ORACLE NETSUITE PLANNING AND BUDGETING FOR ADMINISTRATORS

Course Description

Do you need to learn how to set up and configure Oracle NetSuite Planning and Budgeting and maintain the integration between NetSuite and Planning and Budgeting?

This one-day course includes video tutorials illustrating how to build and configure the system and how to enter data. You can select which tutorials to watch for just-in-time training or you can complete all the tutorials for a comprehensive training experience.

Expert instructors walk you through each process, and along the way, share recommended tips, best practices and key points.

Who Should Attend

This course will benefit Administrators and Controllers who are responsible for the setup, configuration and/or maintenance of Planning and Budgeting and its integration with NetSuite.

Prerequisites

Participants should be familiar with NetSuite navigation, configuration and Saved Searches prior to class.

Key Tasks
How do I:

- Access and navigate Planning and Budgeting?
- Create a new planning application?
- Build and configure dimensions and their elements?
- Build and configure user defined elements?
- Create forms?
- Manage business rules?
- Enter and submit data in forms?
- Filter, sort and spread data?
- Adjust data?
- Annotate and analyze data?
- Navigate planning tasks in Smart View?
- Analyze data with Smart View?
- Configure and use an approval process?
- Import and export metadata?
- Load calculating data?

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Agenda

Describing the Planning Application and Navigating the User Interface

Overview of Oracle NetSuite Planning and Budgeting: This lesson provides an overview of Planning and Budgeting. It describes what the service allows you to do, what the benefits are and how you can implement your applications.

Accessing and Navigating Planning and Budgeting: Learn how to access the planning application and navigating through the main console.

Planning Application Overview: Learn about the different types of applications that you can create and the different elements that go into an application.

Building and Configuring an Application

Creating a Planning Application: Learn how to create applications. Start off with creating a Lite application and then look at creating a Standard application.

Building and Configuring Dimensions and Their Elements

Aliases, Currencies, Years and Periods: Learn how to set up aliases and alternate names for members. Examine how to create alias tables and to set currency preferences.

Setting up Scenarios and Versions: Learn how to set up scenarios and versions and view some of the more important properties of the members of those dimensions.

Planning Dimensions: Look at all the dimensions that you require, and those that you don't, for a planning application.

Managing Dimensions: Learn how to manage dimensions in the application, how dimensions are organized and how to manage member hierarchies.

Learn how to organize the members to make the application run better.

Adding Entity and Account Dimensions: Take a closer look at entities and account dimensions, what they mean, and how to add and delete. Learn about the properties of members in these dimensions and how they aggregate.

Building and Configuring User-Defined Elements

Creating User-Defined Elements: Learn how to create user-defined elements in your planning application.

Setting up Exchange Rates: Learn how to set up exchange rates and how currency conversions work in planning.

Creating Task Lists: Learn how to build a task list, how to assign access to it and how to navigate it.

Entering and Calculating Data

Creating and Enhancing Forms: Learn how to build simple and composite forms and how to enhance them.

Managing Business Rules: Learn how to manage business rules.

Entering Data in Planning: Describe the data entry process and learn how to access your data entry forms.

Submitting Data in Forms: Learn how to submit data in web forms.

Filtering, Sorting, Spreading and Adjusting Data: Learn how to filter, sort, spread and adjust data, and explore more advanced topics for data entry.

Annotating and Analyzing Data: Learn how to annotate and analyze data.

Introducing Smart View for Office: Describe Smart View, manage your Smart View connections and access the Smart View options.

Navigating Planning Tasks in Smart View: Learn how to navigate planning tasks in Smart View.

Analyzing Data with Smart View: Learn how to analyze data with Smart View, perform ad hoc analysis, create Smart Forms and present data in both Word and PowerPoint.

Administering Planning with Smart View: Learn how to administer planning with Smart View. Manage dimensions, refresh the Essbase databases and manage the approval process. Learn how to explore reports in Smart View.

Configuring and Using the Approval Process
Setting Up the Approval Process: Learn how the approval process works and how to manage it.

Oracle Help Center
Get answers to your Oracle Planning and Budgeting questions:

- Watch videos

- Download the User Guides

SuiteAnswers
Get answers to your support and training related questions:

- Go to Training Videos to find Getting Started tutorials.

- Take New Feature Training to learn about the latest NetSuite release.

Importing and Exporting Metadata
Integrating Planning and Budgeting with Other Oracle Applications: Learn how planning can integrate with other Oracle applications.

Loading Metadata: Learn how to load metadata, investigate the import options, and do an import and export of metadata.

Migrating Data from On-Premise Applications: Learn how to migrate from on-premise applications and the steps to migrate to Planning and Budgeting.

Loading and Calculating Data
Loading and Calculating Data: Learn how to load and calculate data.