


Adaptive Planning

Fall 2012 Release

New Features and Enhancements

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Adaptive Planning Fall 2012 Release Notes

The Adaptive Planning Fall 2012 Release debuted on September 21, 2012. It includes enhancements to Workflow, Accounts, Discovery, Excel and PDF report printing, and the addition of new capabilities: you can now rename your fiscal year, choose what sorts of email updates you want the application to send you, and add your company's logo to the application. Also, once you have logged in to the Adaptive Planning Support and Knowledge Base. from Adaptive Planning, you will be able to seamlessly go from Adaptive Planning to support without having to log in again, even in future sessions.

This release also includes a significant terminology change: we are renaming the Plan Tree to "Organization Structure". This change adds clarity with more readily-understandable terminology throughout the system.

Following is a table showing the new terminology:

Current Terminology	New Terminology
Plan Tree / Plan Structure	Organization Structure
Plan/Sub-plan	Level/Sub-level
Plan Dimension	Organization Dimension
Plan Selector (upper-right corner of Sheets)	View Selector
Plan-Independent Sheet	User-Assigned Sheet
Corporate Plan	Top Level
Plan Admin	Organization Structure Admin

We will continue to use the term "plan" when referring to data in plan versions (budgets, forecasts, etc.) as opposed to data in the Actuals version.

Account Attributes

Account attributes give administrators the ability to tag or classify accounts, much like dimensions may be used to tag or classify levels. Attributes can be used to tag accounts for intercompany elimination and to quickly build reports that contain accounts of a certain type, such as for reporting such as GAAP versus IFRS.

Attributes and their values (for example, the attribute “Part of pre-production” could have the values “yes” and “no”) are defined on the Define Attributes page, using a process almost identical to the one used for defining dimensions and their values.

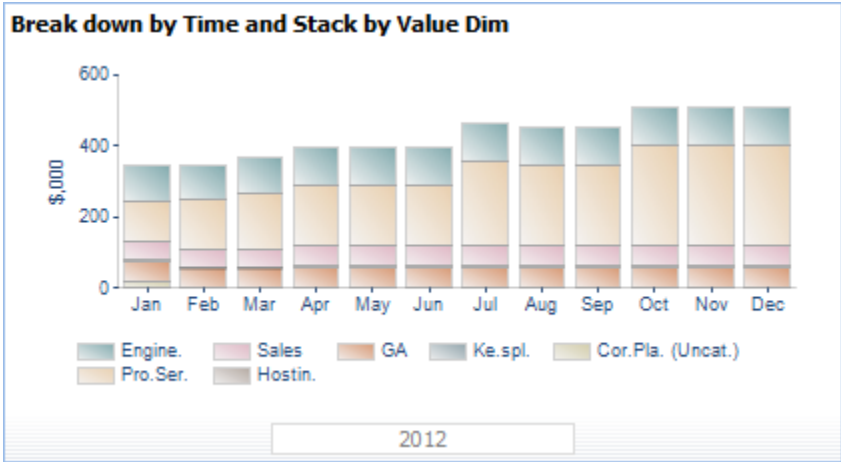
The screenshot shows the 'Define Attributes' web interface. At the top, there is a search bar and a link for 'Import Attribute Structure'. Below the search bar is a list of attributes, with 'New Attribute' selected. To the right of the list is a 'Attribute Details' panel containing a 'Name' field with 'New Attribute' entered, and two checkboxes: 'Account import automatically creates attribute values' and 'Keep sorted'. At the bottom of the interface are buttons for 'New Attribute', 'New Value', 'Delete', 'Move Up', 'Move Down', 'Done', and 'Printable View'.

Discovery Enhancements

Many of the enhancements for Discovery are behind the scenes, and largely invisible except in the smoother running of the module. The others include new dial capabilities and the ability for administrative users to edit time structures:

New Dial Capabilities

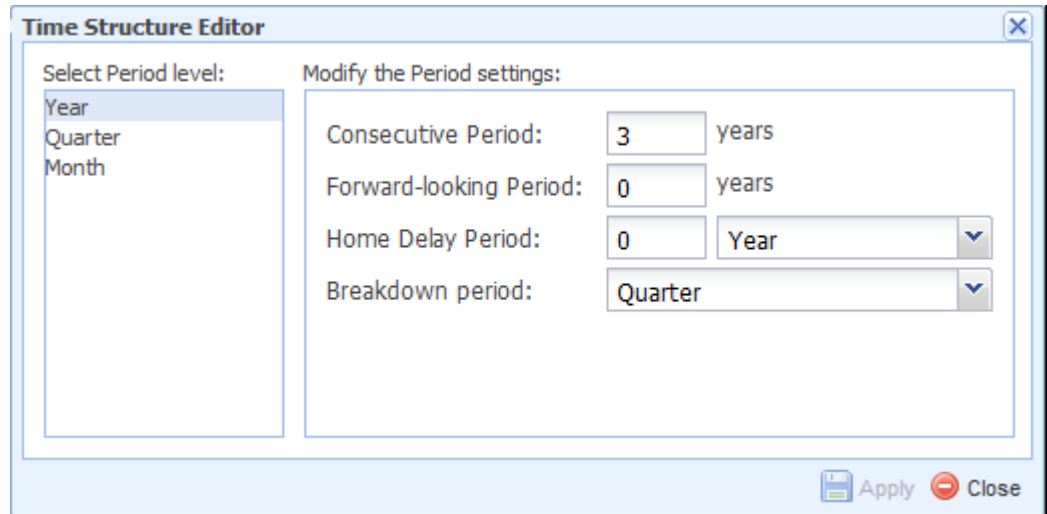
Waterfall and stacked charts are now available! See the Discovery User Guide's walkthrough section for a look at how to implement these analysis views.



Specify Breakdown Periods and Other Time Structure Settings

Administrators can now edit the time structures used in Discovery, changing the number of years, quarters, and months displayed in "consecutive base

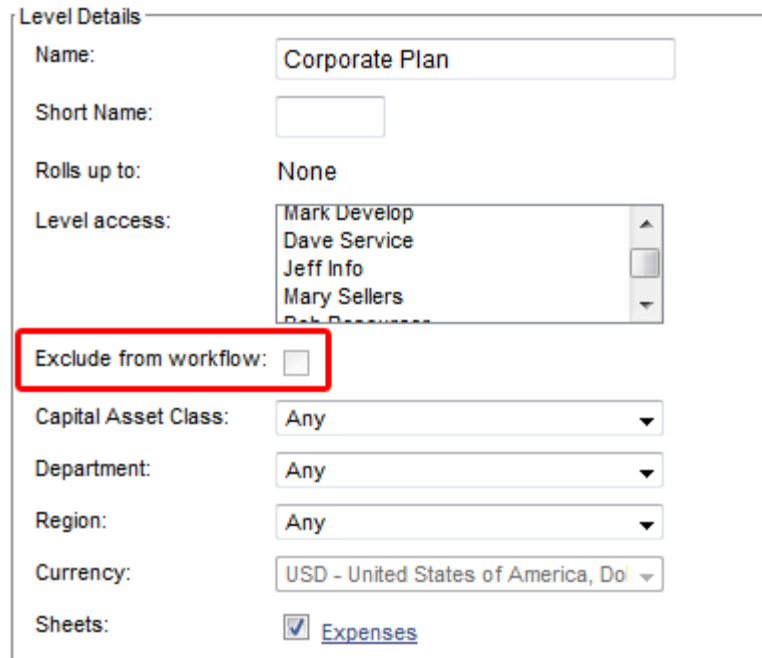
period” and “consecutive breakdown period” dials. See the Discovery User Guide for more.



Workflow Enhancements

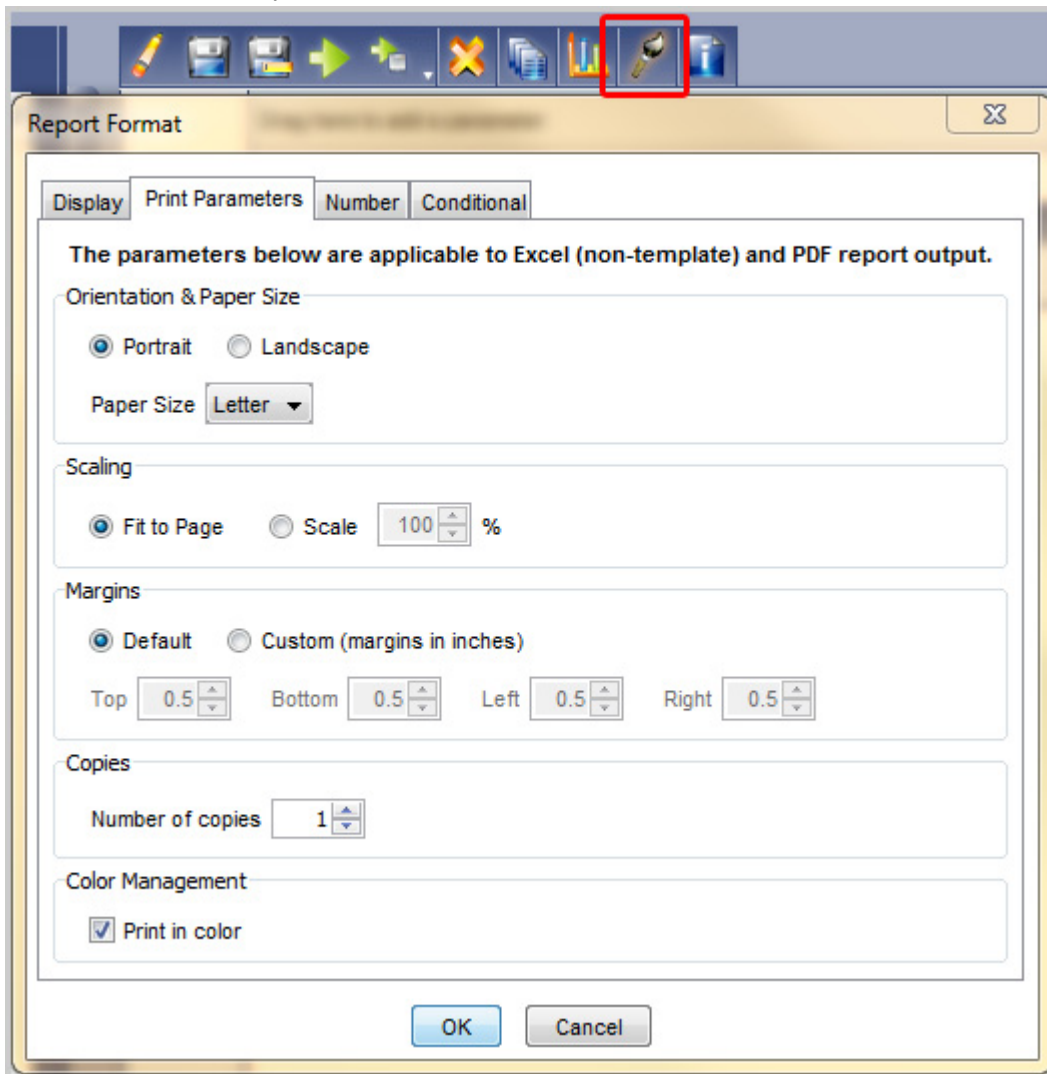
Users with the “Approve Levels” permission can now approve levels and the sub-levels of any level they have access to, except for those levels excluded from workflow or locked.

Levels can be excluded from workflow on the Manage Organization Structure admin screen, using the Exclude from Workflow checkbox.



Excel and PDF Report Print Parameters

The report builder now allows print parameters to be set for non-template Excel and PDF reports. To set a report's print parameters, click the Report Format button in the report builder, then click the Print Parameters tab.



User Email Management

Users now have the ability to manage the types of communication they receive from Adaptive Planning. Users can even choose not to receive any email at all. Users involved in workflow cannot opt out of email entirely (this

would stop them getting important updates about workflow status changes), but can opt out of everything but system alerts and updates.

Please check the types of email communication you would like to receive from Adaptive Planning.

System Alerts & Updates	<input checked="" type="checkbox"/>	Customer Newsletter	<input type="checkbox"/>
Education & Training	<input type="checkbox"/>	Customer Webinars	<input type="checkbox"/>
Local Events	<input type="checkbox"/>	New Products and Enhancements	<input type="checkbox"/>
Partner Newsletter	<input type="checkbox"/>	Partner Webinars	<input type="checkbox"/>
User Groups	<input type="checkbox"/>	Surveys	<input type="checkbox"/>

I do not wish to receive email communications from Adaptive Planning

Company Logo

Administrators can now upload a graphic of their company logo to be displayed in the application and in printed reports or drill trees. To upload a graphic, go to Administration > Visual Preferences and follow the on-screen prompts.

Visual Preferences

Customer Logo

No customer logo

Import file:

Current logo: None

Fiscal Year Naming

Administrators can now choose whether the fiscal year should be named after the beginning or the end of the year. To change how your fiscal year is named, contact Adaptive Planning Support.

