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2015.3 Release Notes

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v.2015.3

2015.3 Release Notes

The Adaptive Insights 2015.3 release debuted on September 4, 2015. It offers these new features and enhancements to The Adaptive Suite:

- Adaptive Planning and Adaptive Consolidation
 - Search on Sheets
 - API to Create and Update Adaptive Planning Accounts
- Adaptive Discovery
 - Expanded Data Setting Editors and Chart Editors
 - Period Summary Table Dial

Adaptive Planning and Consolidation

This section describes the features and enhancements for Adaptive Planning and Adaptive Consolidation included in the 2015.3 release.

Search on Sheets

The 2015.2 release added a search box to standard sheets, and the 2015.3 release adds it to cube and modeled sheets as well. Just type in part or all of a number, name, or other

item and press Enter or click Search  to jump to the first row where that search string appears. Press Enter or click Search again to skip to the next instance of the string.

The search box appears in the toolbar, at the end of the row of icons. You can see its location in Figure 1 and Figure 2:

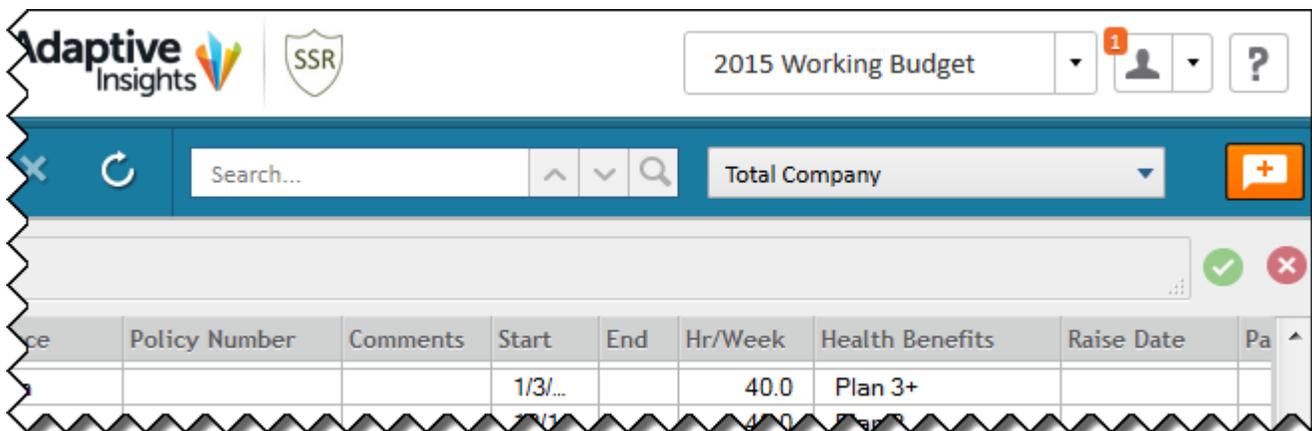


Figure 1: The search bar on a modeled sheet.

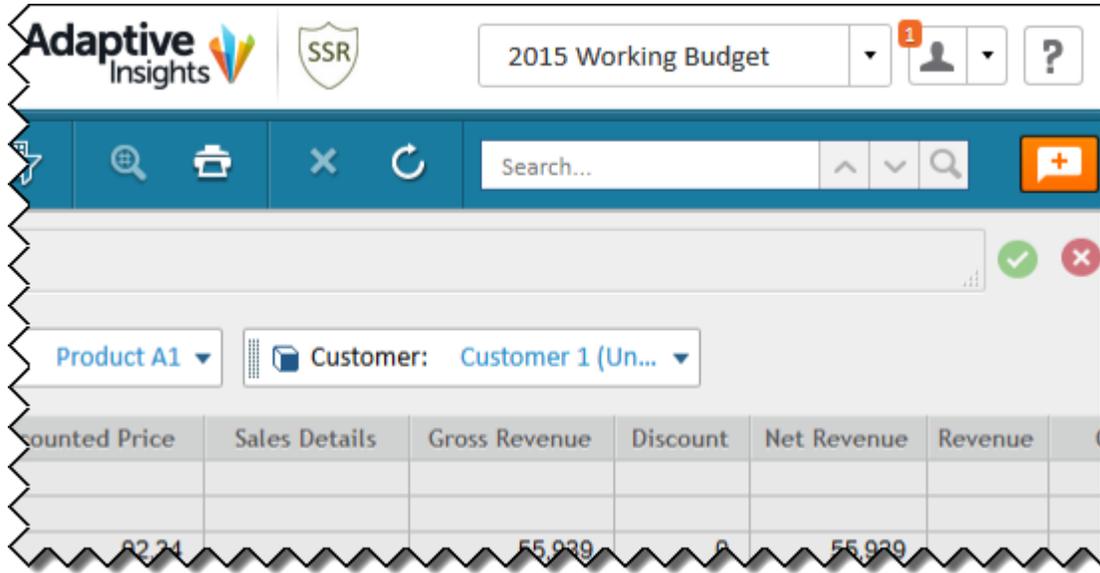


Figure 2: The search bar on a cube sheet.

API to Create and Update Adaptive Planning Accounts

The Application Programming Interface (API) is a specification intended to be used as an interface by software components to communicate with each other. This lets a developer extend Adaptive Planning to work closely with other systems and support integration-related use cases that are not in the standard user interface.

For example: a customer wants to synchronize their ERP accounts programmatically with Adaptive Planning. This would allow for the creation of a single version of the truth. If the Account name or description is updated within the ERP system it can be synchronized with the push of a button. If a new account is created in the ERP system then, based on the program, it can be added to Adaptive Planning.

The new calls let developers programmatically create General Ledger accounts and update certain account properties.

Adaptive Discovery

This section describes the features and enhancements for Adaptive Discovery included in the 2015.3 release.

Expanded Data Setting Editors and Chart Editors

The Data Settings and Chart editors now include many formatting options for changing axes, formatting charts, and more when you are working with line, column, and area charts.

To try out the new feature, go to Discovery and find a line, column, or area chart you can edit. Click Edit in Place , then click the dial to select it. You can use the new tabs in the **Data Settings** and **Chart Settings** editors to set things like column styles, label positions, Y-axis properties, how empty points are displayed, background and gradient colors, major and minor gridlines, and the format of the dial's legend.

Period Summary Table Dial

The new Period Summary Table dial consists of a grid, with time on the horizontal axis and metrics on the vertical axis. It lets you create a detailed spreadsheet on your dashboard, and customize it to fit your needs. Figure 3 shows a basic sales metric period summary dial:

My Period Summary Table ✕																	
Metric	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	2015
Enquiry Count	7.5 MU	6.2 MU	5.2 MU	18.9 MU	8.0 MU	5.2 MU	5.1 MU	18.4 MU	3.9 MU			3.9 MU					41.2 MU
Lead Count	3.0 MU	2.4 MU	2.1 MU	7.5 MU	3.2 MU	2.1 MU	2.0 MU	7.3 MU	1.6 MU			1.6 MU					16.4 MU
Quote Count	1.2 MU	1.0 MU	0.8 MU	3.0 MU	1.3 MU	0.8 MU	0.8 MU	2.9 MU	0.6 MU			0.6 MU					6.5 MU
Sale Count	481.6 kU	391.2 kU	319.9 kU	1.2 MU	511.5 kU	340.2 kU	322.1 kU	1.2 MU	246.2 kU			0.2 MU					2.6 MU

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Figure 3: A Period Summary Table dial.

As you can see, the dial breaks the metrics down by months, with summaries for the quarters and a summary for the year as a whole so far. You can add any number of metrics to the dial, and use the **Appearance Settings** editor to format the rows, columns, headings, and data display to suit your preferences. You can also use the **Data Settings** editor to format specific metrics to be bold or in a different color to highlight them.