



keyteach™

NETSUITE

PLANNING &
BUDGETING:
ADMINISTRATOR



Gain a comprehensive understanding of NetSuite Planning and Budgeting (NSPB) 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 (NSPB) 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 NSPB 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 NSPB applications. You'll learn how to apply best practice techniques during the development process. You'll learn about the multi-dimensional hierarchies supported by NSPB and gain an appreciation of the complexities and possibilities of the solution.

Learn how NetSuite NSPB 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.

Planning and Budgeting (NSPB)

Course Information:

Audience:	Implementation consultants, developers, system administrators
Pre-requisites:	None
Duration:	Hybrid: 2 days Self-Paced E-Learning + 3 days Instructor-led Training (ILT)
Delivery Method:	Group-Live, Group Internet-Based, and QAS Self Study
Advanced Preparation:	None
Recommended CPE Credits:	21 Credits - Computer Software and Applications
Programme Level:	Intermediate

Detailed Agenda

- Solution overview
- Overview of NSPB functionality
- NSPB Sync and Data Integration from NetSuite
- Navigation of the interfaces
- Review key terms and concepts
 - Review the key NetSuite NSPB terms relating to dimensions, members and the wider application. Explore the concepts that are key to the planning process in NSPB to gain a "big picture" understanding.
- Loading metadata
- Data entry methods
- Adjusting forecasts
 - A variety of adjustment techniques are available when working with NSPB, allowing you to amend individual values or adjust whole data ranges as required.
- Comparing budget versions
 - NSPB 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 NSPB.
 - 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
- NSPB dimensionality
- Creating applications
 - Explore the variety of options and design decisions available when creating new NSPB applications.
- Designing Data forms and 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 NSPB 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 Integration
- 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 NSPB 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.



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