



keyteachTM

NETSUITE

PLANNING & BUDGETING: ADMINISTRATOR

Gain a comprehensive understanding of NetSuite Planning and Budgeting (PBCS) to enable the design and creation of more effective, optimised and better performing applications in this in-depth three day training course, that provides all the tools necessary to be an effective system administrator.

Learning Objectives:

Learn how to design and build NetSuite Planning and Budgeting (PBCS) applications. Create planning models that are integrated with NetSuite and gain an in-depth understanding of how to make efficient use of the capabilities and extensibility of PBCS for NetSuite. Learn how to leverage the potential of this powerful solution in order to build more effective applications and workflows.

Course Description:

This course focuses on the options, functionality and design considerations that impact the performance of NetSuite PBCS applications. You'll learn how to apply best practice techniques during the development process. You'll learn about the multi-dimensional hierarchies supported by PBCS and gain an appreciation of the complexities and possibilities of the solution.

Learn how NetSuite PBCS facilitates both company-wide and departmental financial planning with extensive modeling capabilities, approval workflows and reporting within a single, collaborative, scalable solution.

Explore the powerful calculation engine accommodating a wide range of business logic with fast in-memory aggregation and instant financial planning analysis and reporting and extensive integration with Excel Word and PowerPoint.

This course will equip attendees with the necessary tools and knowledge to design and build effective, responsive and highly optimised applications.

This course is available as an instructor-led course as well as self-paced 'On Demand' learning, providing training in your own time at your own convenience.

ORACLE[®] PARTNER



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Course Information:

Audience:	Implementation consultants, developers, system administrators
Pre-requisites:	None
Duration:	3 days
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	21 Credits - Computer Software and Applications
Programme Level:	Intermediate

Summary by Day:

Day 1: Navigation, functionality overview, terms and concepts, managing applications, loading metadata, using forms and task lists, custom menus, smart lists, overview of Data Management (FDMEE), budget versions, rolling forecasts and an overview of the approvals process.

Day 2: Application migration and backups, basic calculation and member formulas, Security, overview of Financial Reporting, Smart View, plan types, loading metadata, building forms and task lists, smart lists,

Day 3: Detailed calculations, substitution variables, top-down allocations, setup of approvals process, translation and aggregation, driver-based planning, grid diagnostics.

Detailed Agenda

- Solution overview
- Overview of PBCS functionality
- Navigation of the interfaces
- Review key terms and concepts
Review the key NetSuite PBCS terms relating to dimensions, members and the wider application. Explore the concepts that are key to the planning process in PBCS to gain a "big picture" understanding.
- Loading metadata
- Data entry methods
- Adjusting forecasts
A variety of adjustment techniques are available when working with PBCS, allowing you to amend individual values or adjust whole data ranges as required.
- Comparing budget versions
PBCS allows for multiple versions of your budgets and forecasts to be prepared. Discuss how this functionality can be leveraged to provide an iterative planning process.
- Rolling forecasts
- The approvals process
- Application Migration
Discover how to move artefacts between development and production applications. Find out how to back up an application.
- Basic calculation and member formulas
- Managing exchange rates
- Understanding security
Control access to an application and its components
- Overview of Financial Reporting Studio
Understand more about running Financial Reports and get an overview of Financial Reporting Studio.
- Smart View
 - Ad Hoc Analysis
Discover the benefits of using Ad Hoc Analysis functionality to create queries and analyse data from PBCS.
 - Smart View across Microsoft Office
Understand how Smart View can be used across the suite of Microsoft Office products such as Word, PowerPoint and Outlook.
- Review of architecture
- My Services
- Application and plan types
- PBCS dimensionality
- Creating applications
Explore the variety of options and design decisions available when creating new PBCS applications.
- Designing Data forms & task lists
Task lists guide users through the planning process and data forms provide a window to the database for the review and manipulation of data.
- Building Custom menus
Learn how to enhance navigation within PBCS through the development of custom menus that enable users to more easily access custom content.
- Grid diagnostics
- Data Auditing
- Setup of source data integration and Data Management (FDMEE)
- Designing an Approvals Process
Undertake a simple approvals process in order to review the various available options for the promotion, delegation and sign off of planning data. You'll discover how to set up a Planning Unit hierarchy and perform the required Scenario and Version assignment.
- Advanced calculation
Understand how to work with Calculation Manager to design, maintain and deploy more advanced business rules for a PBCS application.
- Substitution variables
Add flexibility through the use of dynamic substitution variables for use in data forms and business rules.
- Top-down allocations and bottom-up strategies
- Translation and aggregation
When working with multi-currency applications, you can automate the translation of data to the available reporting currencies.
- Driver-based planning
Customisable calculations allow you to embed a driver-based approach in your planning process.
- Understanding EPM Automate
Discover how the EPM Automate utility can help to streamline and automate common tasks such as loading data and managing the Cloud environment.

Also available
as a self-paced
"On Demand" course



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