manufacturing
- Payroll
- Purchases and Payables
- Sales

For more information, see Supported Functional Areas.

To set up the data transfer:

1. Go to Setup > Integration > NetSuite Analytics Warehouse > Configuration.
2. Click **NSAW Data Transfer Setup**.
3. Select the date from when you want your data transferred.
4. Select the subsidiary.
5. Select the functional areas to include in the transfer.

Data from the selected functional areas is refreshed automatically every 24 hours. The **Last Transfer** column displays the date and time of the first automatic data transfer, or the last manual data transfer. You can find the time remaining before the next automatic data transfer above the functional area list. You can select the interval and specify the time, day, and month of your incremental data load in the Oracle NetSuite Analytics Warehouse.

The first data transfer may take some time. The subsequent data transfers happen incrementally every day and take three to four hours.

You don't have to wait until the scheduled data transfer. To work with the most recent data, click **Transfer Data** in the **Transfer Data** column to manually start a data transfer. The status of the data transfer is shown in the **Last Transfer** column.

> **Note:** If your automatic data transfer is scheduled in the next hour, the manual data transfer will not start and you will have to wait for the scheduled time.

Resetting NetSuite Analytics Warehouse Transfer Credentials

As a safety measure for your data, you can reset your Analytics Warehouse transfer credentials at any time. When you reset your Analytics Warehouse transfer credentials, new tokens are created and are automatically sent to the Analytics Warehouse. Allow a few minutes for your Analytics Warehouse transfer settings to be configured. While your new transfer credentials are being configured, you cannot access the Analytics Warehouse configuration.

To reset your Analytics Warehouse transfer credentials on the configuration page, click **Reset Transfer Credentials**. By default, transfer credentials are assigned to the user that enabled the Analytics Warehouse. If you want to assign the Analytics Warehouse transfer credentials to a different user, choose the user from the dropdown list and click **Reset**.

Note: Your NetSuite Analytics Warehouse transfer credentials can only be assigned to a user who is assigned the Data Warehouse Integrator role.

Invalid Credentials Error

You must always have a user with the valid Data Warehouse Integrator role and transfer credentials. If you receive an invalid credentials error email, check the **User Account for Data Transfer Credentials** list, and ensure the list is not empty. The data transfer to the NetSuite Analytics Warehouse will hold until a valid user is added.

To resolve the error, select the user from the list and click **Reset Transfer Credentials**.

Updating Analytics Administrator Email

The Analytics Administrator receives any notifications related to your NetSuite Analytics Warehouse account, such as service availability. To change the Analytics Administrator email address, choose the user from the dropdown list and click **Update NSAW Admin Email**.

NetSuite Analytics Warehouse Basics

For more detailed information about working with data in the NetSuite Analytics Warehouse, see Get Started with Oracle NetSuite Analytics Warehouse.

Managing Data in NetSuite Analytics Warehouse

To work with data transferred to the Analytics Warehouse, on the NetSuite Analytics Warehouse configuration page, click **Log in to NetSuite Analytics Warehouse** in the system configuration information. The NetSuite Analytics Warehouse Home appears.

To manage the Analytics Warehouse, the following are available in the menu:

Page Name	Description
Projects	The Catalog page appears which displays projects and other objects. For more information, see Work with Projects.
Data	The Data Page lists all data sets. For more information, see Work with Data.
Console	The Console Page is where you manage advanced settings for the Analytics Warehouse. For more information, see Configure Oracle NetSuite Analytics Warehouse Data.