

Integration Framework

Integrating actuals and transactional data from source systems into the Adaptive Insights Business Planning Cloud enriches planning and accelerates reporting cycles. We offer a range of integration options to connect data from source systems into Adaptive Insights and vice versa. These source systems include GL and enterprise resource planning (ERP) as well as enterprise applications beyond finance, such as customer relationship management (CRM), marketing, and human capital management (HCM)—even custom data sources such as a data warehouse. Adaptive Insights facilitates integration whether the source system is on-premises or in the cloud.

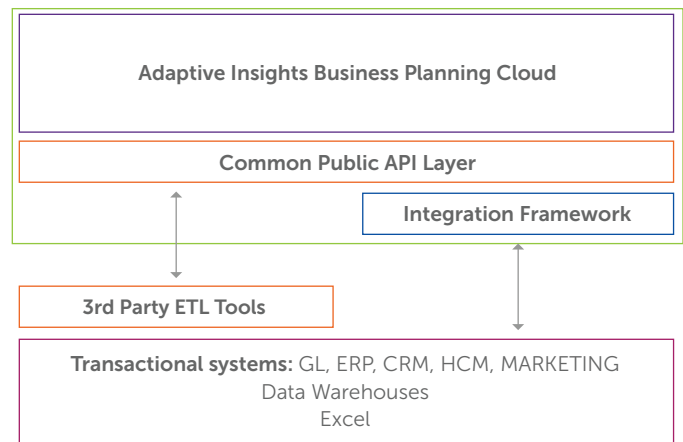
Excel Import/Export

- Import (and export) data via Excel files and export to CSV or Excel; ideal for deployments where planning frequency and data volumes are on the lower side
- Get started quickly without IT resources
- Map source fields (project, product, etc.) to fields in Adaptive Insights, then import

Automated Integration

- Automate metadata import into Adaptive Insights. Synchronize custom dimensions and organizational hierarchies on your source side with corresponding metadata hierarchies in Adaptive Insights.
- Automate data import/export with any data source; ideal for frequently refreshed data or data that requires complex transformations
- Manage data integration across multiple data sources in a self-service manner, in a click-not-code UI experience

- Data or IT analysts can rapidly configure enterprise-class data integrations, connect data sources, define data transformations, and schedule data loads



Integration Framework Key Capabilities and Components

Adaptive Insights can connect with a range of cloud and on-premises source systems, across GL, ERP, HCM, CRM, custom applications, and data warehouse domains. Finance can create end-to-end data integrations that include connecting to data sources, defining data transformations, and scheduling automated data loads. Our integration framework offers the following capabilities:

Connectivity

- Technology foundation to connect to virtually any source system; custom and off-the-shelf, cloud and on-premises
- Professional services expertise and domain knowledge to connect to common ERP, HCM, and CRM systems including Workday, Oracle, SAP, PeopleSoft, NetSuite, Sage Intacct, MS Dynamics, Salesforce and more

Data Transformations

- Data import from any source into the staging area
- Data visualization and transformation in the staging area
- Purpose-built data mapping that aligns the source data with data structures in the Business Planning Cloud
- Self-service cleansing and mashup capability for finance

Value of Adaptive Insights' integration framework

- Purpose-built integration for CPM and analytics
- Ease of use empowers finance to self-manage integrations
- Time savings, error reduction, and accelerated reporting
- Rapid time to value and low total cost of ownership

Adaptive Insights has successfully delivered 2,000-plus integrations across more than 200 different source systems including Workday, Oracle, SAP, NetSuite, Sage Intacct, MS Dynamics (Great Plains), Salesforce, Deltek Vision, Epicor, Sage, Plex, Multiview, and many more.

Our Adaptive Insights professional services team offers Success Packs for rapid implementation of our integration framework. During the engagement, the Adaptive Insights team will work with you to understand your data sources and how that data will be used in your Adaptive Insights model. We will then work with your technical team to deliver an automated integration solution to bring source data in seamlessly on demand or on a schedule.

We offer the following integration Success Packs:

- SAP
- NetSuite
- Intacct
- Salesforce
- Microsoft Dynamics GP
- On-premise systems (JDBC and other protocols)
- Any cloud system
- Flat Files