2016.2 Release Notes

v.2016.2.1

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The 2016.2 release debuted on April 15, 2016, and includes a number of enhancements and new features. These enhancements and features are:

Adaptive Planning and Consolidation

- In-Sheet Visualizations
  - Sparklines
  - Visualizations on Sheets
- View Account Dependencies
- Process Tracker Notifications
- Printable View for Comparison Versions
- Monthly Delta on Actuals
- Add New Versions to Report Parameters by Default
- Modeled Sheet Builder Assumptions Applet Replacement
- Audit Trail Applet Replacement
- Report Filter Builder Applet Replacement
- Allocation Applet Replacement
- Standard Sheet Admin Applet Replacement
- Announcement Page Improvements
- Excel Interface for Planning (Beta)

Adaptive Integration

- Upload/Download of Member Mappings
- Mapping Profiles
- Batch Editing of Staging Columns
- Scripted Export From Integration
- Source Identifiers and Display Names in Mappings
- Download Loader Output
- Option to erase GL Actuals, Cube Accounts, Custom Accounts and Cell Notes

Adaptive Discovery

- Attributes in Discovery
- Circular Gauge and Circular Meter Editors
- Printer-Friendly Dashboard Snapshot Export
- Customer Support Roles and Permissions
- Discovery Enterprise Windows Mobile Apps
- SAML for Discovery iPhone App

Adaptive OfficeConnect

- Cell Explorer for OfficeConnect

For details on each feature, see below.

Adaptive Planning and Consolidation

The features for Adaptive Planning and Adaptive Consolidation in the 2016.2 release are as follows.

In-Sheet Visualizations

This feature has two primary components: Sparklines and In-Context Analysis and Collaboration.

Sparklines

Sparklines offer a quick view of the trends associated with account values on standard and cube sheets. When turned on, they appear in the first column of the sheet as either a line or a bar chart, depending on your selection. When clicked, these small charts expand to provide a larger representation of the trend line. For editable sheet values, users can drag and drop points on the trend line as a way of doing visual data entry.

To turn Sparklines on for a sheet you are viewing, do the following:

1. Click Display Options .
   The Display Options dialog appears.
2. Click the **Sparklines** tab.
3. Select either line chart format or bar chart format.

4. Click **Apply**.

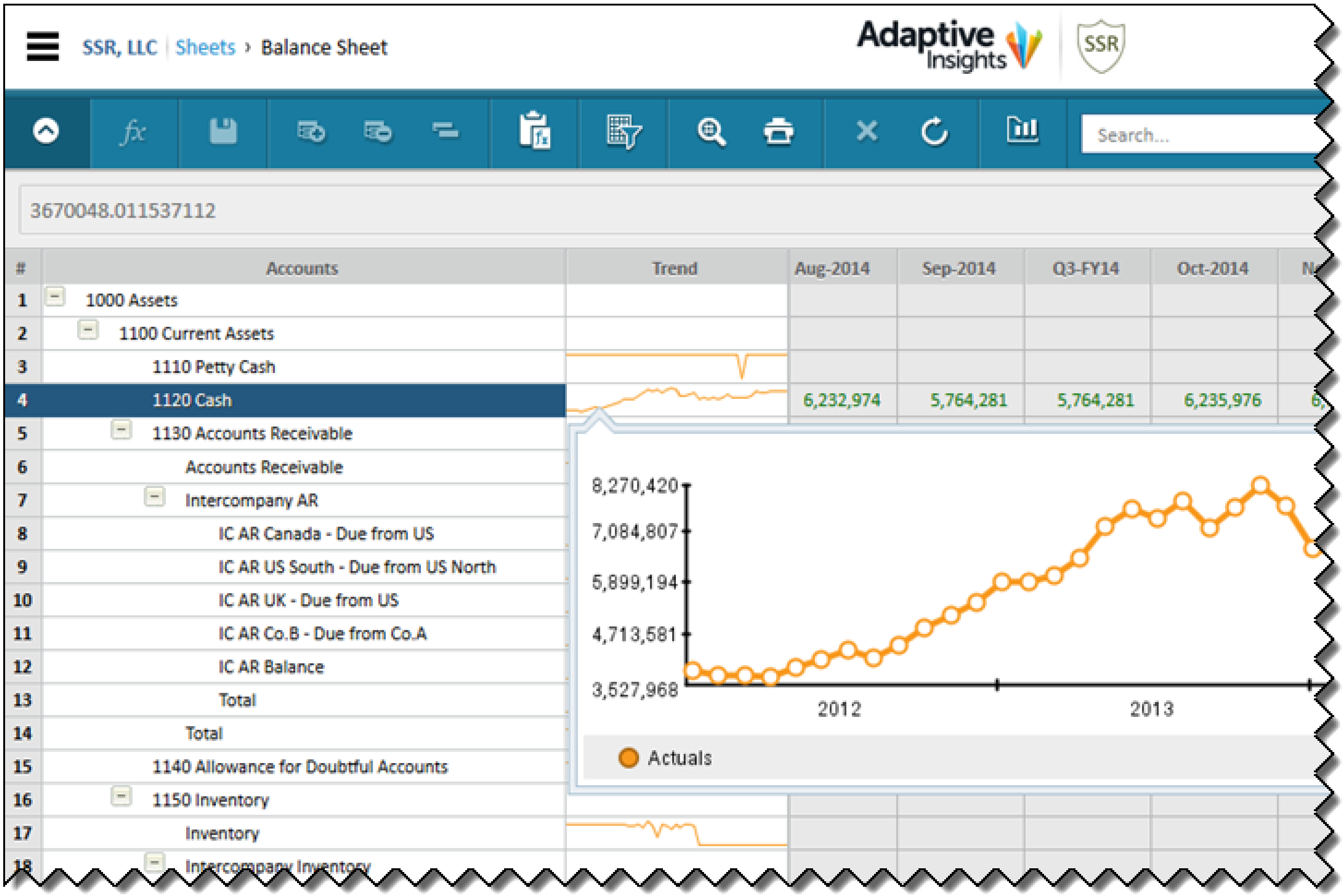

Figure 1: A standard sheet with Sparklines turned on, and the 1120 Cash account row clicked.

Visualizations on Sheets

Users with Discovery permissions can create charts on standard sheets with in-sheet visualizations and save them to their personal Discovery dashboard. You can also download a copy of the chart, expand it to fill the screen, and change the type of chart displayed (choose from column, line, area, bar, pie, and doughnut).

To create a chart in a standard sheet you are currently viewing, do the following:

1. Select the cells you want to be displayed in the chart.

   You can select by clicking the first cell, then shift-clicking the last, or by clicking and dragging.

2. Click Chart .

3. Click Chart Options to change the type of chart, chart detail level, and time breakdown.

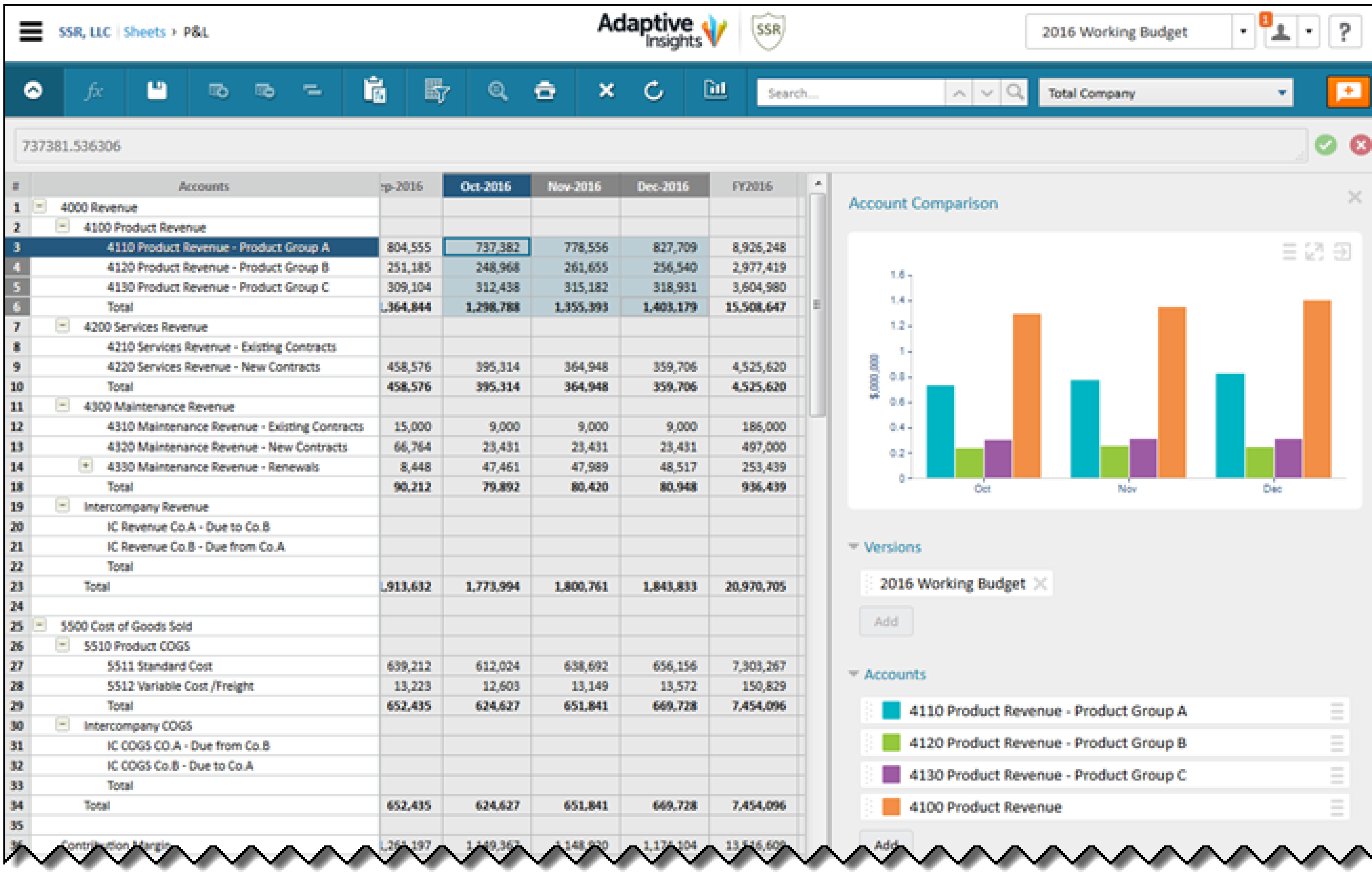

Figure 2: A sheet with a chart.

View Account Dependencies

Administrators can now find out where an account is used or referenced by clicking **View Account Dependencies** in the **Account Details** area of the Manage Your ... Accounts screen. The View Account Dependencies dialog displays the locations where the account in question is used in calculated accounts (standard, cube, modeled, and metric), shared formulas, cell-specific formulas in cube accounts, linked accounts, allocation rules, elimination rules, reclassification rules, and journal entries.

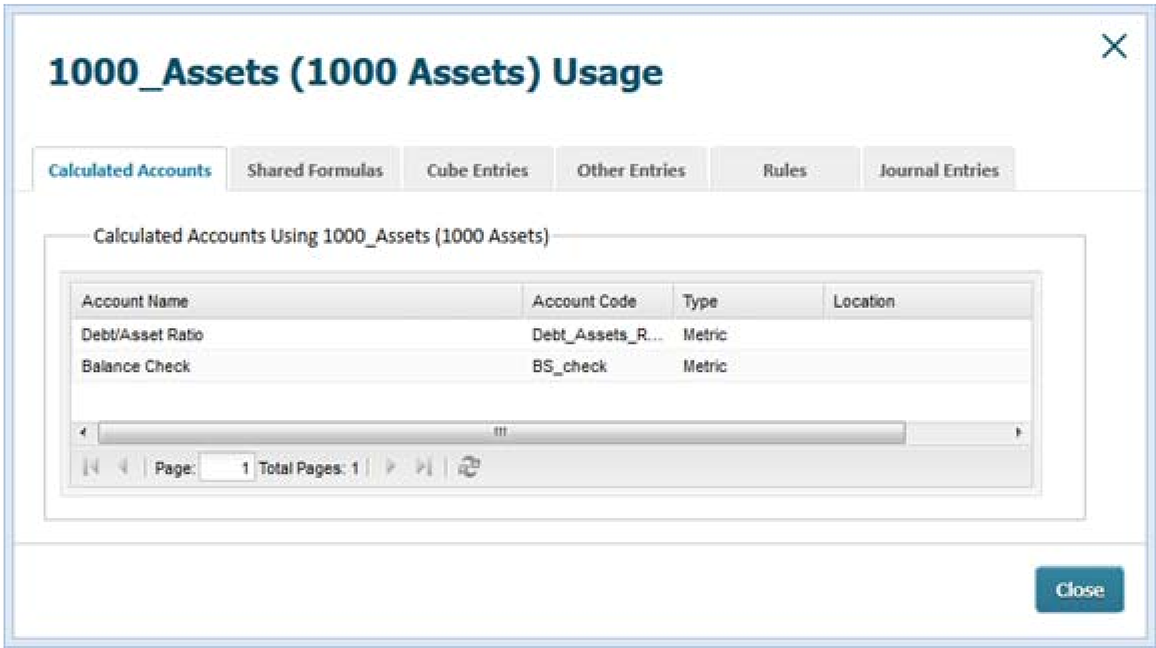

Figure 3: The View Account Dependencies dialog.

Process Tracker Notifications

Process Managers can now set email alerts to be sent to users when the workflow status changes for levels or sheets to which they have access, and when the user is assigned to Process Tracker tasks.

To enable this feature, check the **Workflow and Process Tracker alerts** box on the General Setup page.

Printable View for Comparison Versions

When you have enabled version comparison on a standard sheet, Printable View  is now available. Clicking Printable View exports the data in the sheet, including the comparison versions, to an Excel spreadsheet you can edit and print.

Monthly Delta on Actuals

Administrators can now set general ledger actuals balances to be calculated according to monthly delta, the same as for planning accounts. You can configure this from the Manage Your General Ledger Accounts screen, in the **Account Details** area.

Add New Versions to Report Parameters by Default

When administrators clone a version, the new version can be automatically added to report parameters. When the **Add as report parameter choice to all reports** check box is checked, the new version is added to all reports that have version as a parameter. When the check box is not checked, the new version is added to reports' parameters only if the source version is currently available within the parameter drop-down of the report.

Modeled Sheet Builder Assumptions Applet Replacement

The modeled assumptions sheet now features the applet-free user interface. All existing functionality is still available, and now you can also generate a printable view of the sheet, add cell notes, and use the Cell Explorer.

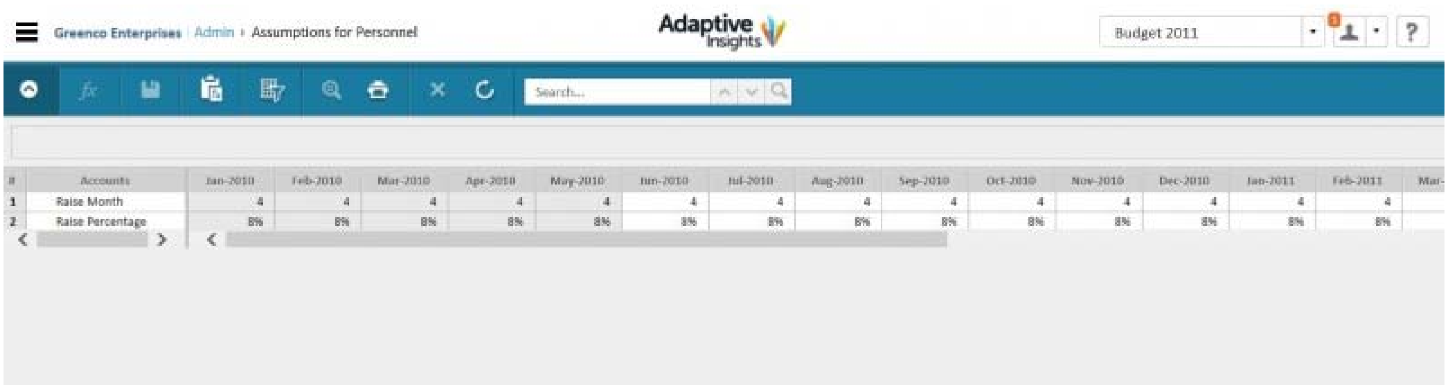

Figure 4: The modeled assumptions sheet screen.

Audit Trail Applet Replacement

The 2016.2 release brings the applet-free user interface to audit trail search. When you select **Audit Trail Search** from the **New Report** menu on the Report screen, the search dialog is free of Java applets and includes the search capability available elsewhere in the applet-free UI. The functionality is otherwise identical to the previous look.

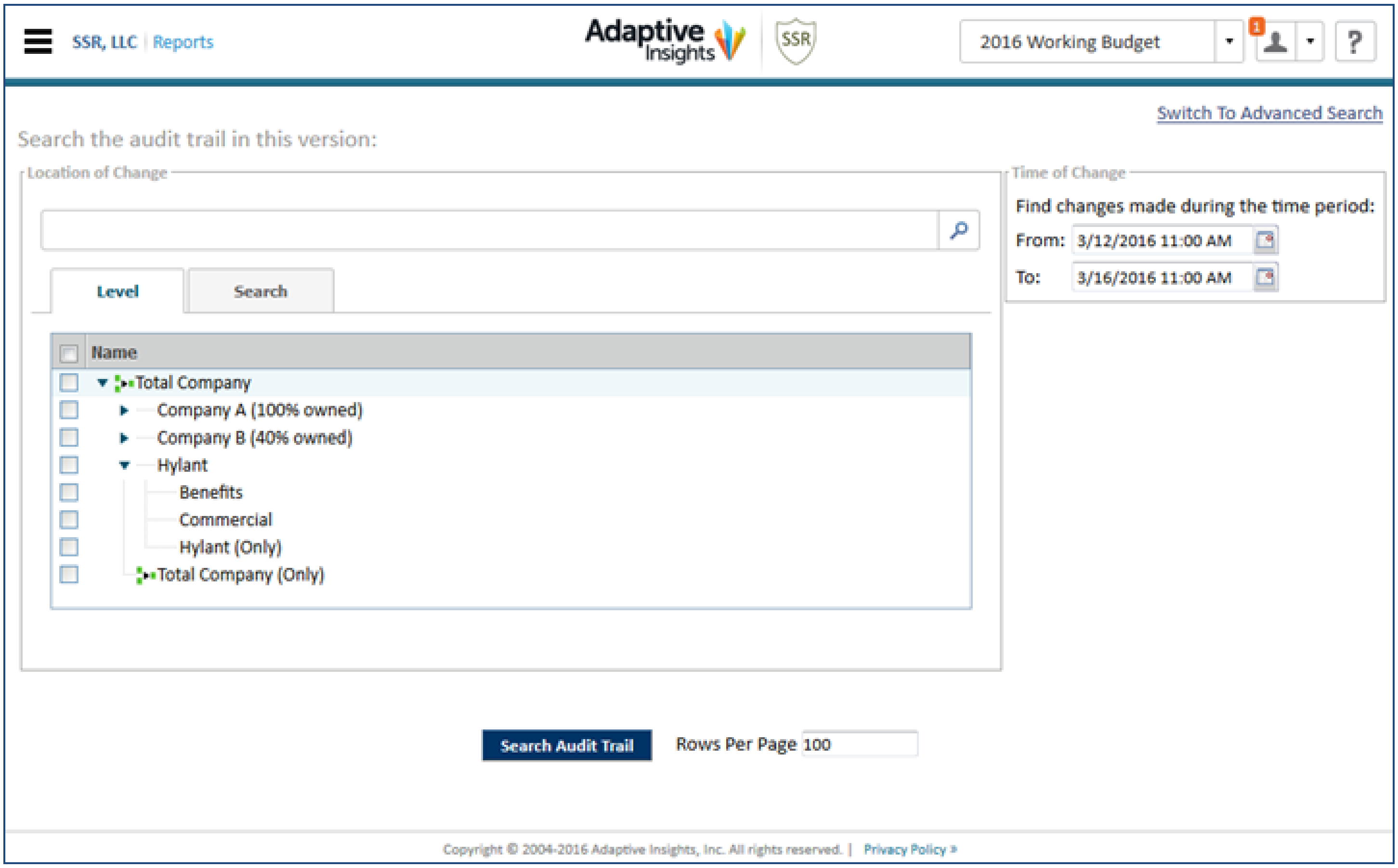

Figure 5: The new, applet-free Audit Trail Search dialog.

Report Filter Builder Applet Replacement

This release also brings the applet-free user interface to report filters. The Manage Filter dialog box lets users define filters for transaction and modeled reports, and it now does so without Java applets. You can access the Report Filter Builder from the Report Viewer screen.

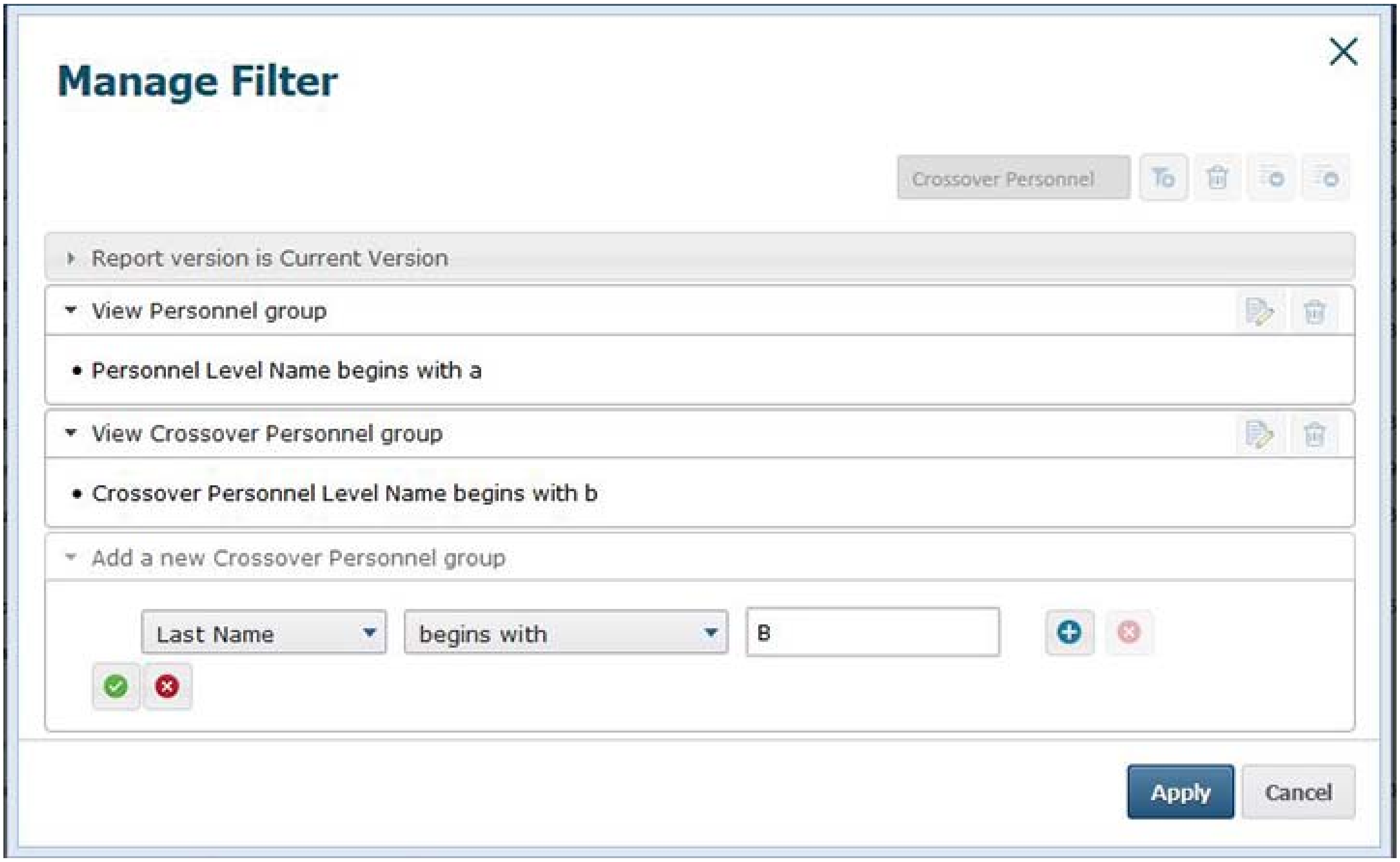

Figure 6: The new Manage Filter dialog.

Allocation Applet Replacement

The screen for creating and editing allocation rules is now applet free! The functionality remains the same: you set the allocation rule's source and target levels on the **Definition** tab, along with the allocate-in and allocate-accounts and the formulas used for allocateout value and weight. You define the versions, time span and if any dimensions need to be preserved for allocation on the **Scope** tab.

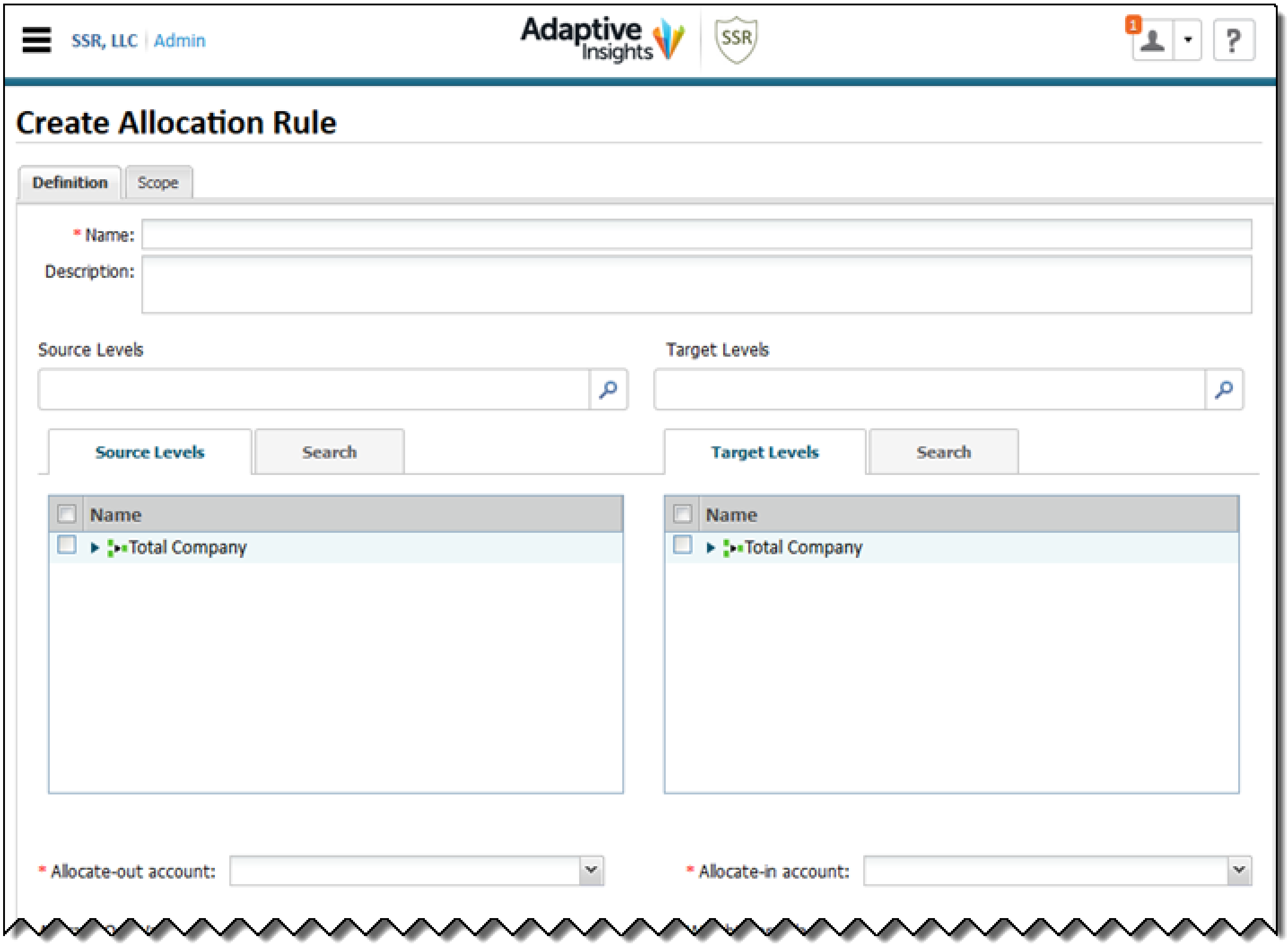

Figure 7: The applet-free Create Allocation Rule screen.

Standard Sheet Admin Applet Replacement

The Accounts Groups and Customization for Sub-Levels screens of the standard sheet builder are now applet free! Functionality remains the same, but the screens no longer use Java applets, and now feature the clean applet-free user interface.

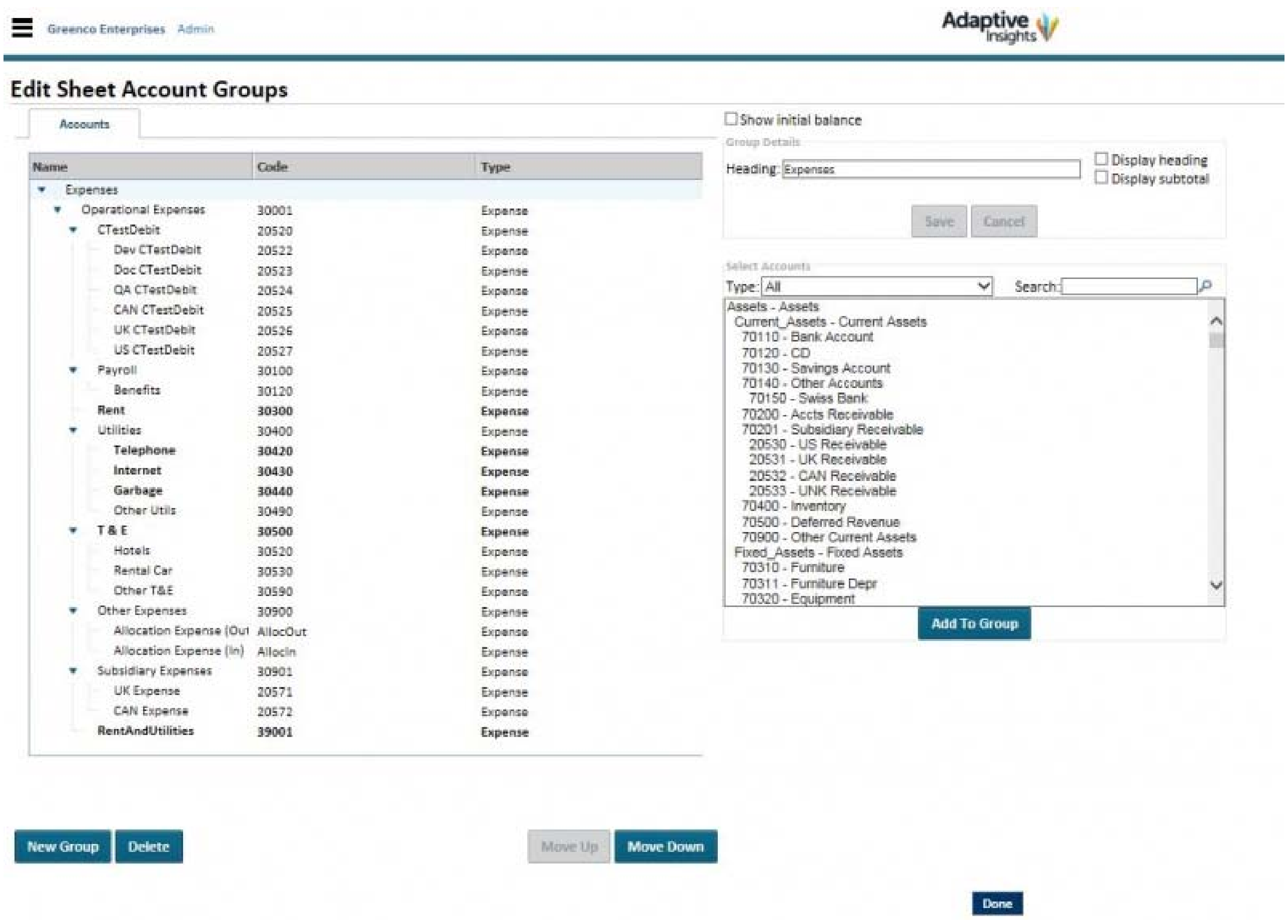

Figure 8: The applet-free Account Groups screen.

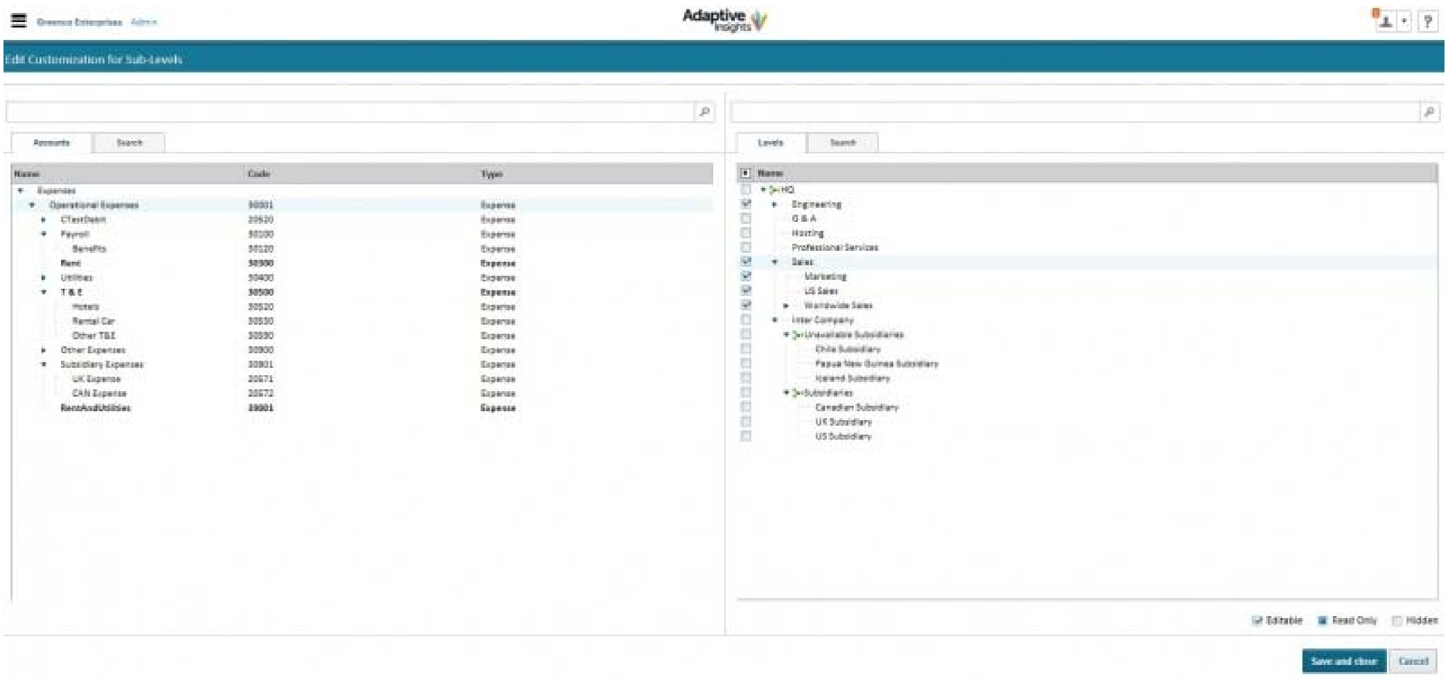

Figure 9: The applet-free Customization for Sub-Levels screen.

Announcement Page Improvements

You can now include any HTML file on announcement pages! Of course, it is your responsibility to only upload safe content. You should only give permission to upload files to users you trust.

Adaptive Integration

The features for Adaptive Integration in the 2016.2 release are as follows.

Upload/Download of Member Mappings

You can now perform bulk upload and download of member mappings to and from spreadsheets from within the Planning loader. When designers navigate to data member mapping UI for accounts, levels, and dimension members, they will have the ability to download a template that will allow them to enter source to planning mappings and then upload them into the member mapping UI. Designers can also download mappings from the loader into a spreadsheet.

Mapping Profiles

You can now create mapping profiles to isolate mappings from different source systems. For details on creating mapping profiles, see the Adaptive Integration Guide.

Batch Editing of Staging Columns

You can now select which staging columns to import from a list. Check or uncheck columns as appropriate to quickly set which columns will and will not be imported. Select **Manage Columns** from the data source drop-down to open the dialog, shown in Figure 10.

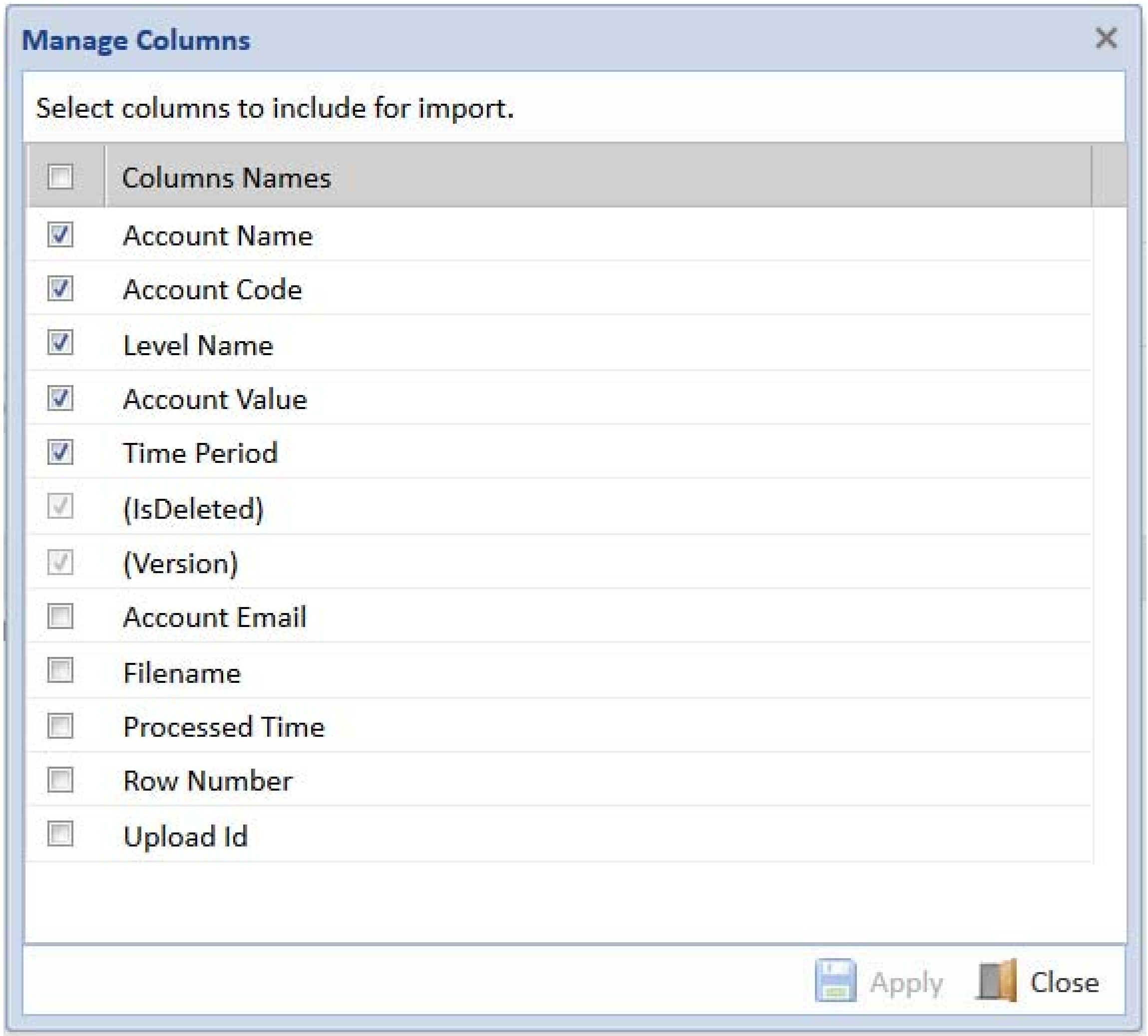

Figure 10: The Manage Columns dialog.

Scripted Export From Integration

You can now use a Pentaho Kettle ETL script to export data from Planning. There is a new export loader type within Integration that lets users of Adaptive's data agent/Kettle ETL to leverage Planning's export APIs to download data from Planning using a script.

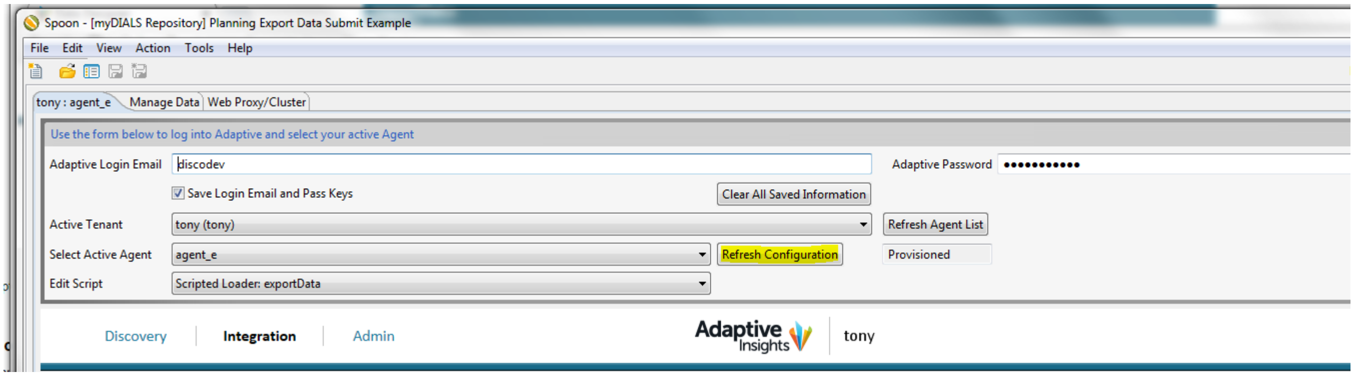

Figure 11: The Pentaho Kettle ETL script dialog.

Source Identifiers and Display Names in Mappings

This feature allows designers to include more than one source column as part of the mapping process. It expands the mapping UI within the planning loader to include both source identifiers and source display names as part of the mapping process. The source identifier column should be available whereas the source display name is optional for the mapping process. Data designers can complete the entire mapping process with just the source identifier column. The only requirement is that such a column contains unique values from the source. In cases where the source identifier column is not easily understood by designers, or if designers need further context around which entity the identifier is representing, then the designer can include an optional source display name column, which makes it easy to map source values. If the source display name column is used in the mapping, its values are used in the member mapping UI. Otherwise, the values out of the source identifiers are used as part of the mapping process.

Download Loader Output

Data designers can now download the output of a Planning loader as a spreadsheet, without moving the data into Planning or Consolidation. The results in the spreadsheet will be generated by running all steps of the loader, including importing data (if applicable), applying transformations and business rules. This lets data designers manually validate data before actually moving data from the staging area into Planning.

To do this, select **Preview loader output** in the Actions menu. Make your selections in the Preview Loader Output dialog, and click **Preview loader output.**

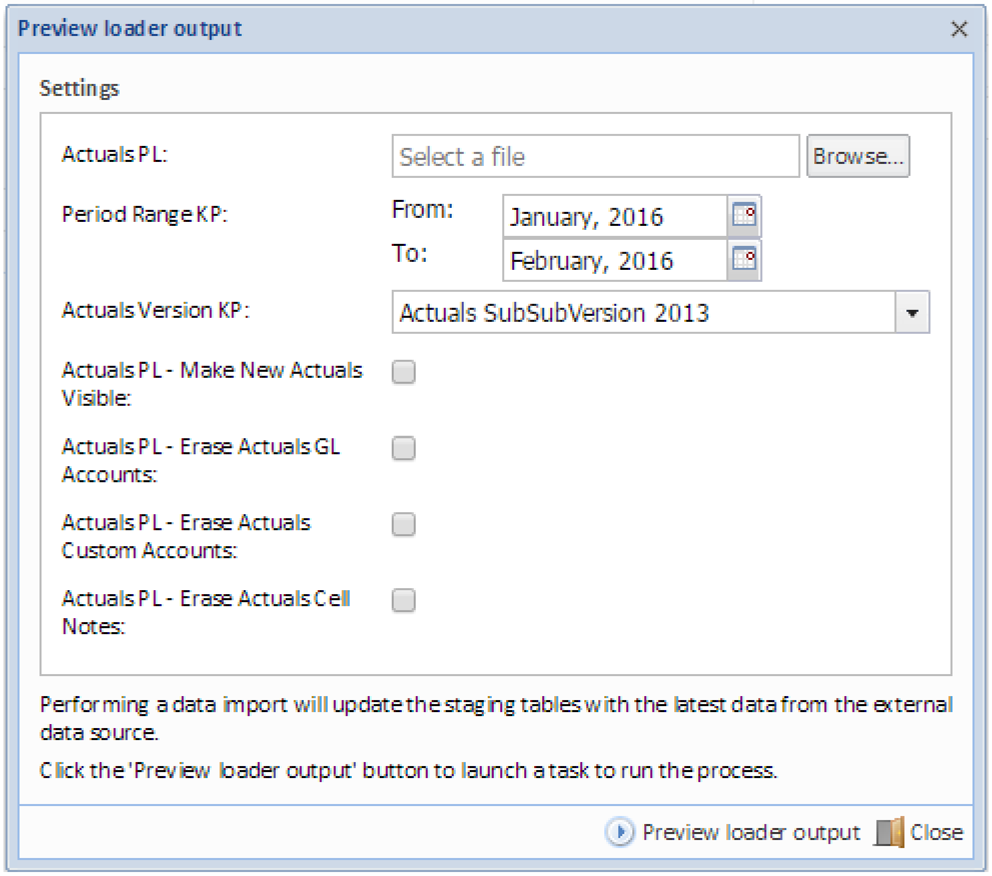

Figure 12: The Preview Loader Output dialog.

Option to erase GL Actuals, Cube Accounts, Custom Accounts and Cell Notes

The Planning loader can now erase general ledger account actuals, cube accounts, custom accounts, and cell notes before loading data from Planning and Consolidation.

Excel Interface for Planning (Beta)

Users can now use Excel to view and enter data in standard and modeled sheets from Adaptive Planning. Cell formatting and colors are consistent between the browser interface and the Excel interface. You can add, update, and delete values; view cell notes, formulas, and splits; and use the Cell Explorer, all from within Excel.

You can also work offline, then log back in and upload your work to the server.

All permissions and privacy settings are applied, so users in Excel interface will have the same access to data as in the browser interface.

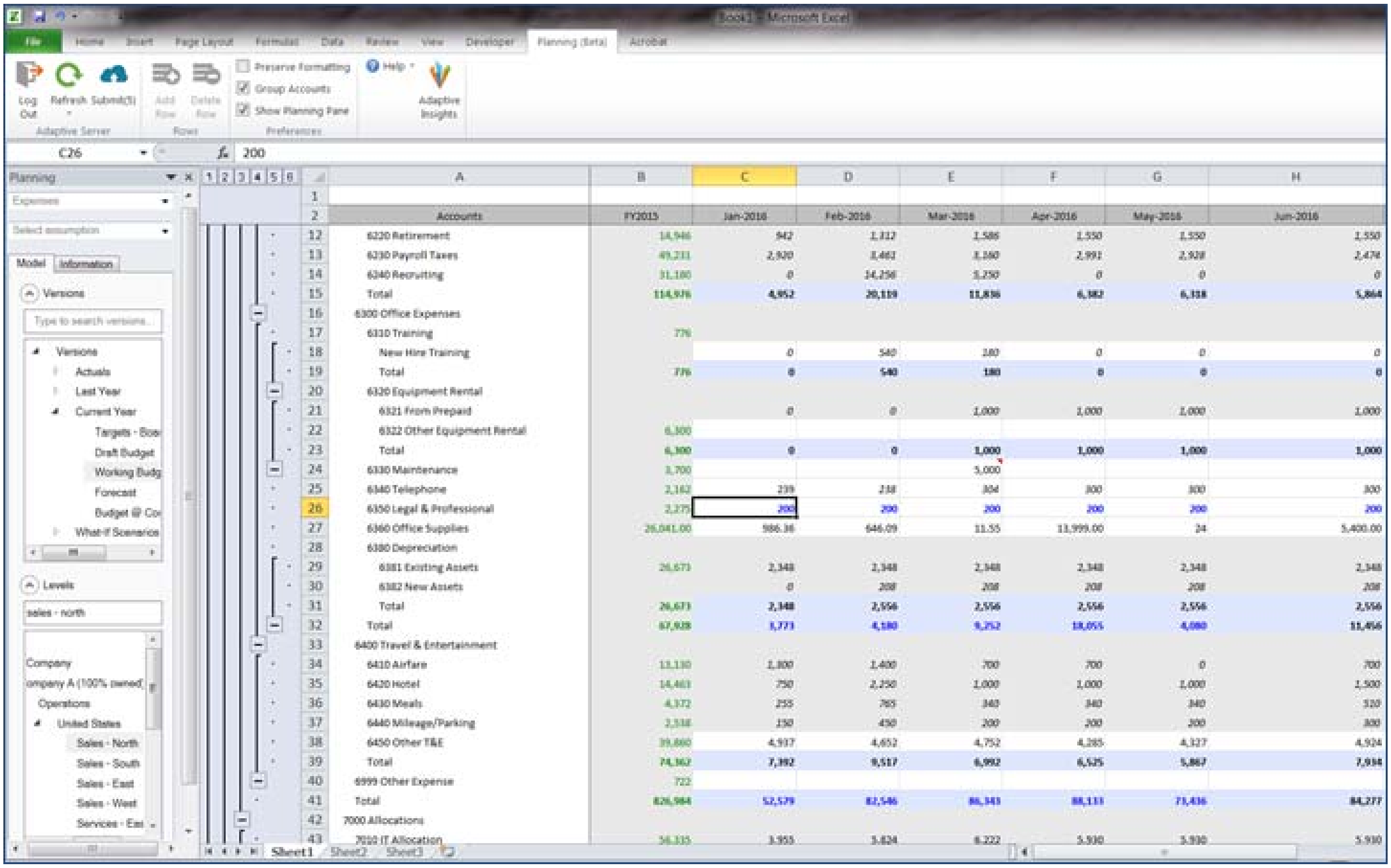

Figure 13: A Planning sheet opened in Excel through the Excel Interface for Planning.

Adaptive Discovery

The features for Adaptive Discovery in the 2016.2 release are as follows.

Attributes in Discovery

Level attributes and dimension attributes can now be used in Adaptive Discovery the same way dimensions are used. Users can filter, group, and expand by these attribute types, as well as using them in context settings.

Circular Gauge and Circular Meter Editors

The Circular Gauge and Circular Meter editors have been expanded to provide increased control over circular gauge and circular meter formatting, like changing gauge layout, style, scale, labels, zones and so on.

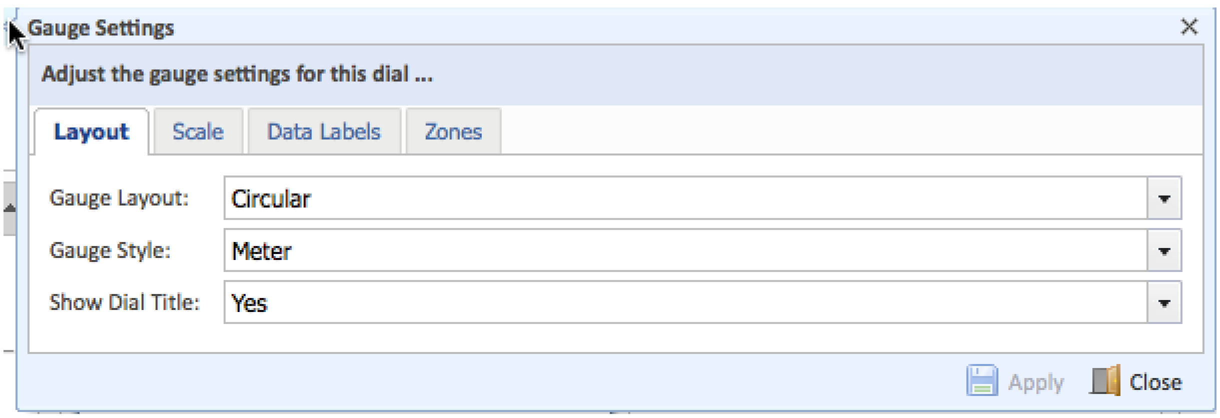

Figure 14: The new Circular Gauge Settings editor.

Printer-Friendly Dashboard Snapshot Export

In the past, using the snapshot feature in Discovery printed one dial per page rather than grouping the dials the way they appear on the dashboard in the application. With the introduction of this feature, when you run a snapshot, the default behavior is to group the dials similar to how they appear on the dashboard. You can check **Show one dial per page** if you prefer that presentation. Existing scheduled snapshots are not affected, and you can switch them to the dashboard layout by unchecking **Show one dial per page.**

Customer Support Roles and Permissions

Administrators can now give Adaptive Support staff access to Discovery without having to make them a member of that Discovery tenant.

To give Adaptive Support access, do the following:

1. In Discovery, click Options .
2. Select **Discovery Settings**.
3. Check **Enable Support Access** in the Discovery Settings dialog.
4. Click **Apply**.

Discovery Enterprise Windows Mobile App

The Discovery app for Discovery Enterprise is now available for Windows phones.

SAML for Discovery iPhone App

The Discovery iOS app for Discovery Enterprise now supports 2-factor authentication. This makes the iOS app more secure.

Adaptive OfficeConnect

The feature for Adaptive OfficeConnect in the 2016.2 release is as follows.

Cell Explorer for OfficeConnect

You can now open the Cell Explorer from inside OfficeConnect! This lets you drill into Adaptive sheets from within the OfficeConnect interface.

To open the Cell Explorer, click the cell you want to drill into, then click Explore Cell in the OfficeConnect ribbon. The Cell Explorer opens in a browser window, as shown in Figure 15.

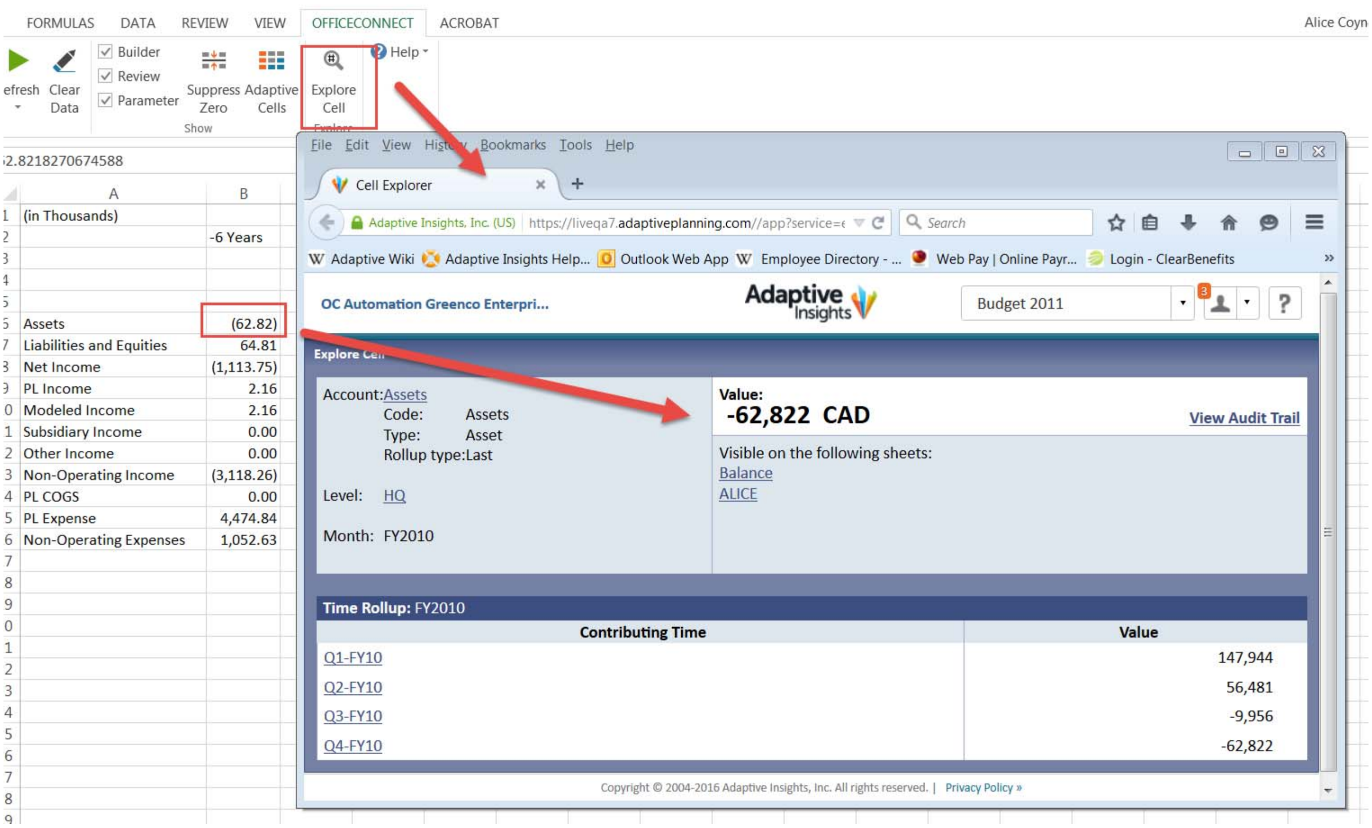

Figure 15: The Cell Explorer, opened from inside OfficeConnect.

Known Issue

For users outside the United States, incorrect numbers can result when editing sparklines

For users that use a regional/language setting other than the United States-English setting, editing values on a sparkline can potentially lead to incorrect numbers. This can occur when the thousands separator and decimal point for the regional setting are different from the Unites State-English setting.