



CARAVEL

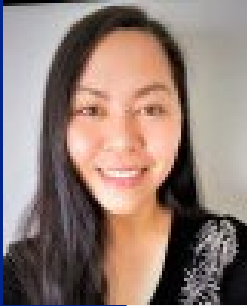
BPM Technology Solutions

NetSuite Planning & Budgeting Tips & Tricks

Customer Success Webinar Series



Caravel Team Introductions



Arbi Villena | Director EPM & BI

- 17+ YEARS: General Accounting, Budgeting & Financial Planning, Business Process Improvement, Statutory & Management Reporting, Dashboards & Data Visualization
- 11+ YEARS: Enterprise Performance Management (EPM) Software Implementation and Project Management

- 15,000+ HOURS: Software Implementation and Managed Services
- 250+ PROJECTS: Implemented; ~75% Full Cycle Implementations; ~50% as Lead / Solutions Architect
- SYSTEMS IMPLEMENTED: Oracle-NetSuite ERP, Oracle Cloud EPM (PBCS, NSPB, Smart View), Oracle-NetSuite Analytics Warehouse, Financial Data Management Enterprise Edition (FDMEE), Workday Adaptive Planning



Tai Valenzuela | Director, Advisory

Over the last 20 years, I have established and optimized brand strategies, harnessed the power of digital platforms, and led cross-functional teams towards generating substantial revenue growth.



Meagan Hove | Director, Client Engagement

As Caravel's dedicated client engagement lead, Meagan has spent the last 10 years working on strengthening relationships between companies and their clients.





AGENDA

1 About Caravel

2 NSPB Overview

3 Infolets

4 Dashboards

5 Cell Level Security

6 Clone Migration

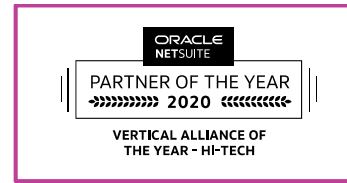
7 Navigation Flow

8 Action Menu

About **Caravel**



About Caravel



750+

**NETSUITE
IMPLEMENTATIONS**

9+

**VERTICAL
SPECIALTIES**

50+

**IP SOLUTION
BUNDLES**

1200+

**GLOBAL
EMPLOYEES**

1500+

**CONSULTING
PROJECTS**

150+

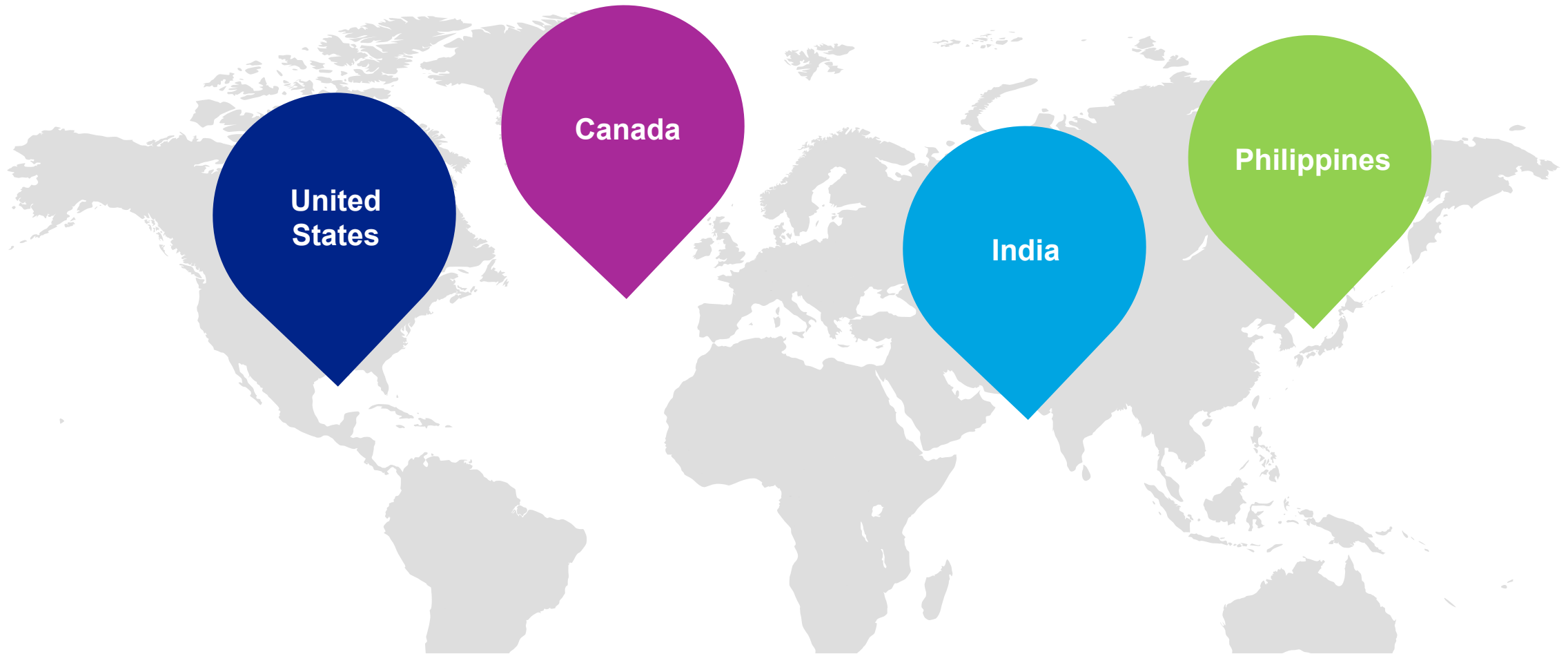
**MANAGED
SERVICES CLIENTS**

4

**GLOBAL
DEPLOYMENT
CENTERS**



FOUR Global Delivery Centers



Services

ADVISE



DEPLOY



SUPPORT



EXTEND



Tips & Tricks





Promote essential,
easily consumable
information

Group key
information by user
role

Progressively display
essential details and
actions

Provide a visually
rich means of
displaying essential
information

NSPB | Overview



Excel integration (SmartView) allows for complex reports to be created in seconds rather than hours or days



Multi-dimensional design allows for consolidated as well as detailed views of inputs



Prebuilt foundational models are designed to deploy rapidly then grow with evolving business needs for continually improved ROI



Highly customizable “pixel perfect” reporting that can be automatically distributed in PDF, HTML or Excel formats



NSPB | NetSuite Planning & Budgeting

Hyperion Solutions
Corporation Silicon Valley

February 2014 First
Cloud Product Launch (9
Releases +)



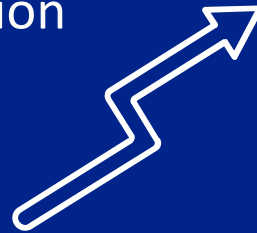
5,900+ Customers



Essbase Databases are
often called "Cubes"

*"One of the 10 most influential
technology innovations"*
- Information Age

15 Years of Product
Innovation



Deployments Across Industries

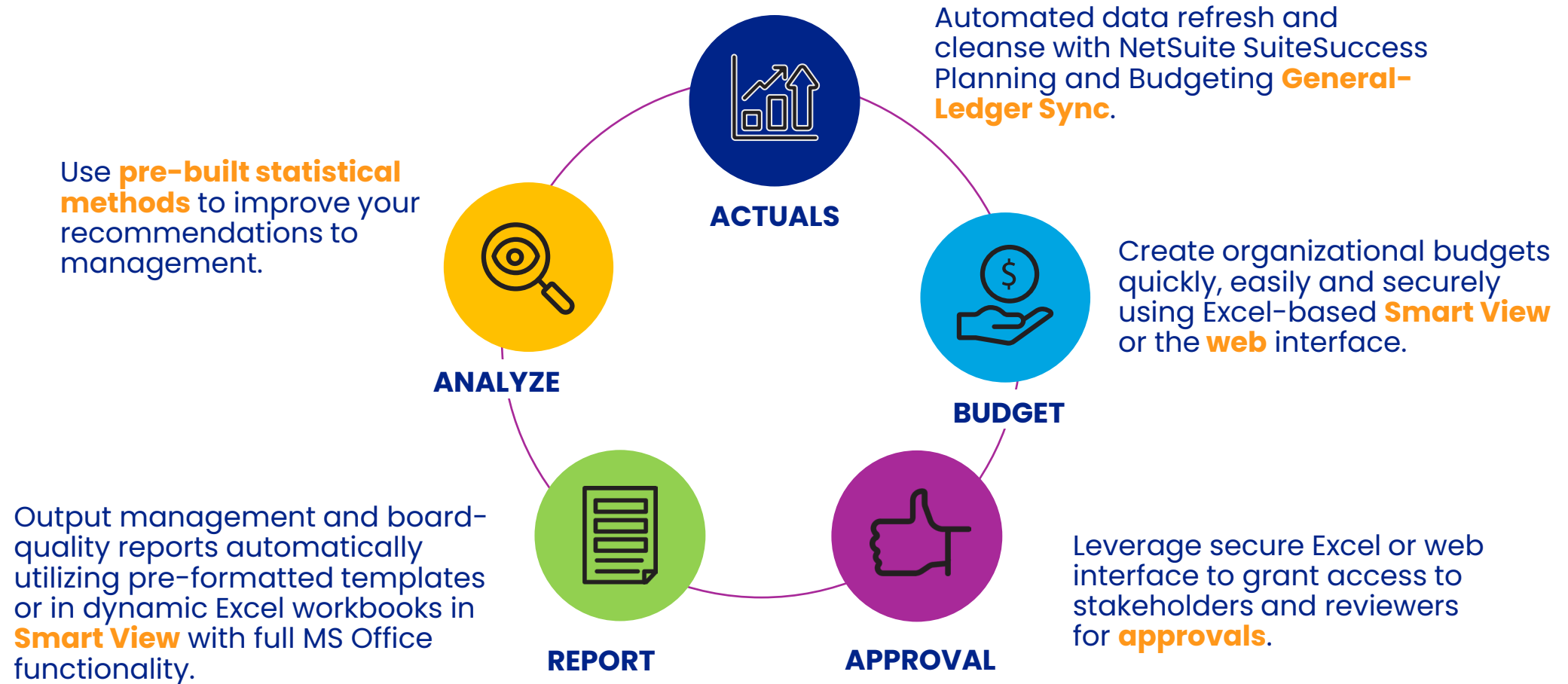
Medical Field, Financial Services, Higher Ed,
Consumer Goods, Retail, Not for Profit,
Services, High Tech, Public Sector

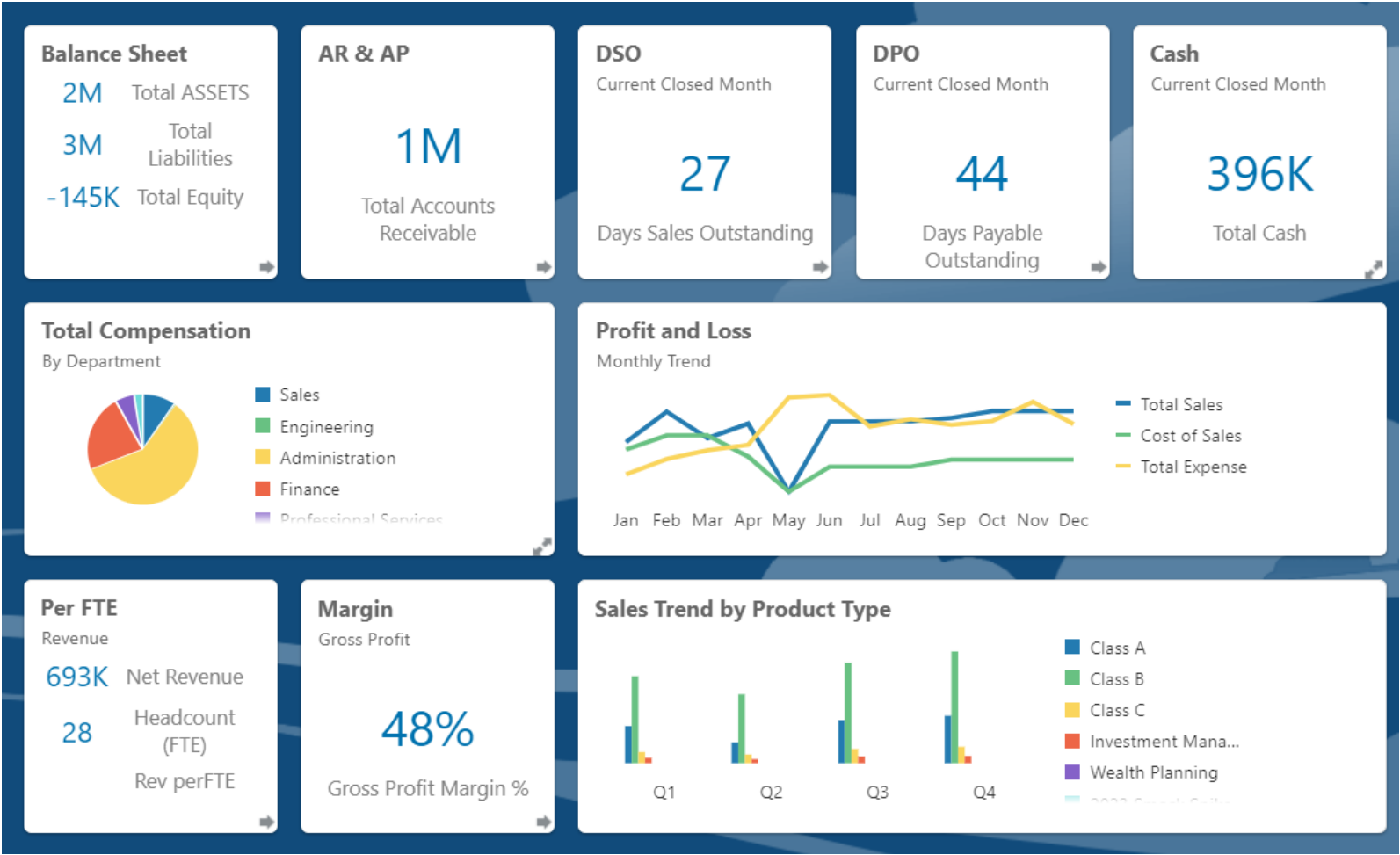
Oracle Acquisition of Hyperion
– 2007 \$3.3B

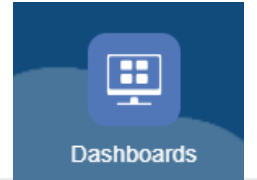
1,600+ NetSuite Customers
Worldwide



NSPB | Complete Solution







Include up to **6** forms
that dynamically
update

Include up to **9** charts
or tiles.

Switch easily between
using the **design
mode** and **runtime
mode**

Chart Types: area,
bar, bubble, column,
combination bar and
line, doughnut, funnel,
gauge, scatter, radar,
etc.

Control Dashboard **layout**
Drill down into detail
Customize the **colors** and
line width

NSPB | Dashboards



Dashboard 1.0

- Add links to dynamically display external Web pages.
- Include explanations of data called Commentary in the dashboard.
- Tag a form as master and then filter members from the master form to detail forms or charts within the same dashboard.



Dashboard 2.0

- Add hierarchical labels in charts.
- Use a logarithmic scale in relevant chart types.
- Add a secondary Y-axis in relevant chart types.



HiFrame - The Hyper IFRAME extension!

addownit.com

★★★★★ 7 | Productivity | 4,000+ users



CARAVEL

BPM Technology Solutions

DEFINITION

An exception to the existing member security

Applying cell-level security can deny access to cells that a user would normally have access to due to their regular security

USE CASE



Department Manager:

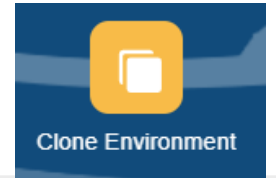
Write Access to all accounts except for Compensation (Read-Only)

EXCEPTIONS

Service Administrator

Can define and assign cell-level security rules to any user or group

Cell-level security doesn't apply



FEATURE

- **Screen-based way to clone an environment**
- **Options:**
 - Identity domain artifacts (users and predefined role assignments), and contents of the inbox, outbox, and stored snapshots.

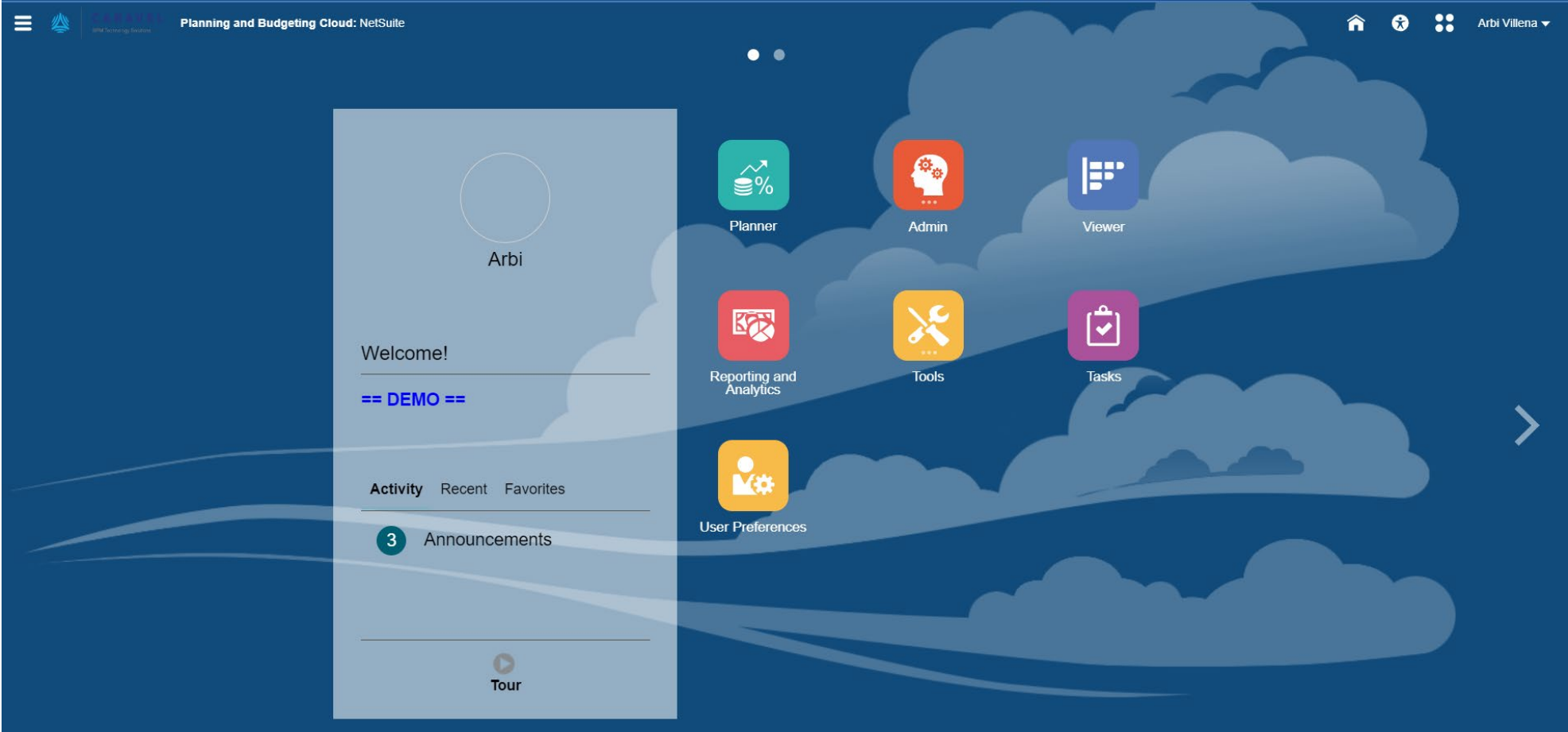
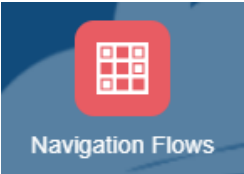
Supported Cloning Scenarios:

- Production to test cloning
- Test to production cloning

Which Snapshot Can Be Cloned?

Artifact Snapshot

NSPB | Navigation Flow



NSPB | Action Menu

DEFINITION

Right-click (or action) menus and associate them with forms, enabling users to click rows or columns in forms and select menu items to →

- **Launch another application, URL, or business rule, with or without runtime**
- **Move to another form**
- **Move to Manage Approvals with a predefined scenario and version**
- **Open Job**

MENU ITEM TYPES

URL
Form
Business Rule
Manage Approvals
Dashboard
Previous Form
Copy Version



Questions & Wrap-Up



Upcoming Webinars | Caravel Contacts



09/21/23



Caravel IP: Shared Vendor Bill

10/05/23

Automated Cash Application

10/26/23

Outsourced Accounting Services

11/09/23

NetSuite Analytics Warehouse

Caravel Contacts



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THANK YOU!

