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# Adaptive Planning 2013.2 Release Notes

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# Adaptive Planning 2013.2 Release

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The 2013.2 release from Adaptive Planning launched September 13, 2013. It includes a host of updates to every major product:

- **New:** All products are now available in Portuguese.
- Adaptive Planning:
  - **New:** Formula support for account attributes
  - Improved version management
  - Enhancements for show/hide periods on sheets
- Adaptive Consolidation:
  - **New:** The Process Tracker
  - **New:** Reclassifications
  - **New:** Journal Entries
  - Eliminations and Trading Partner Enhancements
- Adaptive Discovery:
  - **New:** In-Context Editing
  - **New:** Freeform dashboards
  - **New:** Grid dial
  - **New:** Snapshots

See below for more detailed descriptions of each of these updates, or see our [support site](#) for full documentation.

## Adaptive Planning Updates

Adaptive Planning has an entirely new feature and two sets of changes.

### Formula Support for Account Attributes

Formulas can now reference account attributes. This helps you write shorter, more elegant formulas.

For example, you can now write a formula that references only those expenses that should be included in Accounts Payable:

`ACCT.Expenses[AP=Yes]`. This formula sums up all accounts below the Expenses account with the attribute AP set to the value Yes.

For more information about support for account attributes, see the [Administrators Guide](#).

### Improved Version Management

New version creation options make creating new versions more efficient and flexible than ever. Choose any version (not just the default) as the source of the new version, then decide if you want to copy all data and formulas, notes, splits, and other options into the new one. You can also select not to copy anything and create an entirely blank version.

These new options allow administrators to:

- Copy some or all of the formulas, sheets, notes, modeled rows, and other data from the source version into the new version.
- Add the new version to existing reports that include the source version

### Show/Hide Enhancements

There are several enhancements to sheets in the show/hide periods function. Administrators can provide a default time range for sheets to display to users who have not saved their own preferences for a particular sheet and version, and there are more granular options for setting the time range.

## Adaptive Consolidation Updates

Adaptive Consolidation has several important new features in this release!

### Process Tracker

The Process Tracker is a collaborative tool that makes processes such as the financial period close, annual budgeting cycle, or quarterly budget review a team sport.

- Define deliverables, assign them to users, monitor their status, and track their closure.
- Use the task copy function to expedite creation of repetitive processes like fiscal period close.
- Separate task assignee and task completed data for transparency into task activities
- Use at-a-glance graphs to see visual, up-to-the-minute process status, progress, and task completion information.

The Process Tracker is mobile-optimized to increase accountability, involvement, and collaboration. It's also time-zone aware, so users see dates and times according to their geographic location.

For more information on the Process Tracker, please see the [Consolidation Guide](#).

### Journal Entries

The new Journal Entries feature allows you to create special sub-versions of actuals which are designated to only allow data entry via formal journal entries. This allows you to restrict manual adjustments to only accept balanced entries while also presenting them in the familiar form of accounting-style journal entries. Journal Entry sub-versions are created by clicking the New Journal Entries Version icon on the Manage Versions page.

For more information on journal entries, please see the [Consolidation Guide](#).

### Eliminations Trading Partner Improvements

Rather than requiring you to create a trading partner dimension with values for each partner, Adaptive Consolidation now has a system dimension which automatically generates values for partners. When a level is tagged as representing a trading partner, a value is created for the dimension using the level's name.

The dimension is called Trading Partner by default, but administrators can change it to something more familiar to users.

For more information on eliminations and the new system attribute, please see the [Consolidation Guide](#).

## Reclassifications


Adaptive Consolidation now includes a simpler method for reclassifications. Use reclassification rules to transfer the balances of a set of accounts to another account when those values roll up the organization hierarchy, allowing you to more easily and intuitively manage your multi-entity consolidation across varying GL account trees. Rules can be designed to be limited in scope or change over time if necessary, making maintenance of your organization's financial consolidation policies a snap!

For more information on reclassification rules, please see the [Consolidation Guide](#).

## Adaptive Discovery Updates

Adaptive Discovery gets a number of exciting new features in this release.

### In-Context Editing

Users can now add and edit visual components without having to leave the dashboard. Click the In-Context Editing icon  to open the editing menus, then click the component you want to edit. The editing menus will populate with the appropriate options, and you can make changes just like you would in the Visual Designer.

For more information, please see the [Adaptive Discovery Guide](#).


### Freeform Dashboards

Freeform dashboards, a new, more flexible form of the standard dashboard, are now available. Drag and drop dials directly onto the dashboard in the Visual Designer, without using ribbons. Make the dials large or small, and arrange them in whatever way suits your needs best.

### Grid Dial

Create a report-like a dial and add it to your dashboard with the grid chart. Drag in the accounts, dimensions, metrics, and elements like variance calculations you need from a special new editor and drop them where you want them. You can also add filters, conditional formatting, zones, and summary data. The end result is a grid that users can sort (by clicking column headers)





and filter (using the Modify Filter feature available through the action icon ).

For more information, please see the [Adaptive Discovery Guide](#).


## Snapshots

Now you can take a snapshot of your dashboard or a specific dial, then save it to a repository, download it in a variety of formats, or send them by email. You can also schedule snapshots to be taken at predefined times and have them sent to specific users by email, or saved for future reference.

To take a snapshot of a dial, mouse over the action icon , then click **Dial Snapshot**.

To take a snapshot of a dashboard, click the options icon  and select **Dashboard Snapshot**.

Both of these actions take you to the Snapshot Manager, where you can save, download, send via email, or schedule the snapshot:

Saved snapshots can be accessed through the new Media panel, which can be expanded or hidden by clicking the double arrow icon  on the right side of the screen.

For more information, please see the [Adaptive Discovery Guide](#).

