

# Adaptive Insights Training

*On-site and Remote Training  
Catalogue*

**2017**

**TRIDANT**  
data driving decision making

Adaptive  
Insights 

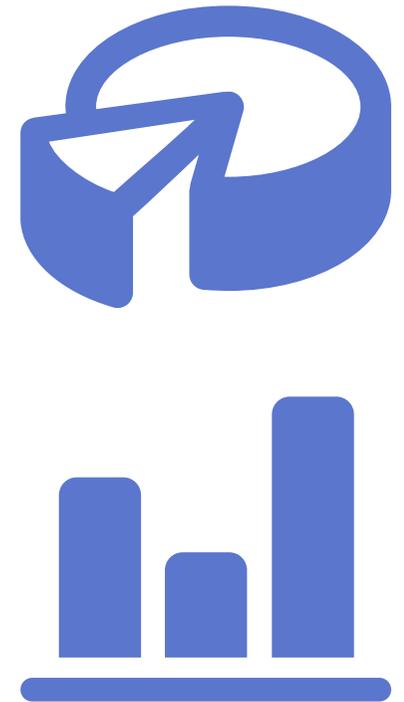
PARTNER

# Adaptive eLearning

- Annual planning subscriptions provide access to the Adaptive eLearning portal.
- Provides access to short video collections by product with specific learning paths.
- Portal provides a convenient way to stay on top of features and learn how to incorporate them into your model design.

# When eLearning is not enough

- eLearning is a valuable resource to brush up on particular skills or meet an immediate learning gap. Its effectiveness relies on commitment from the trainee to remove all distractions from their work day and methodically step through the courseware.
- Working with our clients, we have learnt that affording uninterrupted time to the eLearning training programs is challenging (most of us don't have a door we can close to our office or a phone we can stop from ringing!). Further, the time that is often dedicated to online training is too short to be effective or scheduled at a time where concentration-levels are waning such as 4pm on a Friday afternoon. The result is that the program is completed but often the context and how to apply the theory gets lost.
- In our experience, learning is best conceptualised when applied to real-world examples through practical exercises and interactive demonstrations – this is not offered through the eLearning video- based training program.



# Why Tridant Training?

Tridant is one of Australia-Pacific's most reputable specialist consulting firms, focused on implementing **Business Intelligence, Performance Management, Information Management, Advanced Analytics** and **Cloud Solutions** for public and private sector organisations.

Our experience delivering Adaptive Insights solutions across a range of industries means you can use, manage, maintain or develop the application leveraging proven best practices.

All our training sessions can be flexibly tailored to meet your busy schedules and are presented by certified, expert and technical trainers.

Tridant's mission is to empower you with the training you need, so that you can work with total confidence. We put you in control of your investment!

To find out  
more about

**Tridant**

contact us:

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# Training Options

**ADAPTIVE INSIGHTS  
ONLINE**

**TRIDANT**

## **ADAPTIVE eLEARNING**

Adaptive eLearning provides 24/7 access to short video collections by product with specific learning paths and a yearly subscription for as many users as necessary. With fresh content always added, it's the most convenient way to stay on top of features and learn how to incorporate them into your model design.

## **ONSITE, INSTRUCTOR-LED TRAINING**

Considered the most effective option. It involves real-time interaction, in-depth information sharing and a direct response to questions. Few educational opportunities are considered more valuable than meeting and interacting with an instructor or staff support for various programs.

## **VIRTUAL, INSTRUCTOR-LED TRAINING**

Allows for participation anywhere with Internet access. Class slides, demonstrations, and relevant documents can be viewed simultaneously via a web browser. Students save on travel time and expenses. Each web-based training course is facilitated by a Tridant instructor and may include relevant staff members. Participants also have an opportunity to ask questions during the session.

# Training Roadmap

	PRICE + GST (AUD)	ANALYSTS/ MANAGERS	ADMINISTRATORS/ DEVELOPERS
<b>Adaptive Planning   Adaptive Reporting</b> End- User Training Basics with the Adaptive Suite	\$2,000	✓	
<b>Adaptive OfficeConnect</b> Design & Administration with Adaptive OfficeConnect	\$2,000	✓	✓
<b>Adaptive Discovery</b> Visual Designer in Adaptive Discovery Professional	\$3,000	✓	✓
<b>Adaptive Planning   Adaptive Reporting</b> Planning Administrator I	\$3,000		✓
<b>Adaptive Planning   Adaptive Reporting</b> Planning Administrator II - Implementation	\$5,000		✓
<b>Adaptive Integration</b> Integration Fundamentals & Custom Data Sources	\$3,000		✓

# End - User Training Basics with the Adaptive Suite



**BEGINNER**



**DURATION**  
0.5 days



**ATTENDEES**  
Up to 8 users

## OVERVIEW

This course is intended for new users to Adaptive Insights who will be working with the Planning module for the preparation or review of budgets and forecasts. Attendees will create their own business reports including variance analysis using the Adaptive Reporting module integrated with Planning.

## PREREQUISITES

- There are no prerequisites for this training.

## LEARNING OBJECTIVES

- Configure user preferences such as updating login password, homepage and other personal details.
- Understand how to work with and enter data sheets including spreading options, notes and collaboration, basic formulas, audit trail and cell exploration and display options.

## AUDIENCE

- Business users, budget owners working with the Adaptive Suite for the first time.
- Business users, budget owners requiring refresher training or needing to address specific learning gaps.

# Design & Administration with Adaptive OfficeConnect



INTERMEDIATE



DURATION  
0.5 days



ATTENDEES  
Up to 8 users

## OVERVIEW

This course is designed for analysts and report developers alike who will be using Adaptive OfficeConnect for the development of pixel-perfect management board and statutory reports and ad-hoc requirements. Through a series of practical exercises, attendees will create Excel reports and learn how to create dynamic links from an Adaptive Planning database. Attendees will work with relative time periods and learn how to roll reports forward from one period to the next. Using a combination of native Microsoft Office functionality and Adaptive OfficeConnect, Excel content including narrative data will be linked to Word and PowerPoint documents.

## LEARNING OBJECTIVES

- Utilise query elements to build financial reports
- Configure relative and fixed calendars
- Include dynamic labels in reports
- Apply query elements to existing Excel reports
- Link tables and narrative data from Adaptive OfficeConnect for Excel to Adaptive OfficeConnect for Word and PowerPoint

## PREREQUISITES

Prior experience with data extractions and transformations is highly recommended

- Familiarity with Adaptive Planning terminology is helpful but not required.

## AUDIENCE

- Finance or IT administrators and analysts who will be creating and maintaining integration between their source data and Adaptive Planning

# Visual Designer in Adaptive Discovery Professional



INTERMEDIATE



DURATION  
1 day



ATTENDEES  
Up to 8 users

## OVERVIEW

This data visualization class is designed for beginner to intermediate users of Discovery Professional. The class will begin reviewing the user navigation features of the product including drill-through analysis, understand the use of all dials available and the means by which to present and interact with these. Attendees will explore the setup of perspectives and dashboards using Discovery Professional Visual Designer. This includes the development of scorecards with thresholds and indicators, design of various charts and graphs, and publishing and presenting dashboard content. The training is also designed for those administering Discovery including discussion of security features.

## LEARNING OBJECTIVES

- Navigate the Adaptive Discovery workspace
- Define thresholds and indicators
- Create scorecards
- Design various dials, including charts, grids and gauges
- Build dashboards and publish perspectives
- Configure administration and security
- Explore end user interface

## PREREQUISITES

- Experience with Adaptive Planning data structures – chart of accounts, levels, dimensions, versions.
- Completion of End-User Training Basics preferred but not essential.

## AUDIENCE

- New users to Adaptive Discovery who will be designing visualisations for their company
- Users who may have inherited an existing Discovery deployment or want formal training to configure, manage and maintain Discovery

# Planning Administrator I



**INTERMEDIATE**



**DURATION**

1 day



**ATTENDEES**

Up to 4 users

## OVERVIEW

This class is designed for power-users delegated as administrators in Adaptive Planning. Attendees will learn how to work with foundation structures such as chart of accounts, levels, dimensions and attributes. The training will demonstrate how to manage versions for a range of planning requirements such as for working budgets, quarterly and rolling forecasts. Attendees will explore the design of sheets and assumptions and learn how to add or delete accounts and/or dimensions and work with basic formulas. Other administrative functions such as managing currencies, import and export functions and user security will also be covered. The final 2 hours will be dedicated to working with Adaptive Reporting, learning all about matrix reports and the web-based builder for management and ad-hoc reports. Including how to design P&Ls, create version comparison reports, utilise conditional formatting, and more.

## PREREQUISITES

- Implementation Readiness eLearning course recommended
- Reporting Design eLearning course recommended

## LEARNING OBJECTIVES

- Configure foundational structures including versions
- Build dimensions and level attributes
- Manage sheets and assumptions
- Define formula functions and term modifiers
- Configure users and define workflow
- Manage user roles and permissions
- Build basic matrix reports

## AUDIENCE

- System administrators new to Adaptive Planning
- Planning Administrators who want formal training on configuring, evolving, and maintaining their organisation's model

# Planning Administrator II - Implementation



**ADVANCED**



**DURATION**  
2 days



**ATTENDEES**  
Up to 4 users

## OVERVIEW

As an extension to the Planning Administrator I training, in addition to this content, this advanced class will provide attendees with the foundations to be capable of implementing an Adaptive Planning model or support the evolution to an existing solution. Particular focus will be given to sheet design and the building and maintenance of models, in particular, modelling for operational and capital expenditure, personnel costs, product and service revenue. Attendees will have access to a working instance of Adaptive Planning to consolidate their learning through a series of hands-on exercises where a series of standard, modelled and cube sheets will be created to showcase their practical application in a real-life implementation.

## PREREQUISITES

- Implementation Readiness eLearning course recommended
- Reporting Design eLearning course recommended

## LEARNING OBJECTIVES

- Configure foundational structures
- Import existing financial values
- Build dimensions and level attributes
- Build standard sheets for operational expenditure
- Build standard sheets with optional dimensions
- Create modelled sheets for capex, personnel and travel
- Create cube sheets for product revenue

## AUDIENCE

- Planning Administrators who want formal training on configuring, evolving, and maintaining their organisation's model
- Administrators and developers wishing to self-implement or add or modify modelling

# Integration Fundamentals & Custom Data Sources



**ADVANCED**



**DURATION**  
1 day



**ATTENDEES**  
Up to 4 users

## OVERVIEW

This course covers the Adaptive Integration architecture and process required to load data from any source system to Adaptive Planning sheets. Attendees will learn how to load data into Adaptive Planning by creating components in Data Designer, the interface for Adaptive Integration as well as understand the different components and their functionality, exploring common repeatable data transformations in the cloud-based staging area. After integrating with flat file data sources, the course will demonstrate how to use Adaptive Integration for connecting to on premise source systems.

## LEARNING OBJECTIVES

- Discuss the Adaptive Integration architecture and dataflow process
- Import data to the Adaptive Integration staging area from a spreadsheet using the spreadsheet data source
- Perform common repeatable data transformations in the staging area
- Map staging area data to a Planning sheet in a Planning loader
- Understand steps to install and configure the Adaptive Data Agent Service Manager
- Load data to sheets in Adaptive Planning with a Planning loader and an integration task
- Work with scheduling in the integration task
- Use the data agent component to connect the on premise source system to the Adaptive Integration server
- Import data to the Adaptive Integration staging area from an on premise JDBC-compliant database using the generic JDBC data source

## PREREQUISITES

- Prior experience with data extractions and transformations is highly recommended
- Familiarity with Adaptive Planning terminology is helpful but not required.

## AUDIENCE

- Finance or IT administrators and analysts who will be creating and maintaining integration between their source data and Adaptive Planning

# Need more personalised training?

Tridant's experienced Adaptive Insights consulting team can tailor a training and development program to suit your user base.

We can train you in your own Adaptive Insights instance.

We can come to you or alternatively facilitate training from our Tridant Training Centre.

**Contact us today about a custom Adaptive Insights training solution for your business!**

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