Adaptive Insights

Adaptive Integration

Adaptive has a full range of integration options to connect your system or data with ours, including general ledgers and other enterprise apps such as ERP, CRM, HR systems and data warehouses, whether located on-premise and in the cloud.
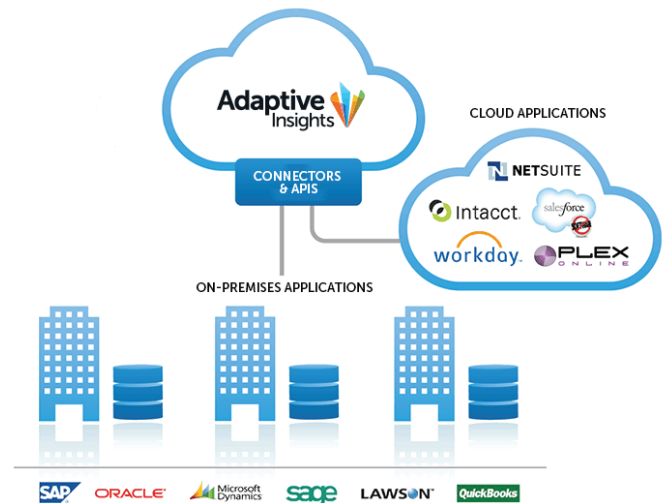
Connectors

- Automated data import/export with any data source; ideal for frequently refreshed data
- Connect to GL, ERP, CRM, HR or data warehouse, on-premises or in the cloud
- Schedule (hourly, daily, monthly) or run on-demand

Excel Import/Export

- Import data via Excel files and export to CSV or Excel; ideal for monthly uploads
- Get started quickly without IT resources
- Easily map source fields (project, product, etc.) to Adaptive, then import

NetSuite & Salesforce Integration

- Single-sign on enables access to Adaptive once logged into NetSuite or Salesforce
- Set-up in minutes
- Use bi-directional export—import between applications
- Drill down from Adaptive into the underlying transactions within NetSuite

Web Services API

- Design and implement your own automated integration to Adaptive products
- Adhere to RESTful Web Services principles

Authentication & Single Sign-On

- Access the Adaptive Suite using Single Sign-On (SSO) to Adaptive from your corporate portal
- Works with leading SSO identity provider solutions like Okta and Microsoft Active Directory Federation Services

Adaptive Integration for Adaptive Discovery Enterprise

- Powerfully manage data integration across multiple data sources into Adaptive Discovery Enterprise for analysis

- Data analysts can easily import spreadsheets into Discovery Enterprise or refresh existing scripted sources in a click-not-code experience

- IT can create enterprise-class data integrations, configure data sources, define data transformations and preparation, as well as automate scheduled data loads
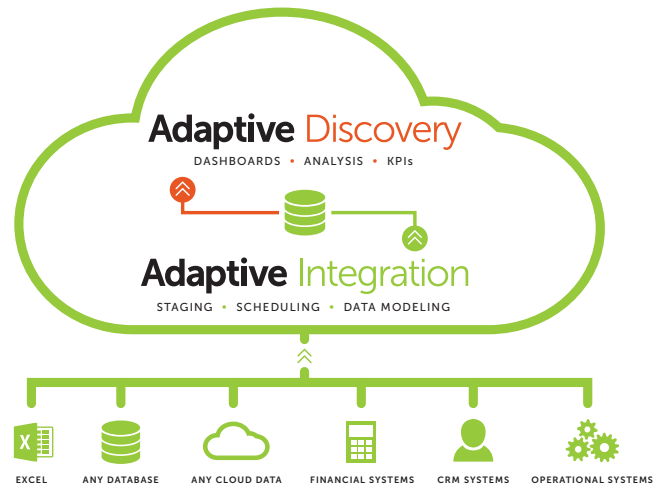
How Integration & Connectors Work

The Adaptive Connectors are highly configurable and customizable. With Connectors, you can automate data import, with a fast, simple approach to synchronizing system data with your Adaptive products. Connectors can be run on-demand, or as a scheduled task on a routine basis. And, Connectors can be used for any data, in both cloud and on-premises systems.

Extract: The first step takes data directly from the underlying GL or other enterprise system database, or through APIs.

Transform: The next step changes, or transforms,the data extracted (accounts, plans, dimensions) to match the customer format used in the Adaptive application.

Load: Once data is transformed it is automatically packaged into an XML file and securely uploaded via a web service, using SFTP (Secure File Transfer Protocol). Credentials are automatically checked at both ends to ensure security and a log is generated, confirming successful upload, and noting any discrepancies (e.g. new or un-matched accounts).

Adaptive Discovery
DASHBOARDS • ANALYSIS • KPIs

Adaptive Integration
STAGING • SCHEDULING • DATA MODELING

EXCEL   ANY DATABASE   ANY CLOUD DATA   FINANCIAL SYSTEMS   CRM SYSTEMS   OPERATIONAL SYSTEMS

Benefits of Connectors

- Time-saving data import automation
- Streamlined and secure data integration

Adaptive has integration & connection options to more than 75 of the top and most common business systems and databases. A few examples of systems include, but are not limited to, the following.

- Deltek Vision
- NetSuite*
- QuickBooks*
- Epicor
- Oracle
- Sage
- Intacct*

- Plex
- Salesforce
- Multiview
- SAP
- Microsoft Dynamics (AX, GP, NAV, SL)
- and many more

*Pre-configured Connector

Don't see your system in the list? Simply contact us for additional details

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