

## Workday Adaptive Planning Integration

Integrating actuals and transactional data from source systems into Workday Adaptive Planning enriches planning and accelerates reporting cycles. We offer a range of integration options to connect data from source systems into Workday Adaptive Planning 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 HR systems—even custom data sources, such as a data warehouse.

### Facilitate Integration—On Premise or in the Cloud

#### Microsoft Excel Import/Export

- Import and export data via Microsoft Excel files and export to CSV or Excel; ideal for deployments with lower planning frequency and data volumes
- Get started quickly without IT resources
- Map source fields (project, product, and more) to fields into Workday Adaptive Planning, then import

#### Automated Integration

- Automate data import/export with any data source; ideal for frequently refreshed data or data that requires complex transformations
- Manage data integration across multiple prebuilt data sources via self-service in a click-not-code UI experience
- Rapidly configure enterprise-class data integrations, connect data sources, define data transformations, and schedule data loads

#### Custom Scripted Integrations

- Robust API platform enables custom integration to export/import your plan data directly to third-party cloud systems
- Custom cloud data source and custom cloud loader provide the ability to write custom scripts to integrate with any standards-based third-party API
- Specialized logic can be inserted, transforming while taking advantage of integration framework components

### Key Benefits

- Reliable access to source data from your CRM, HCM, or ERP systems, or any transactional system
- Automated data flows allow more time for data analysis
- Success packs for rapid implementation for:
  - NetSuite
  - Intacct
  - Salesforce
  - Dynamics GP
  - JDBC type
  - Flat files

## Integration Framework Key Capabilities and Components

Workday Adaptive Planning can connect with a range of cloud and on-premise source systems across GL, ERP, 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:

### Connectivity

- Technology foundation to connect to virtually any source system; custom and off-the-shelf, cloud and on-premise
- Professional services expertise and domain knowledge to connect to common ERP, HR, and CRM systems including 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 Workday Adaptive Planning
- Self-service cleansing and mashup capability for finance

### Monitoring and Alerts

- Event-based alerts
- Monitoring to detect issues early

### Value of Integration with Workday Adaptive Planning

- Purpose-built integration for planning 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

Workday Adaptive Planning has successfully delivered 1,500-plus integrations across more than 100 different source systems including Oracle, SAP, NetSuite, Sage Intacct, MS Dynamics (Great Plains), Salesforce, Deltek Vision, Epicor, Sage, Plex, Multiview, and many more. Our Workday Adaptive Planning professional services team offers success packs for rapid implementation of our integration framework. During the engagement, the Workday team will help you understand your data sources and how that data will be used in your Workday Adaptive Planning model. We will then work with your technical team to deliver an automated integration solution to bring source data in seamlessly on demand or by schedule.



The Workday Adaptive Planning integration framework has significantly enriched our planning and reporting processes. Automation of integration between our source systems and Workday Adaptive Planning has helped us increase the timeliness and frequency of reporting to our business users while reducing error risk.

### First West Credit Union

To learn more about the Workday Adaptive Planning integration framework, visit: [adaptiveplanning.com/products/adaptive-integration](https://adaptiveplanning.com/products/adaptive-integration).



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