

Bankrate, Inc.

NetSuite Change Management

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Change Management



WHY IS THIS EVEN NECESSARY?

- Your users will take advantage of you
- You have a boss, right?
- Your users have bosses too, right?
- I have auditors!
- Did I mention... I have auditors!!

Setup of Change Management

Change Management Setup



GENERAL SETUP

- Users must be enabled to log, or approve, a change request
- All data is logged around what is to be changed in a custom record
- Approvals happen via workflow
- Reporting on changes is the end goal

Employee Setup



- Activities
- Payments
- Contract Renewals
- Transactions
- Lists**
- Reports
- Documents
- Setup
- Customization
- Avalara
- Fixed Assets
- Implementation
- Piracle Pay
- Support



EXPORT TO OPENAIR

mail | Phone | Address

EMAIL	MOBILE PHONE	ADDRESS
OFFICE PHONE	IP PHONE EXT	

Classification

SUBSIDIARY	DEPARTMENT	DISTRICT
THEATER & BU		
EMPLOYEE GLOBAL ID	PIRACLE SIGNATURE FILENAME	
ADP ID		

- Access
- Communication
- Address
- Human Resources
- Workflow**
- Related Records
- System Information
- Piracle Pay ACH

Journal Entry

JE APPROVER

Sales

REV REC SUPERVISOR <input type="checkbox"/>	EMEA DIRECTOR <input type="checkbox"/>	LEGAL <input type="checkbox"/>
ACCOUNTING MANAGER <input type="checkbox"/>	EMEA VP <input type="checkbox"/>	LEGAL VP <input type="checkbox"/>
RENEWALS MANAGER <input type="checkbox"/>	CONTROLLER <input type="checkbox"/>	CFO <input type="checkbox"/>

Purchasing

VENDOR BILL APPROVER <input type="checkbox"/>	CEO <input type="checkbox"/>	FINANCE PURCHASING APPROVER <input type="checkbox"/>
COO <input type="checkbox"/>	SVP FINANCE <input type="checkbox"/>	SENIOR ACCOUNTANT (AP) <input type="checkbox"/>

Tickets

APPROVER <input type="checkbox"/>	REQUESTER <input checked="" type="checkbox"/>	ADMIN REVIEWER <input checked="" type="checkbox"/>
PROJECT MANAGER <input type="checkbox"/>		

Custom Record Setup



Tickets

Requester to Complete

REQUESTED BY
 ON BEHALF OF

* TYPE OF REQUEST

* ACTION NEEDED/PRODUCT AREA

* SEVERITY

* DESCRIPTION AND BUSINESS JUSTIFICATION

EXISTING EMPLOYEE

NEW EMPLOYEE

ROLE REQUESTED

NetSuite Admin to Complete

ADD/EDIT SCRIPT
 ADD/EDIT FIELD
 ADD/EDIT ROLE/PERMISSIONS
 TALK TO MANAGER/EMPLOYEE

ADD/EDIT WORKFLOW
 ADD/EDIT RECORD
 REPORTING
 OTHER - PLEASE DESCRIBE BELOW:

SANDBOX USED FOR DEVELOPMENT

ASSIGNED TO

FUNCTIONALITY REPORTING

LEVEL OF EFFORT

EXPECTED COMPLETION DATE

ADMIN NOTES

ON HOLD

Notifications (Admin)

NOTIFICATION TYPE

MESSAGE

USE ADMIN NOTES

Approval History | Files | System Information | Workflow | Tasks

Approval

MANAGER APPROVAL DATE
 MANAGER APPROVER

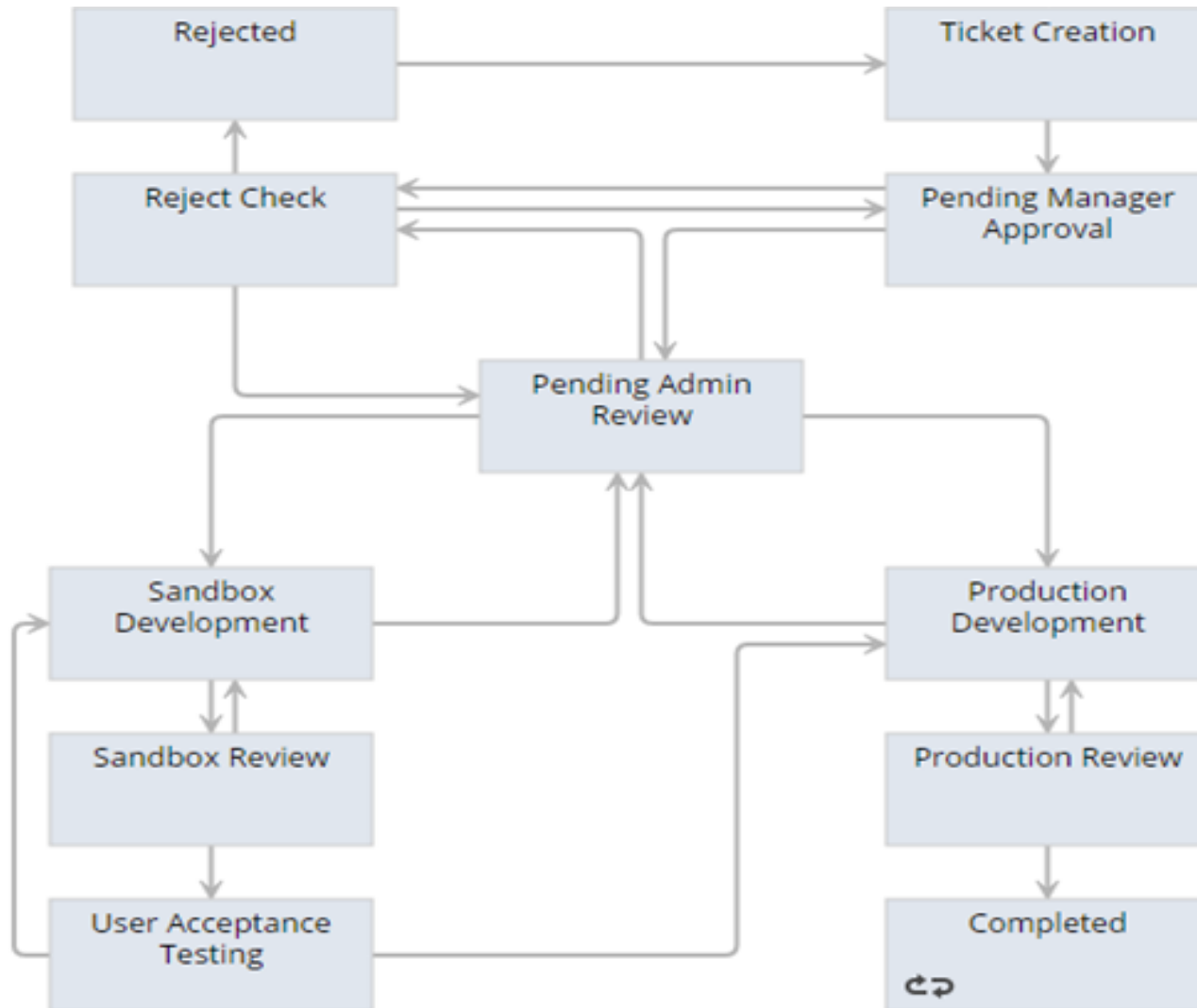
Sandbox

SANDBOX DEVELOPMENT DATE
 SANDBOX DEVELOPER
 SANDBOX REVIEW DATE
 SANDBOX REVIEWER
 USER TEST DATE
 USER TESTER

Production

PRODUCTION DEVELOPMENT DATE
 PRODUCTION DEVELOPER
 PRODUCTION REVIEW DATE
 PRODUCTION REVIEWER

Workflow Approvals



Final Thoughts/Observations

NetSuite Change Management



RECAP

- **Audit time significantly decreased**
 - Saved \$\$
 - Confidence in Process
- **Streamlined Work flow**
 - Not a project management tool
 - Visibility into upcoming tasks
- **Nothing lost in translation**
 - All request detail is timestamped & retained
 - Any backup is stored with the request

Thank you
