

## DATA INTEGRATION OPTIONS

Adaptive Planning provides a full range of integration options for general ledgers and other enterprise applications, such as ERP, CRM, and HR systems, located both on-premise and in the cloud.

### Integration with Other Systems

Effective planning and reporting – including annual budgeting, rolling forecasts, variance analysis, and what-if scenarios – requires tight integration with multiple systems. These typically include the General Ledger (GL), Customer Relationship Management (CRM) application, Human Resource system and other elements of the Enterprise Resource Planning (ERP) system, or a centralized data warehouse.

### Adaptive Planning Data Integration

Adaptive Planning has several options for integrating with other enterprise systems, located either on-premise or in the cloud.

#### Flat File

Standard Adaptive Planning functionality includes the ability to import data via Excel files, and export data to Excel or flat files.

#### Adaptive Planning Connector for On-Premise Applications

Adaptive Planning Connectors enable automated data import and export between Adaptive Planning and other enterprise systems. Connectors are available for the most common source systems and databases, and may be deployed at any time during or after implementation.

#### Adaptive Planning Hosted Connector for Cloud-Based Applications

Adaptive Planning's Hosted Connector is a cloud-based integration platform that allows companies to quickly and easily integrate Adaptive Planning with other cloud-based systems, such as Salesforce.com, Intacct, FinancialForce.com, NetSuite OpenAir, Plex Systems, Workday, and others.

#### NetSuite Connector

Adaptive Planning and NetSuite have together developed custom, best-in-class data integration. The NetSuite Connector features a simple set-up that can be completed in minutes; supports bi-directional export and import between the applications; and allows users with the appropriate permission to drill down from Adaptive Planning into the underlying transactions within NetSuite.

#### Web Services APIs

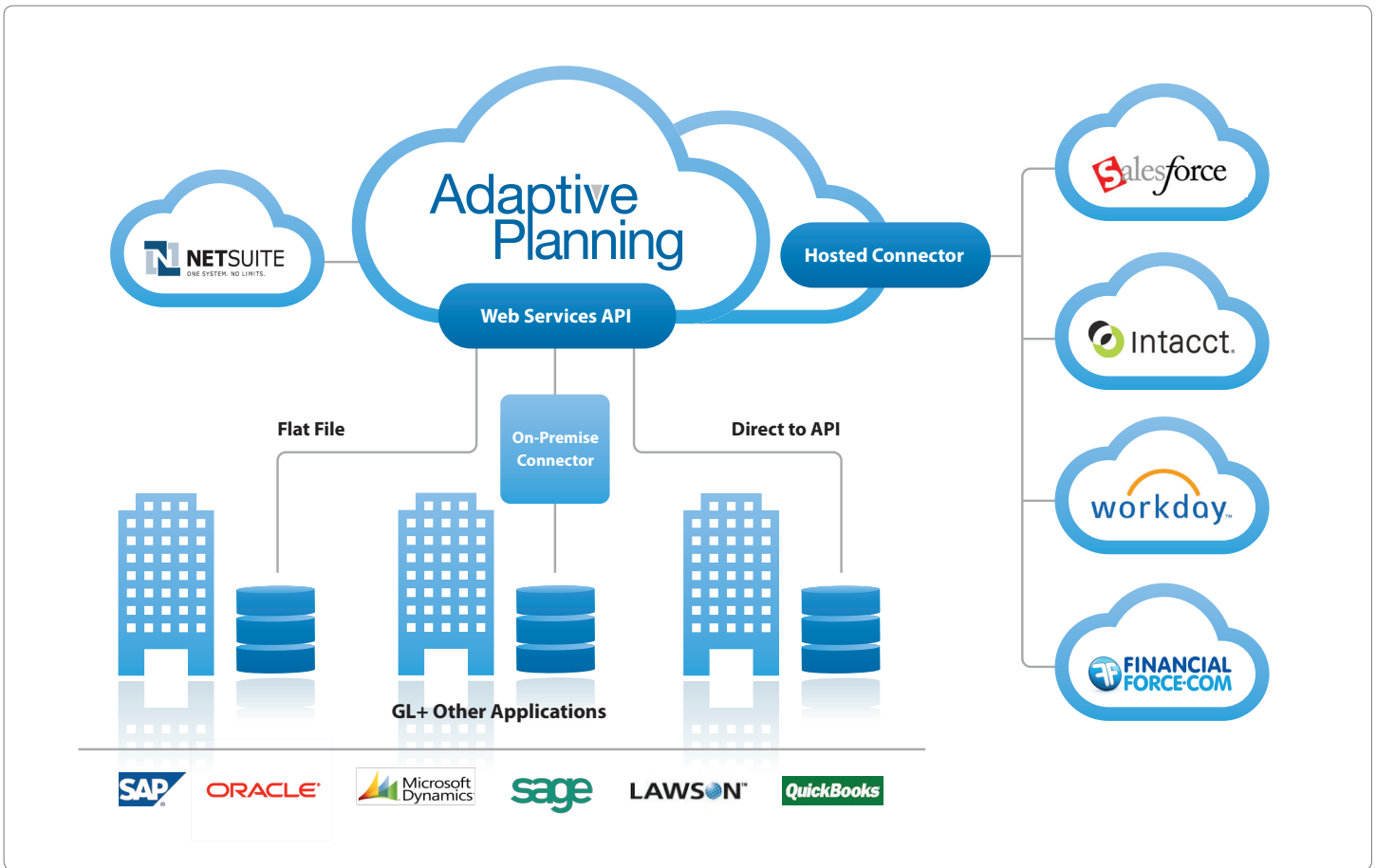
Adaptive Planning APIs (application program interfaces) can be used to develop custom integrations with on-premise and cloud-based applications.

**“By selecting and deploying these two complimentary applications, we were able to link our strategic plans to our budget in Adaptive Planning and to our transactional accounting in Netsuite – all with a common nomenclature, structure, and accounts. This has also enabled us to increase cross-organizational communication and collaboration.”**

– James Jones, Director, Financial Planning and Analysis, KANA

**“Adaptive Planning is quickly becoming the most important data source for financial and operational information in our company.”**

– Bas Brukx, Vice President, Financial Planning and Analysis, Vocus



Adaptive Planning Data Integration

## How It Works

The process for importing data via Excel is a simple matter of extracting data from a back end system (GL, HR, CRM, etc.), formatting it to map data fields to corresponding data fields in Adaptive Planning, then using the standard import functionality. Data can also be exported to a flat file.

Data integration with these same systems can be automated via the Connectors described above. The process of automatic data integration falls into three main steps:

**Extract:** Automated data integration begins with extraction of data from the source system. This step extracts raw data from GL or other database tables, and transforms it into the equivalent of a trial balance report, listing accounts and amounts for the specified time period.

**Transform:** Once the trial balance report is obtained, the next step is to separate the account codes into the pieces used by Adaptive Planning. This step transforms this data into an XML file acceptable for uploading, using SFTP (Secure File Transfer Protocol).

**Load:** This step loads the XML file created in the previous step into the Adaptive Planning server, using a data integration web service. In this process, the server logs such things as the credentials of the user doing the uploading, and the timestamp of the upload. The server then performs the final step – the natural account code, department, region, and all other non-numeric fields created in the Transform step above are mapped into the corresponding fields in Adaptive Planning. This tells the server which Adaptive Planning accounts, plans, and other dimensions should receive the uploaded data. The Load step is then executed by the Adaptive Planning server.

Credentials are automatically checked at both ends to ensure tight security.

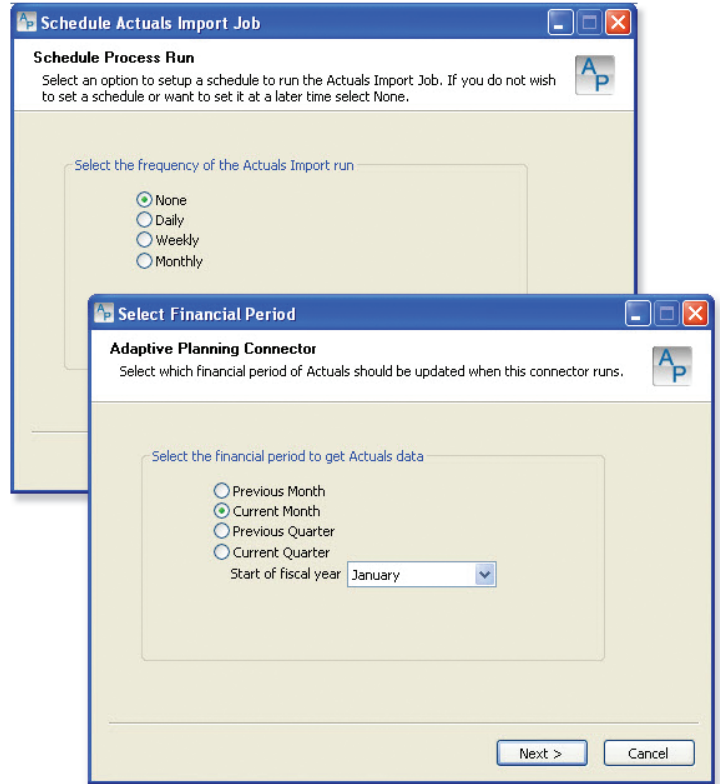
*“Adaptive Planning has really improved our ability to manage to a budget. Once or twice a month, we bring in our actuals, see how we’re trending and make course corrections as needed. It’s easy to re-plan on the fly.”*

– Shilo Jones, President, evo

Customers can configure their own data field mapping for Connectors to commonly-used systems. In the case of particular customer source systems, the Adaptive Planning professional services team can adapt base versions of the Connectors. This team can help customers configure their data uploading (including mapping, reports and documentation, testing and reconciliation, and any other required customization), without requiring access to the customer's local machines.

**Key Features of Connectors**

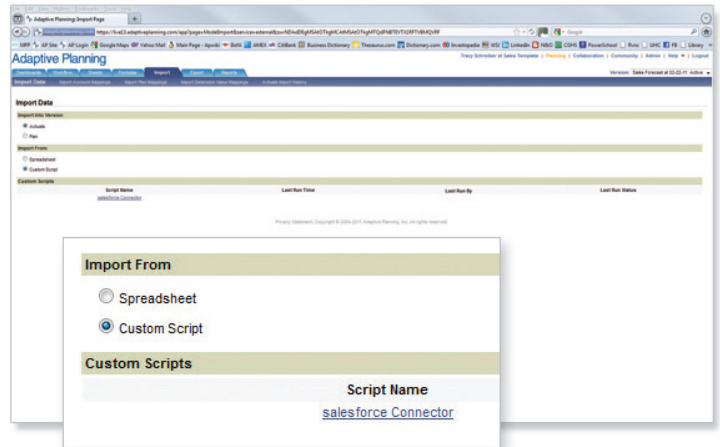
- Fully customizable
- Support all data sources
- Support simple to complex mapping requirements
- Extract, transform and load data automatically
- Support audit and exception reporting, including email alerts
- Can be scheduled to import hourly, daily, monthly, or on-demand
- Enable automated export of Adaptive Planning data into target systems (e.g., GL or data warehouse)



Connector Configuration, Scheduled Run Time Setup

**Streamlined and Secure Data Integration**

The streamlined data integration capabilities of Adaptive Planning support tight integration of actual (historical) and planned (future) data, and up-to-the-minute visibility into variance from plan. They also provide secure, controlled, and auditable integration of data, eliminating cost and user errors associated with manual integration.



Connector Administration Screen

Adaptive Planning has integrated with more than 75 GL and enterprise systems. Examples of source systems where the Adaptive Planning Connector has been implemented include:

- Great Plains 10.0
- Intacct
- Lawson 9.0.1
- MAS 90 4.3
- MAS 500
- Multiview
- NetSuite
- Oracle 11.5.10.2
- Oracle E-Business 11.5
- PeopleSoft 8
- Quickbooks 2004-2010
- Salesforce.com
- SAP R3 4.6c
- Solomon 6.5/7.0
- Native SQL Server 2005
- Generic ODBC 3.x databases

“We use Adaptive Planning to build our annual budget for each of our legal entities. The ability to upload actuals from the general ledger and re-forecast our plan quarterly enables us to review historical actions, trends, projections and monitor our headcount and spending. We could not do this so easily without Adaptive Planning.”

– Gwyn Goodrow, Director, FP&A and Payroll, Shared Technologies



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