Adaptive 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 CPM and BI requires tight integration with multiple systems. These typically include the General Ledger (GL), Customer Relationship Management (CRM) application, Human Resource (HR) system and other elements of the Enterprise Resource Planning (ERP) system, or a centralized data warehouse. Adaptive has several options for integrating with other enterprise systems, located on-premise and in the cloud.

**Connectors**

Adaptive Connectors provide streamlined and secure data integration between Adaptive and other on-premise and cloud-based enterprise systems. Connectors are available for the most common source systems and databases, such as Oracle, Salesforce.com, Intacct, FinancialForce.com, NetSuite OpenAir, Plex Systems, Workday, and others.

**NetSuite Integration**

Adaptive and NetSuite have together developed custom, best-in-class integration that embeds the Adaptive Planning application within NetSuite. It takes minutes to set up, and single sign-on enables NetSuite users to seamlessly access Adaptive Planning once logged in to NetSuite. The NetSuite integration supports bi-directional export/import between the applications and enables users to drill-down from Adaptive Planning into underlying transactions in NetSuite.

“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

**Flat File Import**

Standard Adaptive functionality includes the ability to import data via Excel files, and to export data to Excel or flat files. This is a quick way to get started without IT resources, and is a great option for low volumes of data, data that is only occasionally uploaded, and data that requires little transformation before uploading. The process involves simply mapping source data fields (e.g., project, product, customer, opportunity type, etc.) to corresponding data fields in Adaptive, then importing data.

**Web Services API**

Adaptive API (Application Program Interfaces) can be used by our customers to design and implement custom integrations with on-premise and cloud-based applications. Our API adheres to the principles of RESTful web services, providing a lightweight interface through which users can access and manipulate data that resides within their Adaptive application. It also accepts requests in the form of XML documents, and returns XML documents as responses.

“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
How the Connectors Work

The Adaptive Connectors are highly configurable, customizable software interfaces between the Adaptive products and other enterprise systems. With Connectors, our customers can automate data import, with a fast, simple approach to synchronizing GL and other enterprise system data with their Adaptive products. The Connectors can be run on-demand, or as a scheduled task on a routine basis, e.g., hourly, daily, or monthly.

For integrating with hosted source systems, the Connector is hosted from the Adaptive servers. Users initiate data integration through the Connector via the Import Menu in their Adaptive application. For on-premise source systems, the Connector is installed in a customer’s environment as a Windows application on a desktop or virtual machine and initiated locally.

Whether hosted or on-premise, the Connectors use the same modularized approach to automated data integration:

**Extract:** The first step extracts data from the source system. Raw data is extracted directly from the underlying GL or other enterprise system database, or through APIs provided by the source system.

**Transform:** The next step transforms the data extracted from the source system to match the accounts, plans, and dimensions specific to the customer model in Adaptive Planning. Extracted fields from the previous step are split, combined or otherwise converted to match the customer format used in the Adaptive Planning application.

**Load:** Once data has been transformed for upload, it is packaged into an XML file and uploaded via a web service, using SFTP (Secure File Transfer Protocol). Credentials are automatically checked at both ends to ensure tight security. An upload log is generated, and the initiating user is notified via email of the Connector’s status, as well as the presence of any new accounts or plans from the source system that may require additional mapping directly in the application.

<table>
<thead>
<tr>
<th>BENEFITS OF CONNECTORS</th>
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<tbody>
<tr>
<td>· Time-saving automation</td>
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<tr>
<td>· Streamlined and secure data integration</td>
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<td>· Up-to-the minute visibility into variance from plan</td>
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<td>· Elimination of systems interface design cost and user errors</td>
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Adaptive Professional Services (APS)

The Adaptive Professional Services team can augment your resources or implement entire data integration projects. This team brings the optimum mix of application, business process and technical skills to assist our customers. Customers can import flat files on their own with very little training, or by following instructional videos. They can also design their own interfaces to other enterprise systems, using our Web Services APIs. In any of these projects, our team is available to assist as needed, and to provide a sandbox environment, if required.

Connector Implementation Methodology

Connectors are implemented by APS, who can quickly customize our existing library of standard Connectors to general ledgers or can create a custom interface for unique or more complex enterprise systems such as CRM applications.

At the beginning of a Connector project, our project manager reviews the customer’s data source(s), and prepares a project implementation plan for extraction of historical and ongoing actual data. APS works with the customer’s Finance and IT teams to extract data directly from the customer system and to implement appropriate mapping rules directly in the Connector. Connector imports are tested and validated jointly with the customer.

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

Streamlined and Secure Data Integration

The streamlined data integration capabilities of Adaptive 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 expensive systems interface design costs, and user errors associated with manual integration.

“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
Adaptive has integrated with more than 75 GL and enterprise systems. Examples of source systems where the Adaptive 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 now produce a better budget with Adaptive Planning. In addition, we utilize the Great Plains connector for Adaptive Planning, which has shaved one day’s time off the process when we want to conduct variance analysis. With the connector, it takes less than five minutes to bring ERP data into Adaptive Planning—it’s pretty incredible.”

– Danielle Murcray, CFO, Drobo

“We benefit from using the Great Plains connector for Adaptive Planning. Now with the Connector, it takes less than five minutes to bring ERP data into Adaptive Planning. It’s pretty incredible.”

– Danielle Murcray, Vice President, Finance, Drobo