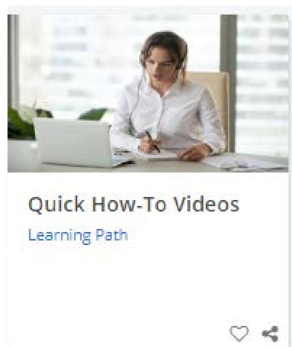
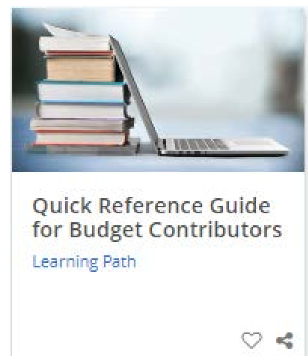
Training Resources For Your Journey

The Adaptive Insights Customer Training Center delivers content that covers our entire product solution. The self-paced learning paths and courses listed below are available to all customers who have purchased training, at no additional cost. The content includes demonstration videos, a hands-on exercise guide and access to a personal training environment for 30 days.

There are multiple Learning paths and a robust course library with short courses, how-to videos and quick reference guides:





Click HERE to go the Training Center. Log in using the credentials you received in your ‘Welcome to the Training Center’ email.

NOTE: Your login for the Training Center is different than your Adaptive Insights product login.

Ask The Experts

If you are enrolled in any of our courses, you have access to our regularly scheduled Q&A sessions. Subject matter experts are available to answer any questions you may have as you work through the course materials. Check the News section on the Training Center homepage for the schedule.

Questions or Assistance

For questions about your training experience click HERE to reach our Training Department.

Learning Paths For Finance Users

Getting Started: Introduction to Modeling - required for all users

Prerequisite: None

Estimated time for completion: 4-5 hours

Objectives:

This course emphasizes key strategies, decision points and best practices to help you design and build an optimal foundation.

Key topics:

1. Foundational Elements
2. Sheet Types
3. Reports

Operational Modeling Basics

Prerequisite: Introduction to Modeling

Estimated time for completion: 10-12 hours

Objectives:

In this series of courses, you will build a model from scratch, including the foundational elements, basic standard, modeled and cube sheets, and basic formulas.

Key topics:

1. Building the Foundational Elements
2. Creating Standard Sheets and Basic Formulas
3. Creating Modeled and Cube Sheets

Flexible, Just-in-Time Reporting

Prerequisite: Introduction to Modeling

Estimated time for completion: 4 hours

Objectives:

In this course you will learn how to quickly design, format, and publish personalized ad hoc and management reports.

Key topics:

1. Dimensionality in Reporting
2. Comparison Reporting
3. Viewing Reports

OfficeConnect: Telling the Story Behind the Numbers
Prerequisite: Introduction to Modeling
Estimated time for completion: 5 hours
Objectives: In this course you will learn how to set up, format, and refresh your data connection with the Microsoft Office Suite.
Key topics: 1. Reporting Pane 2. Time and Version Elements 3. Managing Workbooks and Filters

Using Analytics to Monitor Your Performance at a Glance
Prerequisite: Introduction to Modeling
Estimated time for completion: 4 hours
Objectives: This course covers the functionality to quickly create dials and dashboards to visualize your company's performance.
Key topics: 1. Creating Perspectives and Dashboards 2. Creating Charts 3. Interacting and Sharing Charts

Consolidation – required for Admin users using Consolidations
Prerequisite: Introduction to Modeling
Estimated time for completion: 2 hours
Objectives: In this course uses a series of examples to show users how to improve accuracy, collaborate more effectively and deploy models while complying with US GAAP or IFRS reporting standards.
Key topics: 1. Assigning Trading Partners and Elimination Levels 2. Assigning Intercompany Accounts 3. Creating Journal Entries

Excel Interface for Planning (EIP)

Prerequisite: None

Estimated time for completion: 1 hour

Objectives:
In this course uses a series of examples to show users how to work with the Excel Interface for Planning.

Key topics:

1. Accessing Adaptive Planning Sheets in Excel
2. Entering Data and Submitting Updates

Managing Multiple Instances – required for users with multiple, connected instances

Prerequisite: Introduction to Modeling

Estimated time for completion: 2 hours

Objectives:
In this course uses a series of examples to show users the required steps to connect and manage multiple instances.

Key topics:

1. Creating Linked Levels
2. Mapping Accounts and Dimensions
3. Refreshing Data

Using the Integration Framework to Take Control of Your Data – recommended for users who will manage the importing, mapping, and loading of data from outside sources to their Adaptive Insights model.

Prerequisite: None

Estimated time for completion: 4 hours

Objectives:
In these self-paced courses, you will learn how to automate data flows from external sources and accelerate your month- and quarter-end reporting.

Key topics:

1. Integration Framework Fundamentals
2. Integration Framework: On-Premise and Scripted Sources

Learning Paths For Sales Planning Users

Adaptive Insights for Sales, built on the business planning cloud, is a planning and analytics solution for agile sales teams that helps reduce attrition, improve yields and achieve better, more predictable performance.

Introduction to Sales Planning – recommended for new Admin users and those who would like to review how a simple sales model could be built.
Prerequisite: None
Estimated time for completion: 4 hours
Objectives: This course introduces you to the features and functionality in Adaptive Insights for Sales to help you quickly and easily plan and optimize resources and determine pipeline coverage, territory modeling and market segmentation.
Key topics: 1. Foundational Elements 2. Sheets 3. Charts 4. Importing Data

Using Analytics to Maximize Sales Performance and Predictability – recommended for those users who will be designing and sharing charts.
Prerequisite: None
Estimated time for completion: 4 hours
Objectives: Adaptive Discovery puts the power of self-service interactive dashboards, visualizations and charts into your hands. Various charts are available to help you monitor and adjust your sales organization’s data and metrics.
Key topics: 1. Creating Perspectives and Dashboards 2. Designing Charts 3. Interacting and Sharing Charts

Using the Integration Framework to Take Control of Your Data – recommended for users who will manage the importing, mapping, and loading of data from outside sources to their Adaptive Insights model.
Prerequisite: None
Estimated time for completion: 4 hours
Objectives: In these self-paced courses, you will learn how to automate data flows from external sources and accelerate your month- and quarter-end reporting.
Key topics: 1. Integration Framework Fundamentals 2. Integration Framework: On-Premise and Scripted Sources

COURSE LIBRARY CONTENT

OfficeConnect: The Path to Faster Board Reports - recommended for users interested in linking tables, charts and narratives from OfficeConnect for Excel to OfficeConnect for PowerPoint and OfficeConnect for Word.
Prerequisite: OfficeConnect: Telling the Story Behind the Numbers
Estimated time for completion: 2 hours
Objectives: Use OfficeConnect reports and charts to build a story that clearly shows current performance, future trends, and possible scenarios.
Key topics: 1. Using Charts and Reports to Build a Story of Performance and Trends 2. Generate Reports in Less Time 3. Eliminate Manual Processes and Focus on Analyzing the Data

Single Sign-on (SSO)
Prerequisite: None
Estimated time for completion: 30 minutes
Objectives: In this course you learn how to enable single sign-on for enhanced security and ease to log into Adaptive Insights.
Key topics: 1. SSO Overview and setup

Integration Framework: Custom Cloud Sources– required for users whose data resides in an on-premise system
Prerequisite: Framework Fundamentals, JavaScript/equivalent developmentexperience
Estimated time for completion: 4 hours
Objectives: Build an interface and import it into cloud-based staging tables. Implement the four CCDS functions while learning the key API calls needed to make a simple data source fully functional.
Key topics: 1. Workflow and Scripting API 2. CCDS Functions and Parameters

Integration Framework and NetSuite– required for users working with the NetSuite adapter in the Integration Framework
Prerequisite: Integration Framework Fundamentals
Estimated time for completion: 2 hours
Objectives: Learn to connect to a NetSuite application using the NetSuite adapter; work with NetSuite tables and columns; import data from saved searches in NetSuite; and configure drill-through to NetSuite.
Key topics: 1. Connecting to NetSuite 2. Staging Area Structure 3. Drill Through to NetSuite

Integration Framework and MS Dynamics GP– required for users working with the MS Dynamics GP adapter in the Integration Framework
Prerequisite: Integration Framework Fundamentals
Estimated time for completion: 2 hours
Objectives: Learn to connect to a MS Dynamics GP application using the MS Dynamics GP adapter, work with MS Dynamics GP tables and columns, and import data from MS Dynamics GP.
Key topics: 1. Connecting to MS Dynamics GP 2. Working with Tables and Columns 3. Importing Data from a MS Dynamics GP Application

Integration Framework and Sage Intacct– required for users working with the Sage Intacct adapter in the Integration Framework
Prerequisite: Integration Framework Fundamentals
Estimated time for completion: 2 hours
Objectives: Learn to connect to a Sage Intacct application using the Intacct adapter, work with Intacct tables and columns, and import data from a Sage Intacct application.
Key topics: 1. Connecting to Sage Intacct 2. Working with Intacct Tables and Columns 3. Importing Data from a Sage Intacct Application

Update and Improve Your Model for the Next Planning Cycle

Prerequisite: None

Estimated time for completion: 4 hours

Objectives:

In this course you will learn tips and tricks and best practices when creating a new plan version.

Key topics:

1. Creating New Plan Versions
2. Editing Your Structure
3. Populating Assumptions and Sheets that Drive Plan Formulas
4. Managing Virtual Versions
5. Adding New Users and Roles

Transactions

Prerequisite: None

Estimated time for completion: 30 minutes

Objectives:

In this course you will learn how to leverage transactions to gather stronger insights into the actuals balances.

Key topics:

1. Transaction Overview
2. Transactions Setup
3. Transactions Display within Sheets and Reports

Workflow and Process Tracker – Additional Information

Prerequisite: None

Estimated time for completion: 30 minutes

Objectives:

In this course you will learn how to leverage Workflow and Process Tracker to create a consistent practice for the creation of new budgets and forecasts.

Key topics:

1. Workflow Setup
2. Submission and Approval of Levels Using Workflow
3. Creation and Submission of Processes and Tasks