

# 2014.2 Release Notes

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# 2014.2 Release Notes

The Adaptive Insights 2014.2 release debuted on September 19, 2014. It offers a variety of new features and enhancements:

- **Adaptive Planning and Adaptive Consolidation**
  - New, Java applet-free sheets with customizable breakback are here for all users!
  - Improved dimension and attribute administration
  - Enhanced online help
  - A new welcome portal
  - Allow file upload based on file extension
  - Inclusion of unavailable levels in actuals overlay
- **Adaptive Discovery**
  - Configurable calculated metrics on the fly
- **Adaptive Integration: New Unified Data Integration for Adaptive Discovery**
- **Adaptive Authentication: Single Sign-On (SSO) based on SAML 2.0**

For details on each of these, see below.



**Note:** As of the 2014.2 release, the Adaptive Suite no longer supports Internet Explorer 8. If you currently use Internet Explorer 8, we recommend that you upgrade to a newer version of Internet Explorer or switch to Firefox.

## Adaptive Planning and Adaptive Consolidation

### New Sheets

The redesigned sheets previewed in the 2014.1 release are now available to all users. They have a fresh new look, all of the features you're used to seeing on classic sheets, and more. Sheets now have a look and feel familiar to Excel users, maximized screen space, and new features like quick calculation of selected cells, flexible new breakback options, and numbered rows for easy reference. The new sheets also have a Java applet-free design, so most end users - those who enter data on sheets and view reports - will no longer need Java installed in their browsers.

You'll notice many differences between the old sheets and the new ones, but here are the major ones:

- Administrators can now set a default breakback method for their instances, which avoids having to use a dialog box to set the same breakback method every time a rollup value is entered. You can also now create new, custom breakback assumptions.

- The Formula Bar is now collapsible. To expand or collapse the Formula Bar, click the arrow in the sheets toolbar . You can also extend the Formula Bar by clicking and dragging its lower right corner.
- Calculations for a range of selected cells display immediately in the sheet footer. Mouse over the lower right hand box in the sheet footer to see the available calculation types, then click to set a new default. When you leave the sheet, the default will reset to sum.
- All sheets now allow you to edit a parent level directly by select the level identified by the word **Only** in the level selector, instead of clicking **Edit Level**.

- The **Copy** icon has two states:  . Left: copy formula, right: copy value.

Copy, cut, and paste have been removed from the right-click context menu. You can now toggle between the two forms of copying, and use the following keyboard shortcuts, for Windows (if you are using another platform, use its copy, cut, and paste shortcuts):

- CTRL-C Copy
- CTRL-V Paste
- CTRL-X Cut

For a quick, in-app reminder of the keyboard shortcuts, click the keyboard legend icon  in the lower right corner of the screen.

- The Notes icon also has two states:  . Left: no notes present (click to add), right: notes present (click to view or add).
- Adding a dimension value at the time of creating a split row is not supported. However, after a split row has been created, dimension values can be assigned from the dimension column.
- There are now row numbers down the left side of the sheet.

For a more detailed look at the new features, including documentation, [click here](#).

## Improved Dimension and Attribute Administration

The 2014.2 release includes a Java applet-free redesign of the dimension and attribute administration screens. There is now a search function which returns all search results together and displays where each value can be found in the dimension or attribute hierarchies. You can optionally focus the list on a specific dimension or attribute to manage or search within that object, or search the entire list.

For more on the new Dimension and Attribute Administration screens, see the New Admin Trees QuickSheet available on the [QuickSheets and Helpful Hints](#) documentation page.

## Enhanced Online Help



Our online help now has search capabilities, table of contents, and a glossary to help you find what you need faster. To access the help, click the online help icon (shown at left) in the upper right corner of most Adaptive Suite screens.

## Restricted File Upload

Administrators now have the option to restrict file uploads based on file name extensions. To enable this setting, go to **Admin > General Setup > Setup Details** and check the box **Restrict file uploads by extension**.

When the checkbox is clicked, a text box to enter a comma separated list of file name extensions will appear. This text box will have a default list of file name extensions, which can be modified by the administrative user. Those extensions are: XLS, XLSX, XLSM, TXT, PDF, DOC, DOCX, PPT, PPTX, HTML, RTF, XML, ZIP, GZIP. With this option, only files with extensions present in the text box will be allowed for upload by the users of the instance.

There is no change in file upload behavior if you do not enable the new setting.

## Inclusion of Unavailable Levels in Actuals Overlay

The previous release, 2014.1, introduced the capability to have organization levels available to some versions but not others. This enables administrators to “retire” levels that are no longer needed, hiding them from more recent or current versions, or to add new levels without having them appear in older versions.

With the 2014.2 release, you can now indicate whether or not the actuals of a level excluded from a plan version should be included in the actuals overlay applied to that plan version.

When enabled, actuals of a level excluded from a plan version will be included in the actuals overlay of that plan version.

When disabled, actuals of a level excluded from a plan version will also be excluded from the actuals overlay of that plan version.

Go to **Admin > Manage Versions** and select the plan version whose actuals overlay you want to include unavailable levels. Check the **Actuals Overlay includes unavailable levels** check box, then click **Save**.

**Options**

Fiscal year Jan - Dec

Left scroll limit FY 2012

End of plan FY 2013

Start of plan Jan-2013

Lock leading months through  Set to completion month

Default

Audit trail

**Actuals Overlay includes unavailable levels**

Actuals version for overlay Actuals

**Figure 1:** The Options area of Version Details.

## A New Welcome Portal

The 2014.2 release includes an updated Welcome portal with lots of helpful resources and information so you can make the most of the Adaptive Suite. Read Adaptive News for tips and tricks, upcoming webinars, interesting blogs, and more. Become an Adaptive Torch-bearer and earn points and rewards for sharing your Adaptive story and knowledge with other Adaptive users in your industry. Check out the most popular articles in the Knowledge Base and documentation to quickly get answers to your questions. The Welcome portal is the default start page for all new users, but if you set a different start page, you can access the Welcome portal anytime by clicking the navigation icon > **Support > Welcome**.

## Adaptive Discovery

The two forms of Adaptive Discovery have been renamed to help distinguish them:

- **Adaptive Discovery Professional** is Discovery using data from Adaptive Planning and/or Adaptive Consolidation.
- **Adaptive Discovery Enterprise** is Discovery using data from non-Adaptive data sources.

## Configurable Calculated Metrics

Both Discovery Professional and Discovery Enterprise users now have the ability to create custom calculated metrics while using Edit in Place mode or the Visual Designer. For example, you might want to calculate gross margin, but you do not have an account set up in Planning/Consolidation. Calculated metrics enable you to create a gross margin metric directly in Discovery.

## Adaptive Integration

Adaptive Integration is a new platform that offers a unified experience to manage all aspects of data integration across the Adaptive Suite through a single web-based UI. In 2014.2, you can import data into Adaptive Discovery Enterprise from a wide variety of sources, including spreadsheets, JDBC-compliant databases, and Netsuite. It provides the ability to define connections to data sources, apply transformations, prepare data, map staging columns to metrics and dimensions, define tasks to run data imports either on demand or on a schedule, create scripted data sources and scripted loaders, and much more.

You can learn more about Adaptive Integration by reading the Adaptive Integration Guide, available on the [Adaptive Suite Administrator Guides](#) documentation page.

## Adaptive Authentication

Adaptive Authentication, a new module available for the Adaptive Suite, enables users to sign on only once into the Adaptive Suite using your company's standards-based single sign-on (SSO) mechanism. Adaptive Authentication provides standards-based SSO, which allows users to enter their login and password once into their Identity Provider and access the Adaptive Suite without having to re-enter their login credentials in Adaptive. With support for SAML 2.0 (a standard for exchanging user authentication and authorization information), Adaptive works with single sign-on solutions like Okta and Microsoft AD-FS to accept authentication information. With Adaptive Authentication, you can now participate in the user convenience afforded by SSO with Adaptive.

You can learn more about Adaptive Authentication by reading the SAML/SSO Implementation Guide, available on the [Adaptive Suite Administrator Guides](#) documentation page.

## Miscellaneous Minor Changes

The order of the **Overview** and **Task** links in the Process Tracker section of the navigation menu is now reversed, with **Overview** above **Tasks**.