

# Adaptive Planning



## Spring 2012 Release

New Features Overview and Training  
Andrea Smith, Support and Training Manager

# Overview of Session

- Hosted Upgrade Process and Timeline
- New Features Overview and Demonstration
- Questions
  - Please use the chat feature in WebEx to ask questions
  - Chat questions as you think of them and I'll answer them at different points in the session



# Hosted Upgrade Process and Timeline

- System will be upgraded on Friday evening/early Saturday morning.
  - **Friday, May 11th**, 7:00 PM PT (Saturday, May 12 at 03:00 GMT/UTC) to **Saturday, May 12th**, 5:00 AM PT (Saturday, May 12<sup>th</sup> at 13:00 GMT/UT).
  - The system will immediately become available once the upgrade is complete.
- During this time all hosted clients will be upgraded to the new version with the new features



# New Features

- Discovery (add-on feature)
- Freeze Report Column and Row Headers
- Suppress Zero Rows in Standard and Cube Sheets
- Self-service Password Reset
- Turn off Expand/Collapse on Reports
- Multi-Tier Y-Axis Cubes
- Partial Modeled Data Import
- Single Sign-on for Salesforce and NetSuite
- Other Changes to Note

# Discovery Terminology

- **Discovery** – a visual discovery application within Adaptive Planning that provides personalized business intelligence so that all business users across your company can easily access and analyze data to make better decisions more quickly.
- Discovery Components
  - **Perspective** – a group of **dashboards**, usually focused on a common function like finance or sales.
  - Dashboards contain **ribbons**, which contain one or more dials
  - **Dials** – give you a quick look at your data, can be created in a range of styles (including gauges, bar charts, pie charts, and tables), and can combine information from multiple accounts and dimensions.

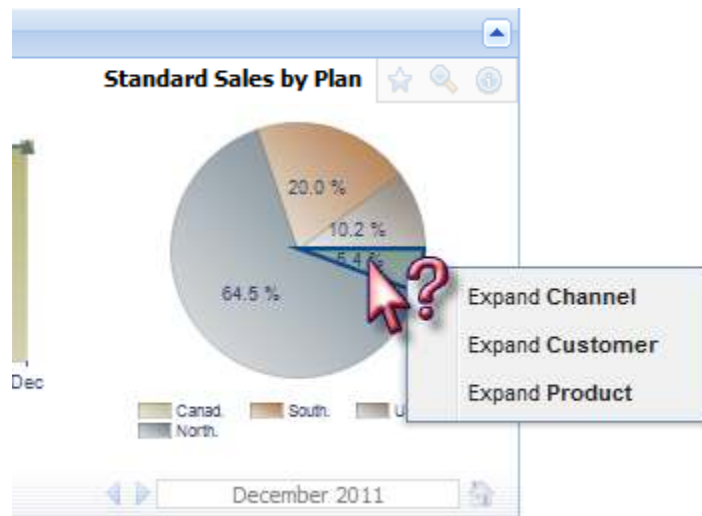
# What is Discovery?

- Highly visual graphics designed to aid in quick understanding



# What is Discovery

- High level of interactivity, via drill-down, filters, and ability to alter the time period and level of all information



## Adaptive Planning

Discovery | Workflow | Sheets | Formulas | Import | Export | Reports

**Finance Perspective**

**Plan:** Total Company  
**Version:** 2012 Working Budget  
**Period:** December 2011 (3rd Quarter, 2011)

**Standard Sales Summary**

**Standard Sales Statistics**

Measure	Dec 2011			2011
	Actual	Zone	Trend	Actual
Standard Sales Units	1,024 U			12,279 U
Standard Sales Revenue	\$135,049			\$1,619,061
Standard Sales COGS	\$86,340			\$1,031,542
Standard Sales GM	\$48,709			587518.55

# What is Discovery?

- Hierarchical drill tree shows both the original information and the path taken, and contextual breadcrumbs ensure that users always know where they are and where they came from

Drill Trees



**Finance Perspective**

**Plan:** Total Company ▾ Operations ▾ Domestic ▾ Northwest ▾ Northwest Sales

**Version:** 2012 Working Budget ▾

**Period:** December 2011 ▾ 4th Quarter, 2011

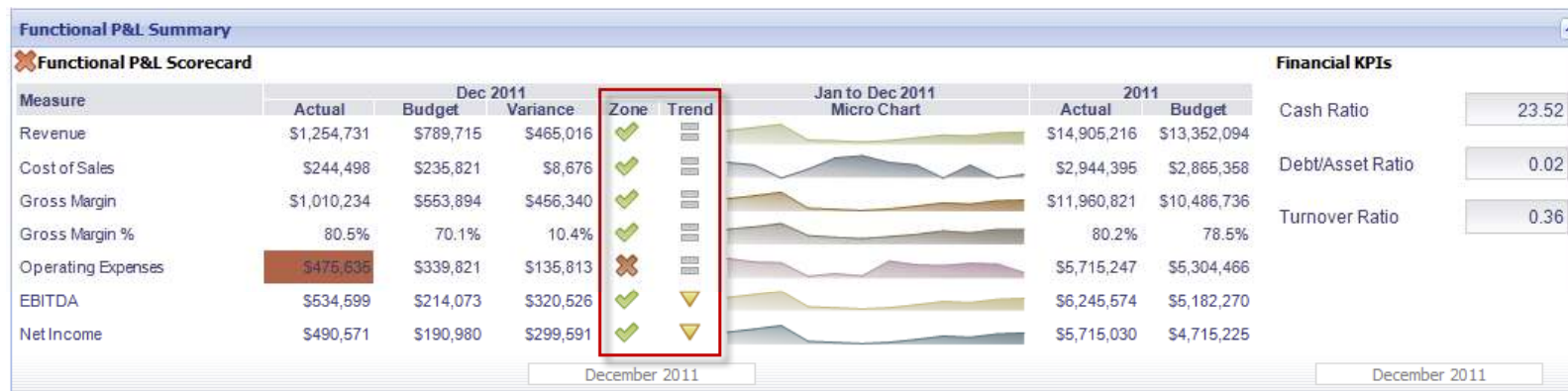
▾ Sep | Oct | Nov | Dec

Breadcrumbs in  
Context Pane



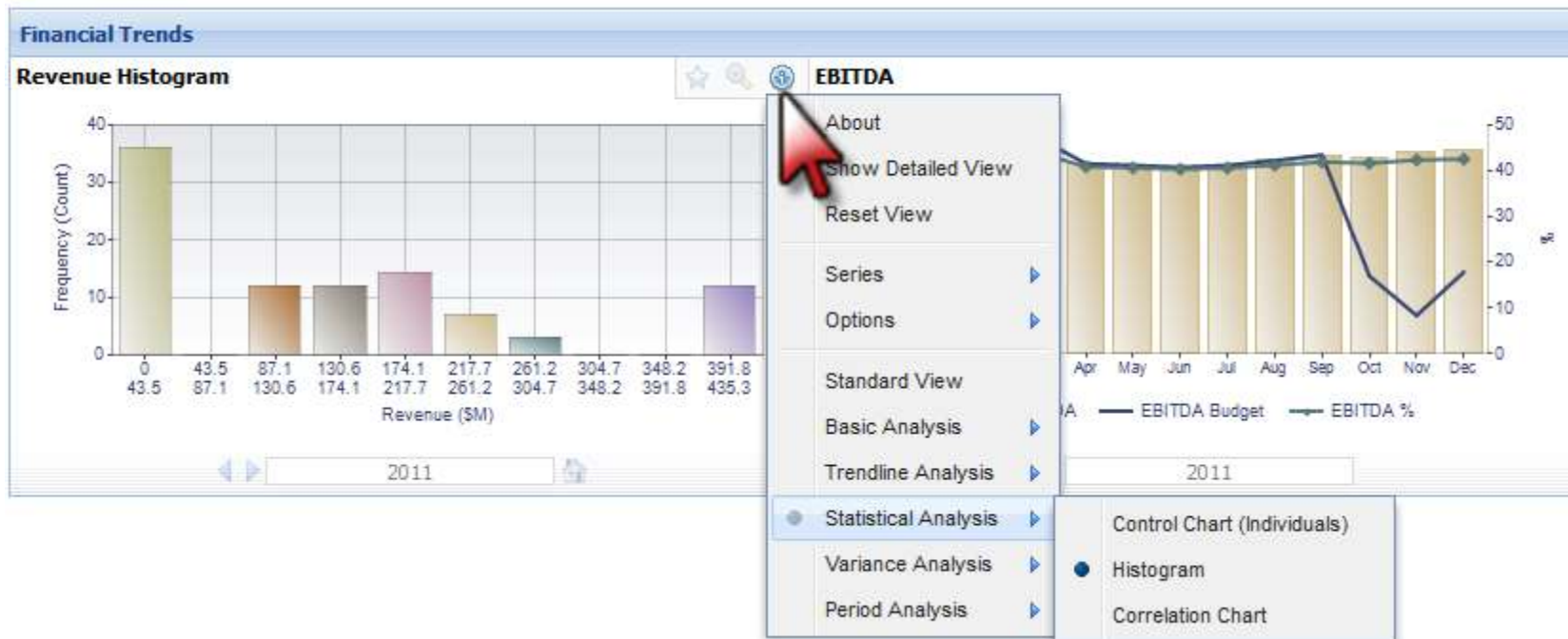
# What is Discovery?

- Color-coded alerts to zoom in on data that needs to be noticed



# What is Discovery?

- Sophisticated but easy-to-use analytics to quickly understand what is happening and how to improve results



# Freeze Report Column and Row Headers

- Available for Matrix, Modeled, Transaction, and Snapshot reports in an HTML format
- Freeze and Unfreeze Headers in the Report Builder and the Viewer
- When you change the freeze state, it is saved as an attribute of the report

The screenshot shows the 'Report Properties' dialog box with the 'Display' tab selected. The 'Freeze row and column headers (HTML reports only)' checkbox is checked. In the background, a report viewer displays a table for '1100-SALES (Rollup)'. A tooltip 'Unfreeze Headers' is visible over the column headers.

1100-SALES (Rollup)					1400-ADMIN (Rollup)			
Q1-FY11	Q2-FY11	Q3-FY11	Q4-FY11	2011	Q1-FY11	Q2-FY11	Q3-FY11	Q4
Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Ac
220,647.50	3,220,647.50	3,220,647.50	3,220,647.50	12,882,590.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

# Suppress Zero Rows in Standard and Cube Sheets

- Available in both Standard and Cube sheets
- Setting is available both in the sheet builders and in the sheet viewers.
- New account setting to specify if an account should be suppressed when this option is turned on

The screenshot illustrates the configuration process for suppressing zero rows. It features three overlapping windows:

- Show and Hide Dialog:** A dialog box with a 'Columns' tab. It shows settings for 'FY2011' and 'FY2012', each with checkboxes for 'Months', 'Qtrs', and 'Years'. A checkbox labeled 'Suppress rows if all zeros or blank' is highlighted with a green circle.
- Summary of Expenses Table:** A table with two columns: 'Action' and 'Summary'. The 'Action' column contains 'Edit' links. The 'Summary' column lists 'Account Groups: New Group', 'Dimensions:', 'Display Options:', 'Available On:', and 'Customization f'. The 'Display Options:' row is highlighted with a green circle.
- Account Settings Dialog:** A dialog box for 'Actuals' and 'Suppress' settings. The 'Suppress' section has two radio button options: 'Account may be suppressed when zero or blank' (selected) and 'Account will not be suppressed even when zero or blank'. This section is highlighted with a green circle.

# Self-service Password Reset

- Users can reset their passwords themselves
  - Saves time for your users and for Administrators
  - Option can be turned off by Administrator in the Password Management section of the General Setup screen
- Users can request a link to reset the password sent to the email address specified for the account
- If you have SSO configured with another application, your users will not be able to reset the password through Adaptive Planning

# Self-service Password Reset



## Adaptive Planning Password Reset

no-reply@adaptiveplanning.com

Sent: Mon 5/7/2012 11:30 PM

To: Andrea Smith

Someone has requested a new Adaptive Planning password for Dave Service at Adaptive Planning Training Instance. If you did not make this request, there is no need to take any action. Your existing password will not be changed.

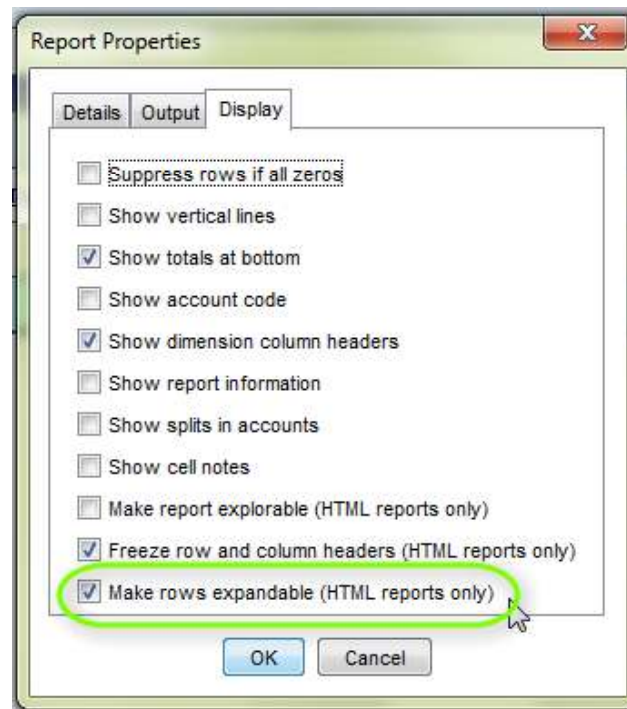
To set your new password, click the link below. This link will expire after 30 minutes.

<https://liveexec.adaptiveplanning.com/app?params=QkYyNzY2NjdFNTcxNjg4NkUwNDBFMTBBMEUxMTFERTEsQVBUUkFJTiwLDEzMzY0NTEzODM5ODg%3D&service=resetPassword>

We are unable to respond to messages sent to this email address. Please do not reply. For support, please email [support@adaptiveplanning.com](mailto:support@adaptiveplanning.com).

# Turn off Expand/Collapse on Reports

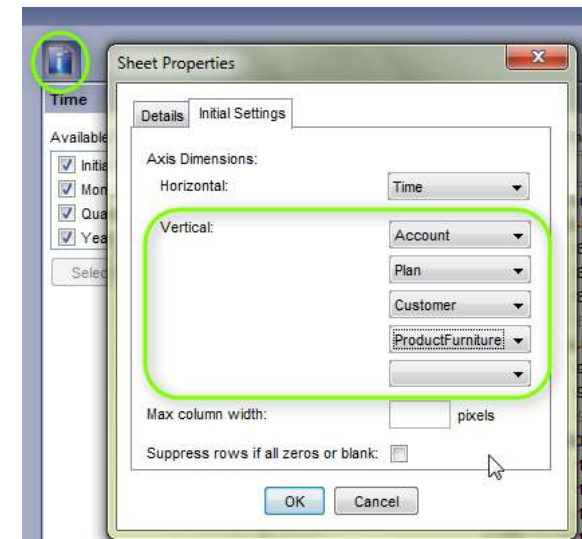
- A new report property available only in Matrix Reports
- Intended to improve performance in reports where only aggregate elements are displayed





# Multi-Tier Y-Axis Cubes

- Cube Sheet Administrator can select up to five dimensions on the Y-axis of the cube sheet.
- When viewing a cube sheet with more than one dimension on its Y-axis:
  - A viewer can replace any dimension on an axis, even one of the multiple dimensions on the Y axis, by dragging a pinned dimension from the selectors on top of an element of that dimension.
  - The "Change Dimensions" dialog shows as many selectors for Y-axis as there are dimensions currently appearing on the axis, and they can be changed to any valid dimension.





# Partial Modeled Data Import

- Introduces the option to append the imported data
- Prior to this release, the data was erased and replaced with the data on the import template
- No longer have to use a printable view to extract and then add to existing data.

**Import Into Sheet**

Standard

Sales

**Import Mode**

Add the imported rows to the sheet

Replace all data in the sheet

**Select File**

Import File:   [Download Template](#)

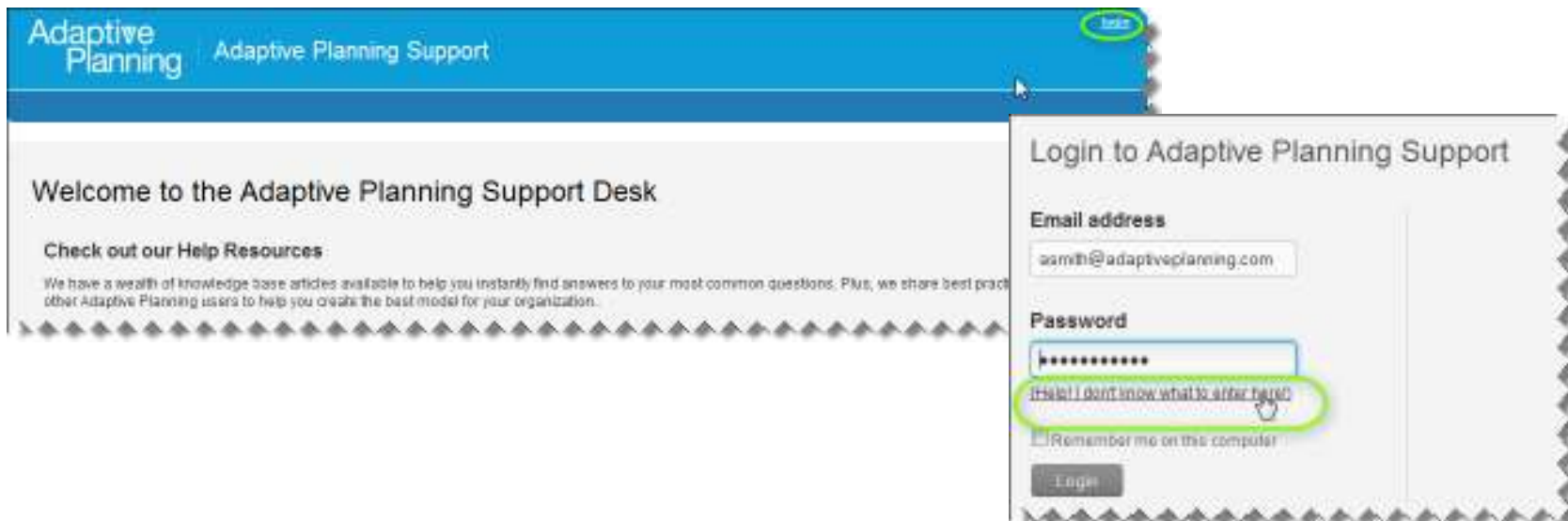
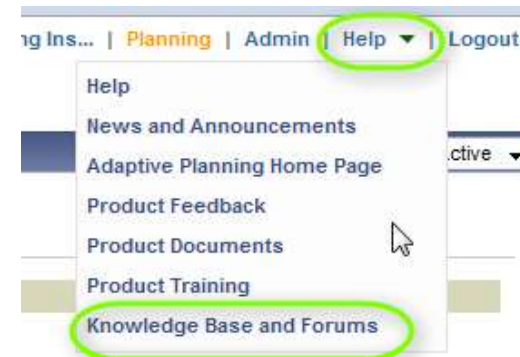
# Single Sign-on for Salesforce and NetSuite

- Introduced technology in this release
- In the next few months NetSuite will roll out a SuiteBundle for Adaptive Planning and Salesforce.com will introduce an Adaptive Planning App on AppExchange



# New Knowledge Base

- Phased out Collaboration/Community – links removed
- New option in the Help menu
- Separate login/password required



# Questions & Answers

