THE GLOBAL LEADER IN CLOUD BI & CPM

Visual Design Spec

12.18.2013

Last edited by Jerry Lee, Adaptive Insight

Adaptive Planning **Adaptive** Consolidation **Adaptive** Discovery

Adaptive Integration **Adaptive** Reporting

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Project information & contacts

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Objective	To communicate functional redesign of Adaptive Planning Service. Details on navigation, dashboard, sheets, reports, file browsing and notes.
Method	Contextual research, stakeholder interviews, interaction design, visual design

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Adaptive Insight

Visual documentation

Overview

- Look & feel
- Main colors
- Colors
- Typography
- Buttons and button styles
- Icon styles
- Touch UI rules

Main Structure

- Dashboard
- Discovery
- Sheets overview
- Sheets

Navigation

- Top bar
- Navigation trees
- Search
- Toolbars

Secondary Components

- Modal windows
- Wizard
- Settings
- Version and level selector
- Form components
- Context menu
- System messages
- System malfunction
- News & process alerts
- Notes
- Side panels
- Modeless overlays
- Explore cell
- Spinners and loaders
- Saving states
- Slider
- Date and time pickers
- Drag and drop
- Tree structure

Secondary Components *(continued)*

- Panels
- Panel toolbars
- Tabs
- Table grid column headers
- Grid footer and search
- Global footer

Start page

- Widgets
- Organizing widgets
- Scaling the widget screen

Discovery

- Example screens

Sheets

- Standard sheet
- Modeled sheet
- Cube sheet
- Toolbar
- Secondary toolbars
- Toolbar icons
- Action bar
- Cell sizes
- Drop downs
- Cell states
- Formula toolbar
- Version comparison mode

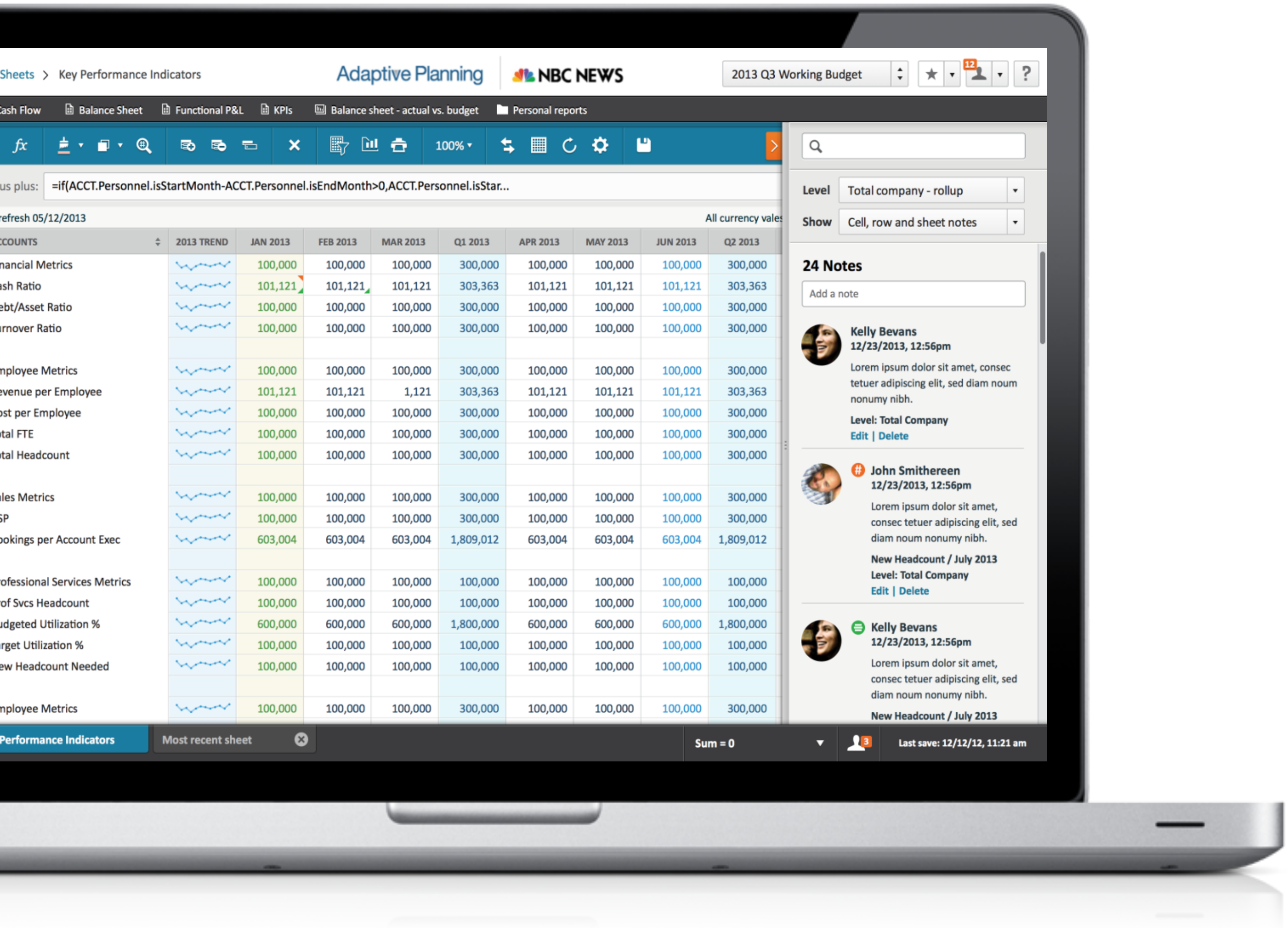
Netsuite Integration

- Main navigation
- Example of a page

Overview

Overview

Look & Feel


Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
?
ash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Level
Show
Performance Indicators
Most recent sheet
Sum = 0

us plus: =if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

refresh 05/12/2013

All currency vales

CCOUNTS	2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013
nancial Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
ash Ratio		101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363
ebt/Asset Ratio		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
rnover Ratio		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
nployee Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
evenue per Employee		101,121	101,121	1,121	303,363	101,121	101,121	101,121	303,363
ost per Employee		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
tal FTE		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
tal Headcount		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
les Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
SP		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
ookings per Account Exec		603,004	603,004	603,004	1,809,012	603,004	603,004	603,004	1,809,012
ofessional Services Metrics		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
of Svcs Headcount		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
udgeted Utilization %		600,000	600,000	600,000	1,800,000	600,000	600,000	600,000	1,800,000
rget Utilization %		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
ew Headcount Needed		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
nployee Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000

Level: Total company - rollup

Show: Cell, row and sheet notes

24 Notes

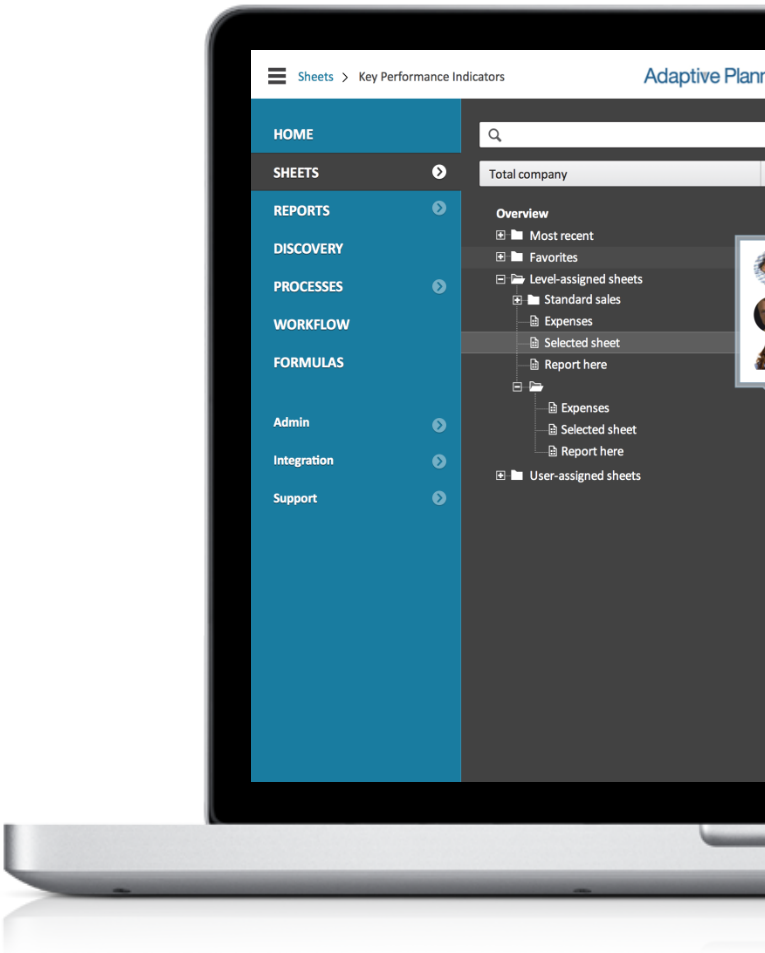
Add a note

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Edit | Delete

John Smithereen
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
New Headcount / July 2013
Level: Total Company
Edit | Delete

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
New Headcount / July 2013

Last save: 12/12/12, 11:21 am


Sheets > Key Performance Indicators
Adaptive Plann
HOME
SHEETS
REPORTS
DISCOVERY
PROCESSES
WORKFLOW
FORMULAS
Admin
Integration
Support

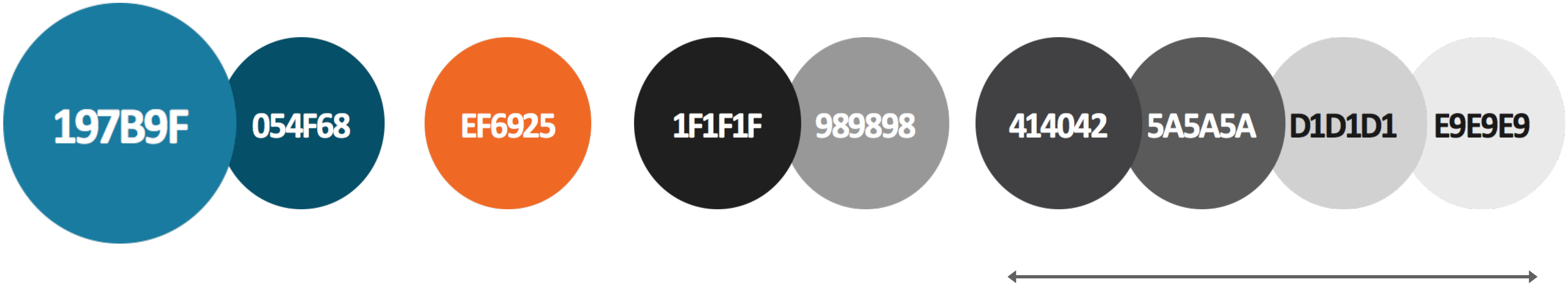
Total company

Overview
- Most recent
- Favorites
- Level-assigned sheets
  - Standard sales
    - Expenses
    - Selected sheet
    - Report here
  -
    - Expenses
    - Selected sheet
    - Report here
- User-assigned sheets

Overview

Main colors

✓ Approved


197B9F
054F68
EF6925
1F1F1F
989898
414042
5A5A5A
D1D1D1
E9E9E9

Blue
Used as main accent color, toolbars, buttons and links

Dark Blue
Used as complementary accent color, tabs and shadows

Orange
Used as accent color and buttons

Black
Used as main text color

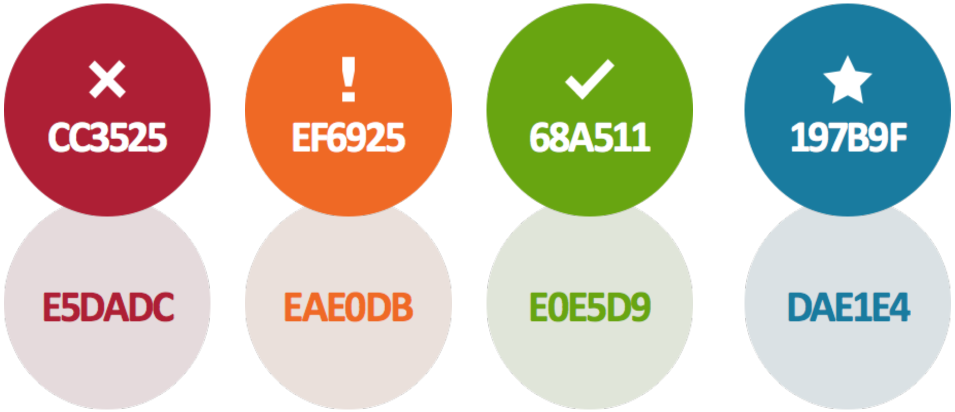
Medium gray
Secondary text color in sub headers and metadata

Gray
Used in defining large UI areas and outlines

Overview

Alert colors

✓ Approved



✕ CC3525

! EF6925

✓ 68A511

★ 197B9F

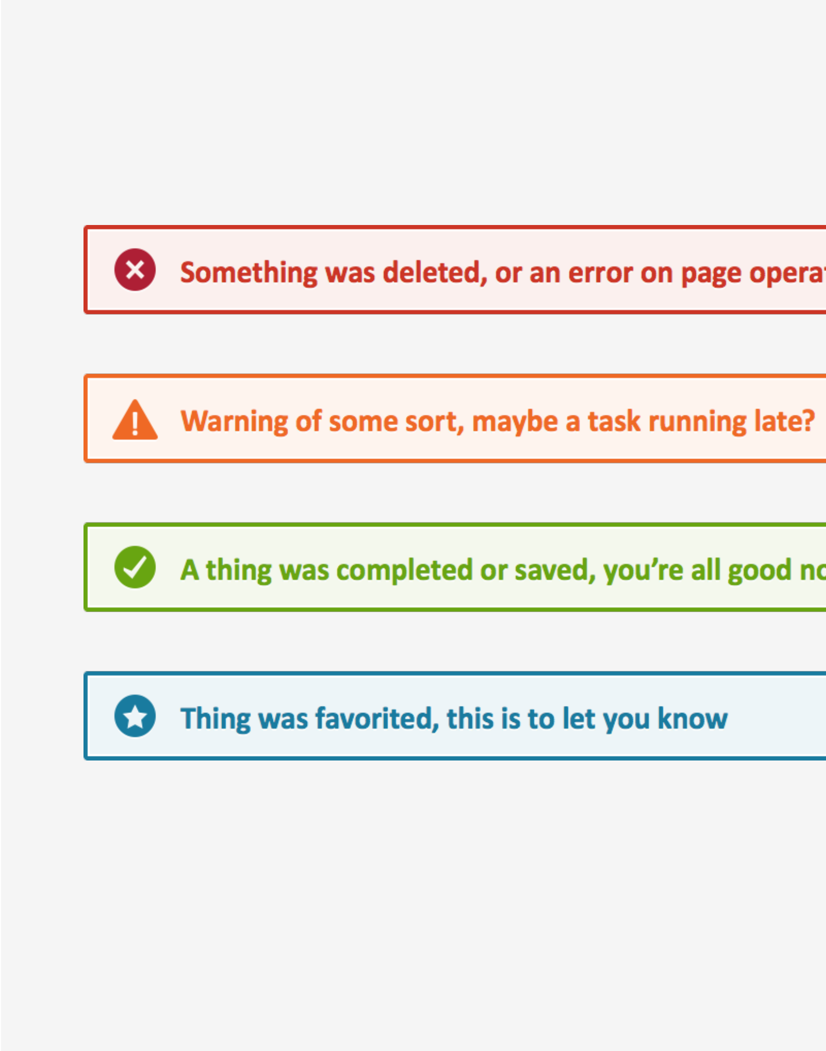
E5DADC

EAE0DB

E0E5D9

DAE1E4

Used as alert colors for
system and process alerts



✕ Something was deleted, or an error on page opera

⚠ Warning of some sort, maybe a task running late?

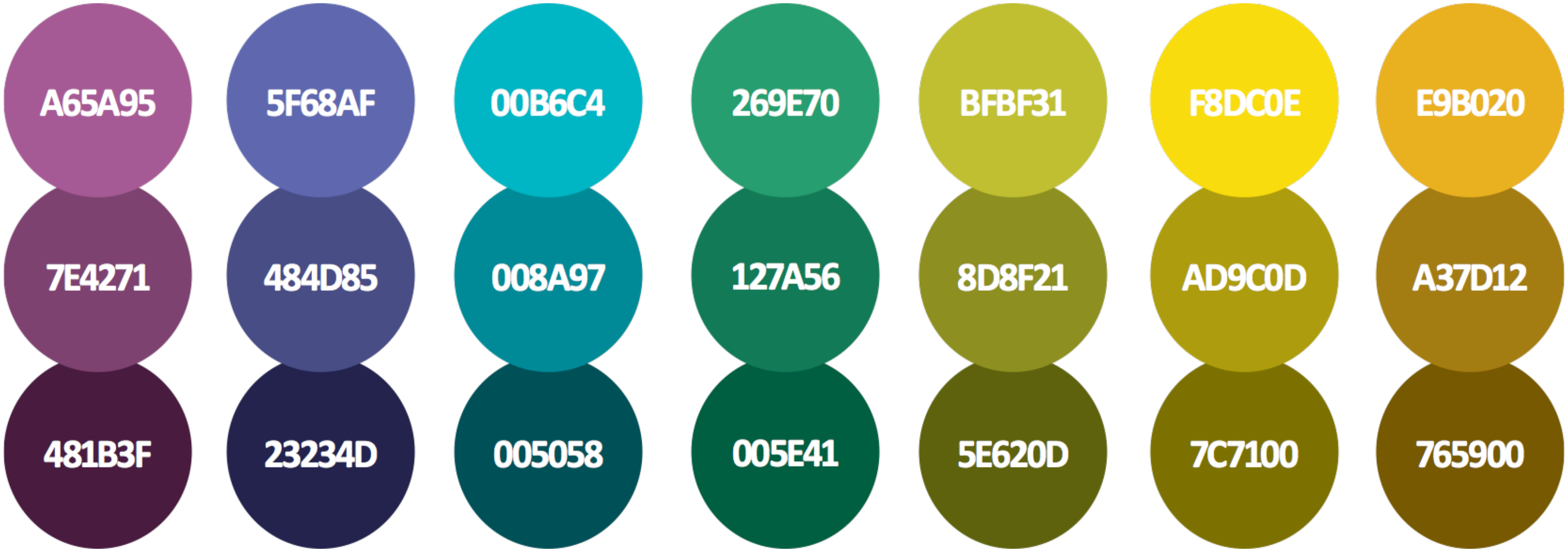
✓ A thing was completed or saved, you’re all good no

★ Thing was favorited, this is to let you know

Overview

Discovery colors

✓ Approved



A65A95	5F68AF	00B6C4	269E70	BFBF31	F8DC0E	E9B020
7E4271	484D85	008A97	127A56	8D8F21	AD9C0D	A37D12
481B3F	23234D	005058	005E41	5E620D	7C7100	765900

Used as secondary colors
for charts and graphs

Typography

Approved

Calibri Regular
Calibri Italic
Calibri Bold

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj
Kk Ll Mm Nn Oo Pp Qq Rr Ss
Tt Uu Vv Ww Xx Yy Zz

1234567890 ~!@#$%^&*()

(H1) Page header	1.563em Regular, Leading 1.875em
(H2) Page header	1.188em Bold, Leading 1.5em
(H3) Secondary header	1.063em Bold, Leading 1.125em
(P1) Body text 1	0.938em Regular, Leading 1.125em
(P2) Body text 2	0.813em Regular, Leading 1.125em
(P3) Tooltip text	0.813em Regular, Leading 1.125em
(P4) Small details	0.688em Regular, Leading 0.750em

Overview

Font substitution: Arial, Helvetica, Sans Serif

✓ Approved

If Calibri is not available, substitute with Helvetica, Arial, or generic Sans Serif but decrease the font size by 1pt. Leading stays the same.

(H1) Page header	1.500em Regular, Leading 1.875em
(H2) Page header	1.125em Bold, Leading 1.5em
(H3) Secondary header	1.000em Bold, Leading 1.125em
(P1) Body text 1	0.875em Regular, Leading 1.125em
(P2) Body text 2	0.750em Regular, Leading 1.125em
(P3) Tooltip text	0.750em Regular, Leading 1.125em
(P4) Small details	0.625em Regular, Leading 0.750em

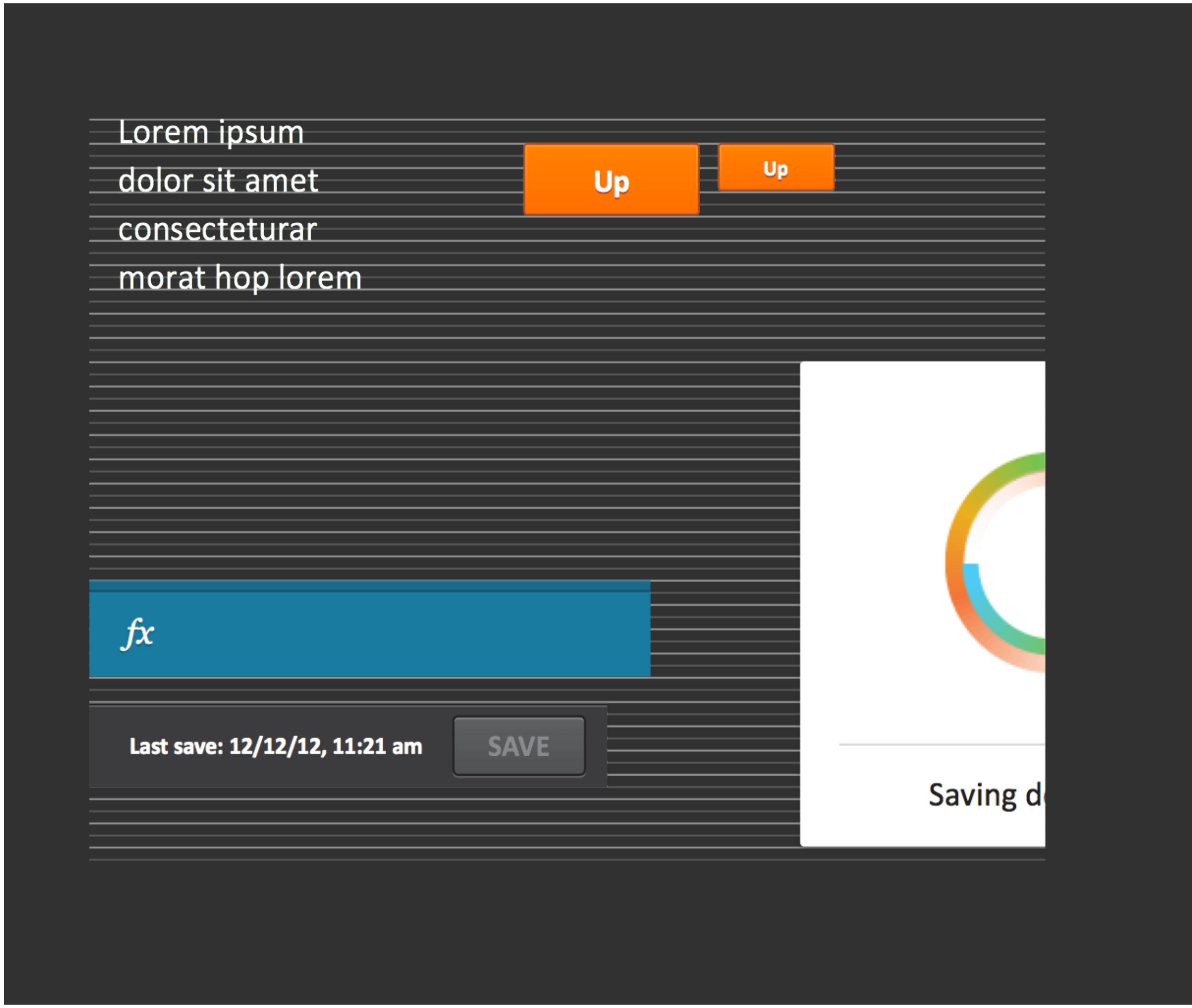
Overview

Baseline grid

Approved

A basic vertical unit in the interface is 6px (0.375em). Most components should fall into this baseline grid, as well as the text leading.

So basic basic component heights should be around 12, 18, 24, 30, 36, 42, 48, 54px and so on.



Lorem ipsum
dolor sit amet
consectetur
morat hop lorem

Up
Up
fx
Last save: 12/12/12, 11:21 am
SAVE
Saving d

Overview

Link behavior

✓ Approved

Link color: #197B97

Link hover: #074f68, underline

» Link with arrows in front

» Link with arrows in front hover

When a new window will be opened on click

› Link with arrow in front

› Link with arrow in front hover

For admin screen; does not open in a new window

Overview

Buttons

✓ Approved

Background

Buttons can appear on light or dark backgrounds. The outer stroke of the button color needs to change on dark backgrounds, as well as the lighter grey button needs to change to darker grey.

Size

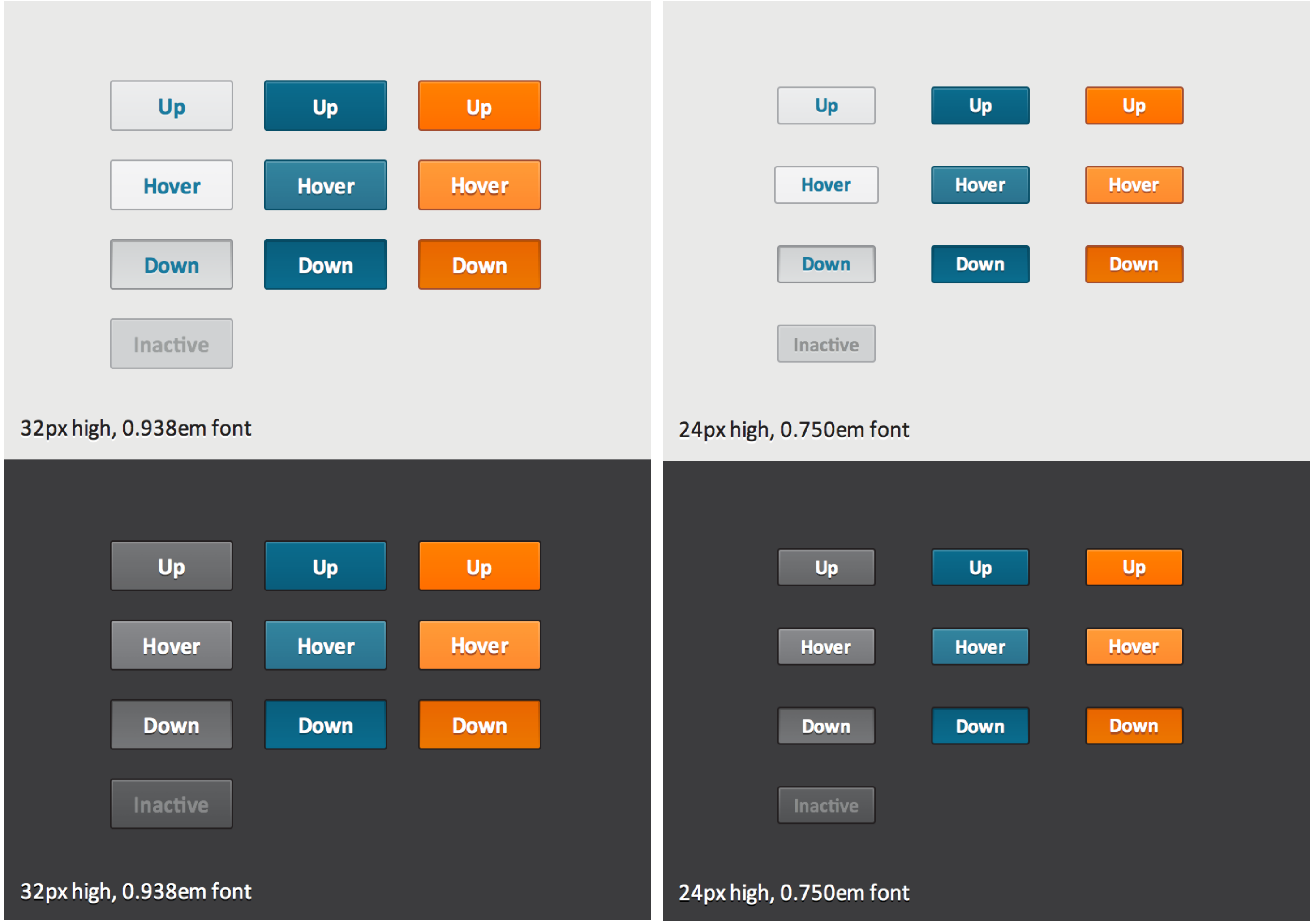
The 32px high button is the default and should be used in most contexts. Use smaller 24px high buttons in modeless overlay footers and in other contexts where the normal sized button would be unwieldy.

Color

Blue is the main action color

Grey is the secondary button color

Orange is used when an action needs to be more prominent.


Up
Up
Up
Hover
Hover
Hover
Down
Down
Down
Inactive
32px high, 0.938em font
Up
Up
Up
Hover
Hover
Hover
Down
Down
Down
Inactive
24px high, 0.750em font
Up
Up
Up
Hover
Hover
Hover
Down
Down
Down
Inactive
32px high, 0.938em font
Up
Up
Up
Hover
Hover
Hover
Down
Down
Down
Inactive
24px high, 0.750em font

Overview

Button specs, light background

Approved

NOTE: On dark grey or black background (but not on teal), substitute the outer stroke of teal and orange buttons with #231f20

🟧 1px stroke, #a24e31
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #ff8000 – #ff7001

🟧 1px stroke, #a24e31
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #ff9a36 – #ff8c30

🟧 1px stroke, #a24e31
Top inner bevel stroke, 20% opaque #a24e31
Gradient: #ea6700 – #ec7600

🟦 1px stroke, #064f68
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #0a6b8e – #0a5d7d

🟦 1px stroke, #064f68
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #31859e – #2c7490

🟦 1px stroke, #064f68
Top inner bevel stroke, 20% opaque #000000
Gradient: #095d7c – #0a6b8e

⬜ 1px stroke, #a6a8ab
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #edeeef – #e6e7e8

⬜ 1px stroke, #a6a8ab
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #f7f7f8 – #f1f1f2

⬜ 1px stroke, #a6a8ab
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #d1d3d4 – #dddedf

⬜ 1px stroke, #a6a8ab
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #d0d2d3 – #d0d2d3

⬛ 1px stroke, #231f20
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #757678 – #666769

⬛ 1px stroke, #231f20
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #898a8d – #77797c

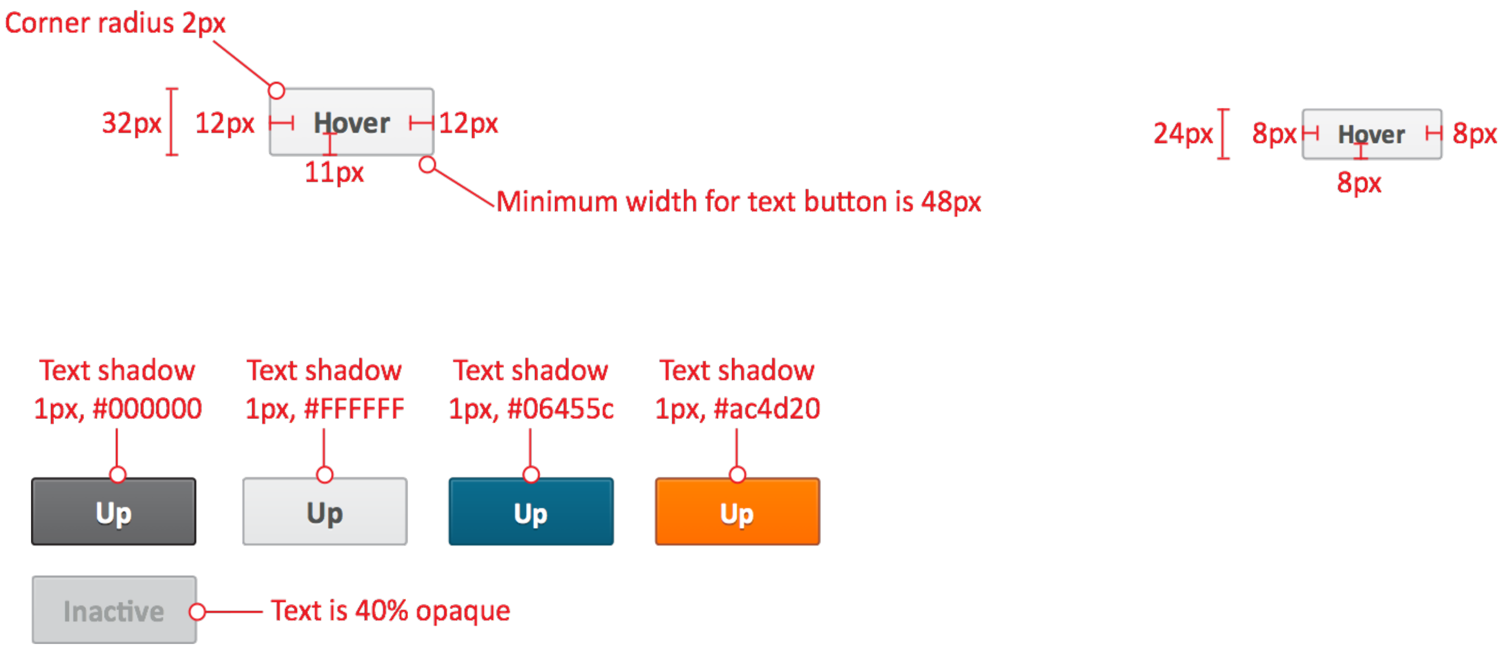
⬛ 1px stroke, #231f20
Top inner bevel stroke, 20% opaque #000000
Gradient: #656668 – #747577

⬛ 1px stroke, #231f20
Top inner bevel stroke, 20% opaque #FFFFFF
Gradient: #5e5f61 – #525355

Overview

Button specs

✓ Approved



Corner radius 2px

32px 12px 12px

11px

Minimum width for text button is 48px

24px 8px 8px

8px

Text shadow 1px, #000000

Text shadow 1px, #FFFFFF

Text shadow 1px, #06455c

Text shadow 1px, #ac4d20

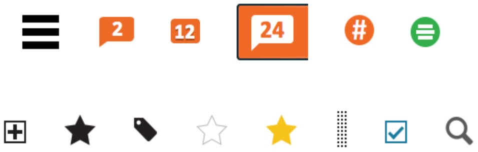
Text is 40% opaque

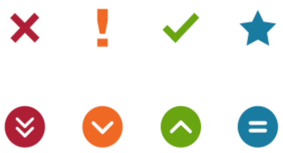
Hover
Hover
Up
Up
Up
Up
Inactive

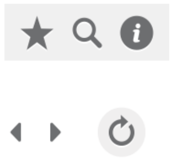
Overview

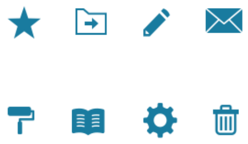
Icon styles

Approved









Colored icons
Navicon used in tool bar

Comment icons used in sheets and reports

Black and gray icons used in overview screens

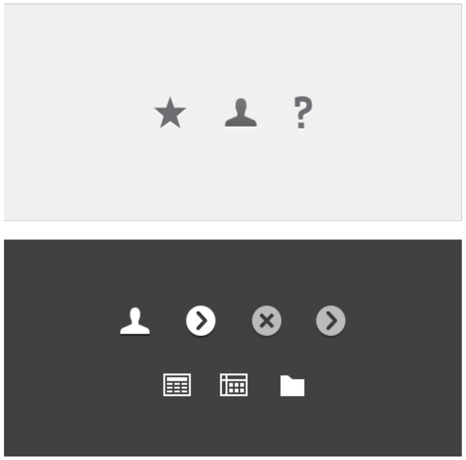
Alert icons
Used in process tracker, discovery and alert messages

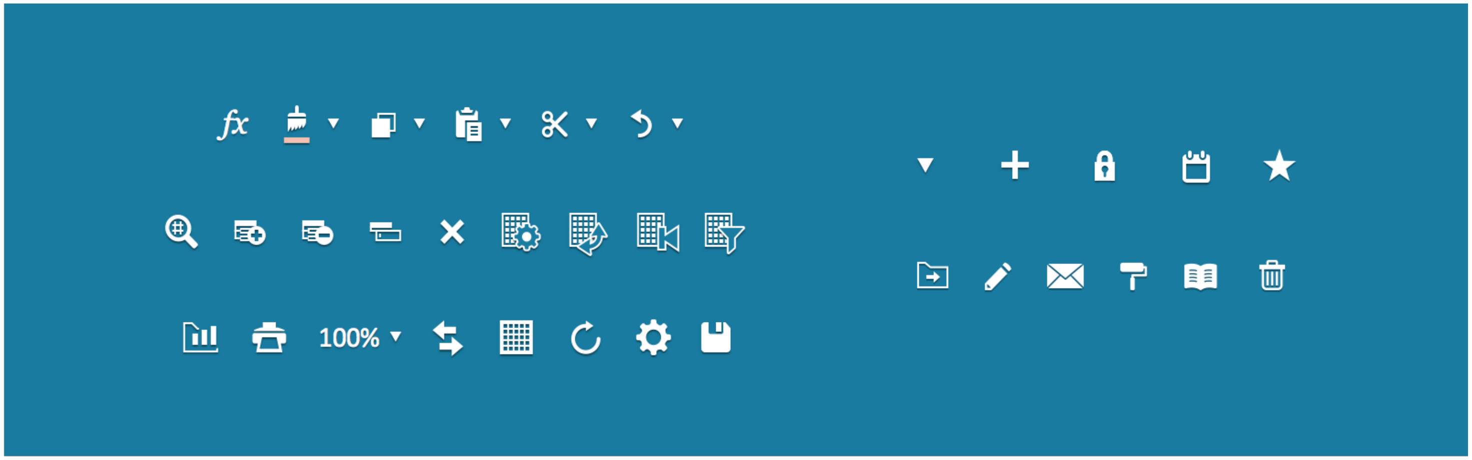
Dial icons
Used in discovery dials on mouse over

Teal icons on white bg
Used in dashboard widgets and overview drop down menu

Icon styles

Approved





Gray icons on light bg
Used in tool bar buttons

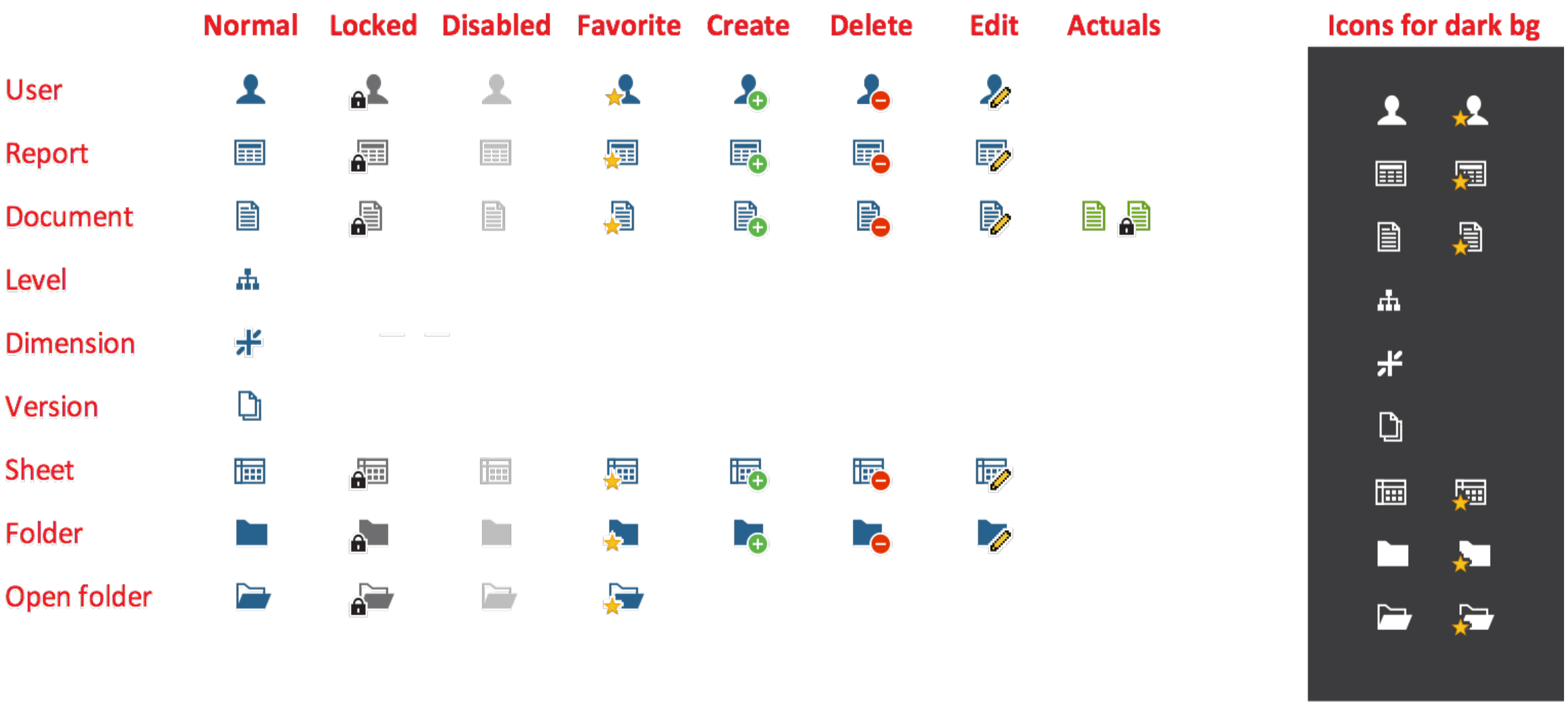
White icons on dark gray bg
Used in navigation menu, favorites bar and bottom action bar

White icons on teal bg
Used in sheets toolbar, process tracker and overview screens

Overview

Document icons

Approved

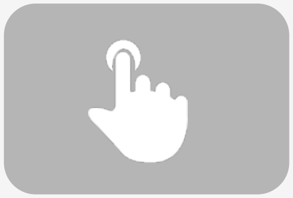

Normal
Locked
Disabled
Favorite
Create
Delete
Edit
Actuals
Icons for dark bg
User
Report
Document
Level
Dimension
Version
Sheet
Folder
Open folder

These icons are used across service in tree structures and in front of document lists. Use a negative pure white icon on teal or black background. All icons fit into a 16x16 container.

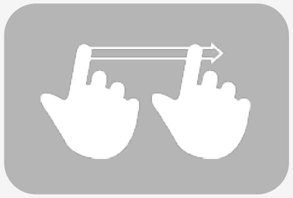
Basic Layout

Touch UI: Gestures

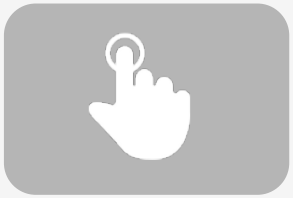
Approved



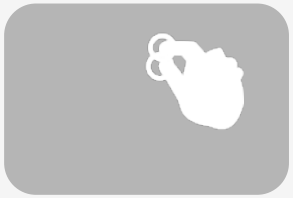
Press (>500ms)
Select item, or in case of drag and drop item, pick the item up.



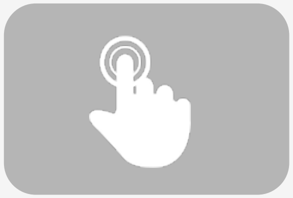
Drag
Use for scrolling page, horizontally or vertically



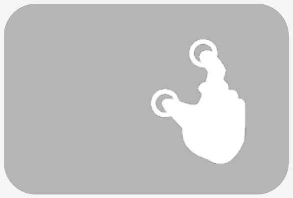
Tap (<500ms)
Focus item (f.ex. select a cell in a sheet)



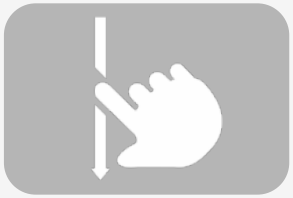
Pinch
Zoom out to 100% size



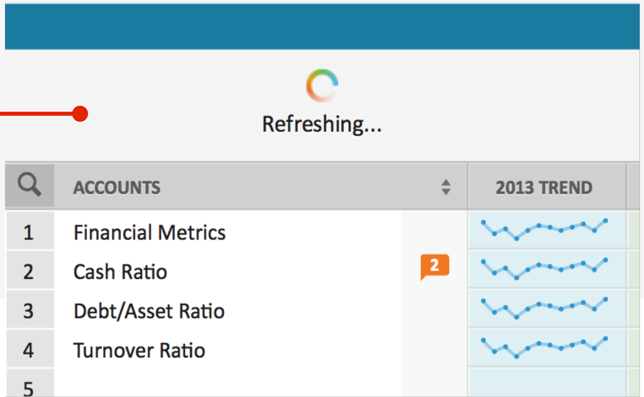
Double tap
Select item (f.ex. start editing a cell in sheet). Note: disable the the double-tap to zoom on iOS.



Spread
Zoom into the focused point



Pull to refresh
When a page is at it's top position, user may pull the screen down to refresh it. This would be mostly relevant for sheets. Pulling reveals 100px of blank area with a spinner in the middle.



Refreshing...

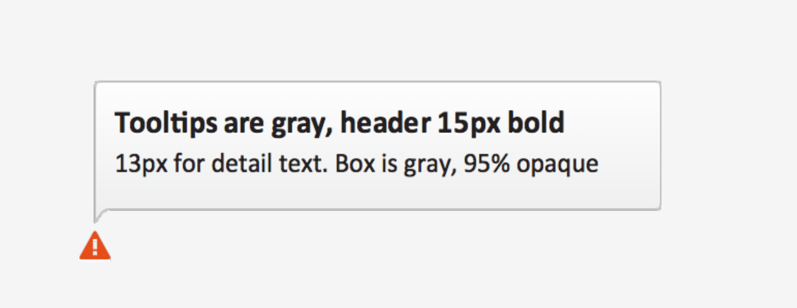
	ACCOUNTS		2013 TREND
1	Financial Metrics		
2	Cash Ratio	2	
3	Debt/Asset Ratio		
4	Turnover Ratio		
5			

Touch UI: No hovers

Approved

In general, hover elements are not supported by touch input so either the hover functionality 1) doesn't exist, 2) is directly accessible by tapping the element, or 3) opens as a menu option next to a focused element. Using a bluetooth mouse or stylus on a touch device will support hover behavior.

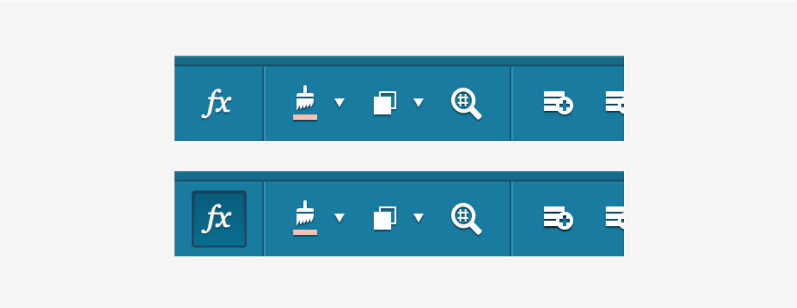
Each UI element would need to be separately considered for this. Here are a few examples.



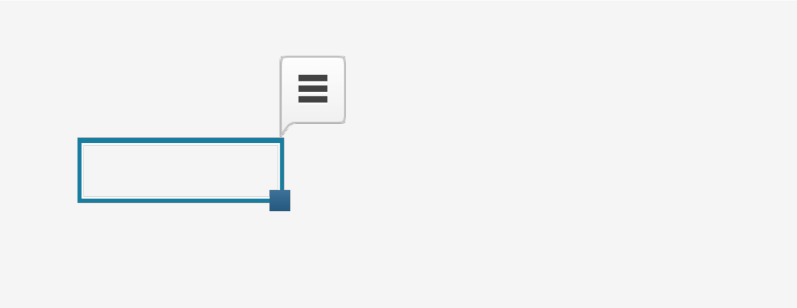
Tooltips are gray, header 15px bold

13px for detail text. Box is gray, 95% opaque

Tooltips: If an element that contains a tooltip is non-functional, the tooltip is opened on tapping the element. Tapping anywhere closes the tooltip. If element is functional, the tooltip is deactivated and tapping it will just execute the function.



Button states: the hover state for the sheet toolbar buttons is not shown. Instead, tapping the item would go directly to the "pressed state" of the the toolbar icons.



Context menus in tables: as right clicking is not supported on touch devices, another direct manipulation method is needed in some cases. For sheets, tapping a cell focuses the cell and brings up a tooltip like menu element that can be tapped to open the context menu.

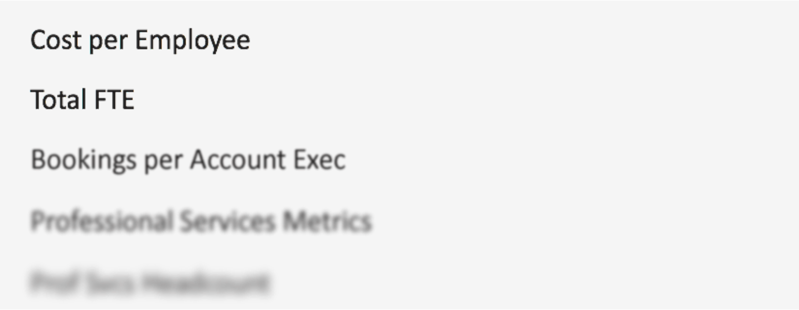
Touch UI: Response time

Approved

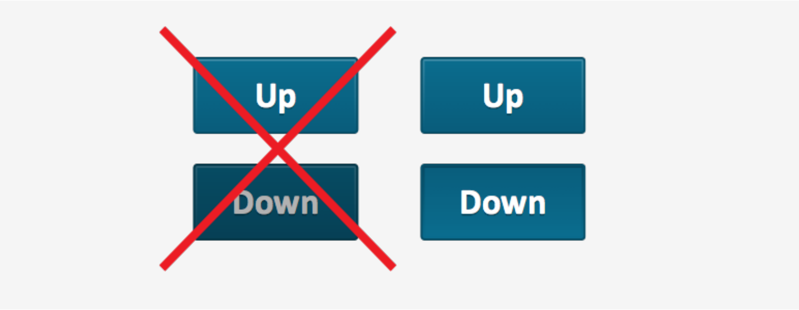
To make the service seem more like a “native” application, even on a tablet web browser, a few tricks should be implemented if feasible.

60fps

Animation: When employing transitions within the UI, they should be at least 60fps (~16ms to complete), which is the iOS standard animation time. This will make the service feel more responsive.


Cost per Employee
Total FTE
Bookings per Account Exec
Professional Services Metrics

Momentum scrolling: when possible, use overflow-scrolling property to make lists and table grid scroll behavior kinetic instead of flat and static. Some browsers do this by default, but not all.



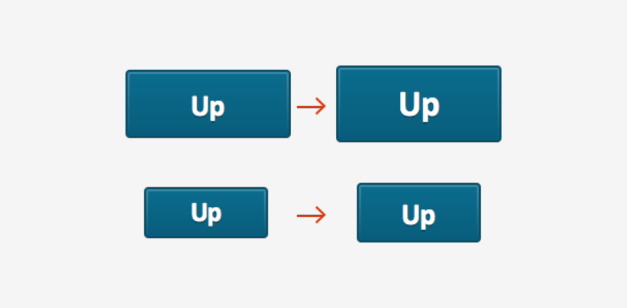
Response time: decrease the button response time. Typically there is a 300ms delay and a default tap highlight in mobile sites, these need to be deactivated with Javascript, and substituted with immediate showing of the pressed down states defined in the spec. This will make the overall system feel a lot more responsive. The actual execution of the action can still be delayed to prevent user error, just animation needs to be immediate.

Basic layout

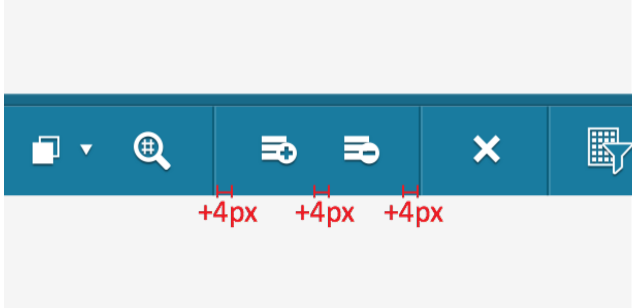
Touch UI: Scaling

✓ Approved

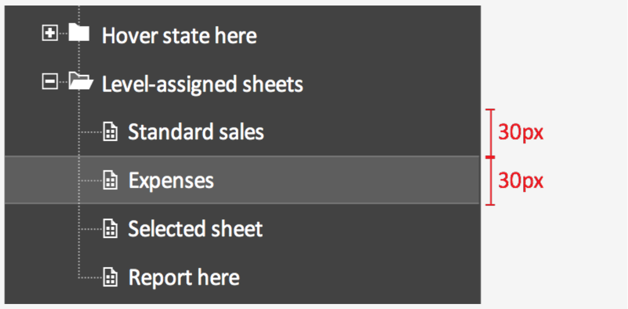
The element sizes within the current designs should be functional without larger changes, but they could be better optimized (especially for smaller devices with high DPI, like iPad Mini). Generally the touch area of an element should be at least 7mm in size (~24px, on 132dpi), with at least 1mm (~4px) in between elements. Measures listed here will help touch usage.



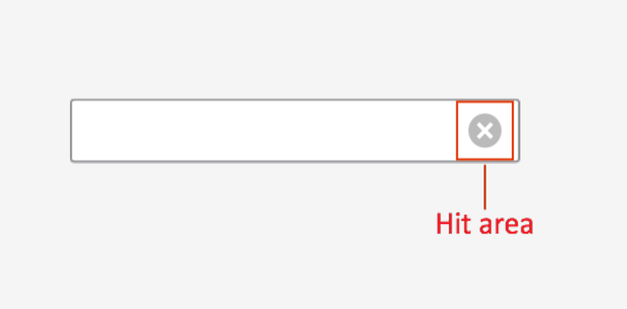
Button sizes: increase button size of “small” buttons (24px) by ~20% (to 28px). Increase the button size of the default buttons by ~15% (to 36px). The sizes should be relative to dpi. The gutters surrounding buttons should also increase with the same 20%.



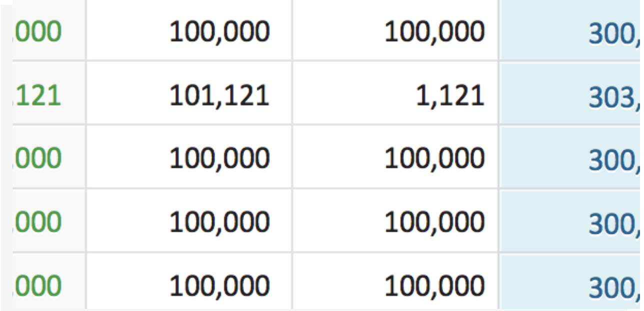
Horizontal gutters in toolbars: double the gutter size between toolbar icons in the sheet toolbar element to prevent user error of tapping the wrong items. Also double the gutter between the two-state button arrow and icon .



Lists: All lists, context menus and overlays should default to 30px leading on tablets instead of the 24px, which is the specified height of some tree hierarchy lists (most notably the 2nd tier navigation) within this document.



Increase hit area beyond the icon when room allows: the hit area of elements should be large enough to act on, even though some elements are relatively small visually. Icons should have a container of no less than 32x32px that reacts to tapping.



000	100,000	100,000	300,
121	101,121	1,121	303,
000	100,000	100,000	300,
000	100,000	100,000	300,
000	100,000	100,000	300,

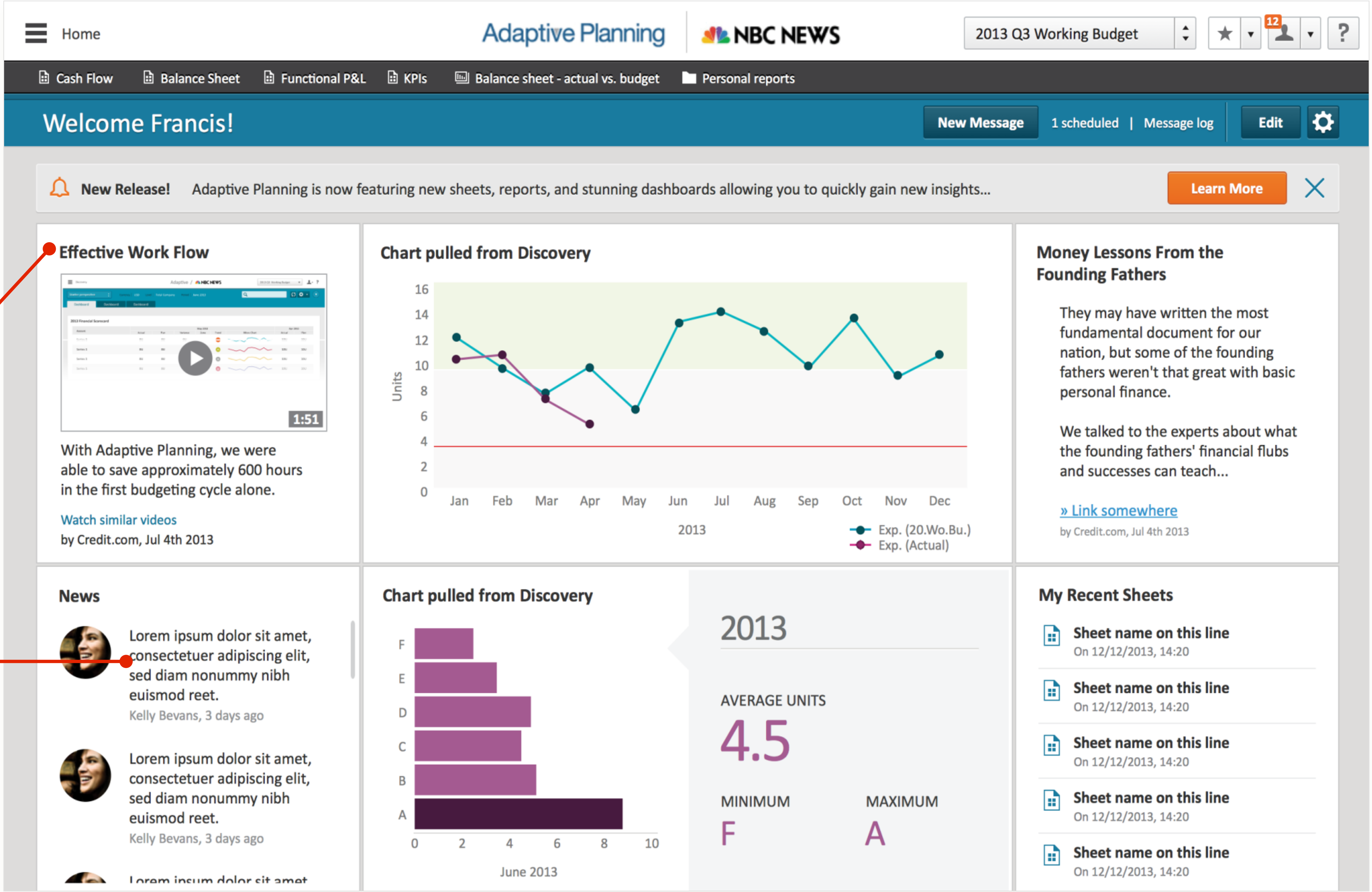
Default to 30px grid in sheets and reports: in sheets, use the largest cell size by default.

Main Structure

Main Structure

Dashboard

Approved


Home
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
New Message
1 scheduled | Message log
Edit
Learn More
1:51
16
14
12
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
Exp. (Actual)
F
E
D
C
B
A
0
2
4
6
8
10
June 2013

Welcome Francis!

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing you to quickly gain new insights...

Effective Work Flow

With Adaptive Planning, we were able to save approximately 600 hours in the first budgeting cycle alone.

Watch similar videos

by Credit.com, Jul 4th 2013

Chart pulled from Discovery

Money Lessons From the Founding Fathers

They may have written the most fundamental document for our nation, but some of the founding fathers weren't that great with basic personal finance.

We talked to the experts about what the founding fathers' financial flubs and successes can teach...

» Link somewhere

by Credit.com, Jul 4th 2013

News

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.

Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.

Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet

Chart pulled from Discovery

2013

AVERAGE UNITS

4.5

MINIMUM	MAXIMUM
F	A

My Recent Sheets

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

48px

Alert height 40px

Heading #3

Dial height 310px

Padding3 px

Text Calibri 13pt

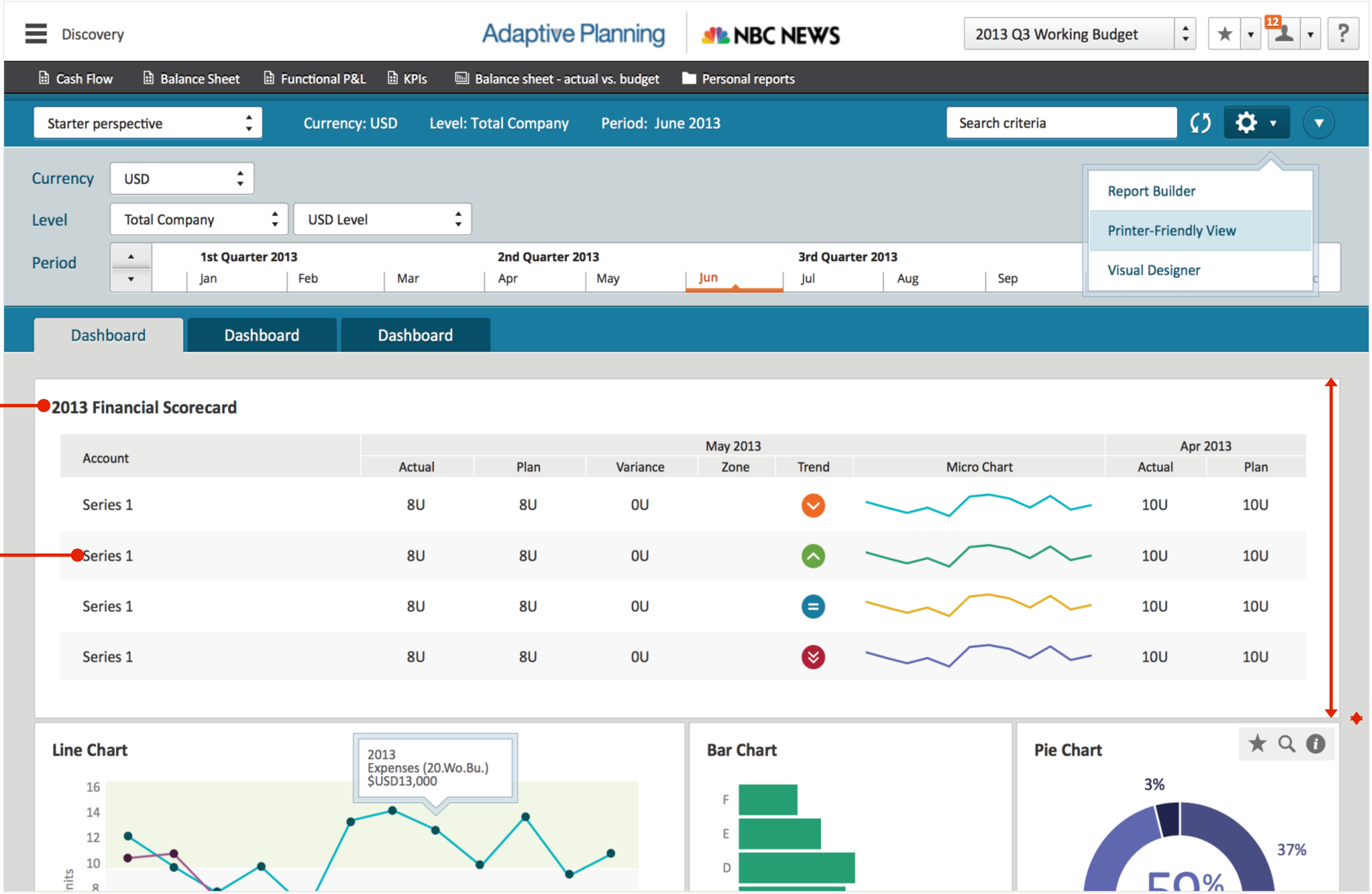
Single column width 304px

Margin 3px

Main Structure

Discovery

Approved



Discovery
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
Search criteria
Report Builder
Printer-Friendly View
Visual Designer
1st Quarter 2013
2nd Quarter 2013
3rd Quarter 2013
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Dashboard
Dashboard
Dashboard
Line Chart
16
14
12
10
8
nits
Bar Chart
F
E
D
Pie Chart
3%
37%
50%

Starter perspective

Currency: USD Level: Total Company Period: June 2013

Currency: USD

Level: Total Company, USD Level

Period: Jun

2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U		▼		10U	10U
Series 1	8U	8U	0U		▲		10U	10U
Series 1	8U	8U	0U		=		10U	10U
Series 1	8U	8U	0U		▼▼		10U	10U

2013
Expenses (20.Wo.Bu.)
$USD13,000

48px

144px

42px

Heading
Calibri Bold
17pt

Text
Calibri
15pt

Dial height
310px

Padding
3px

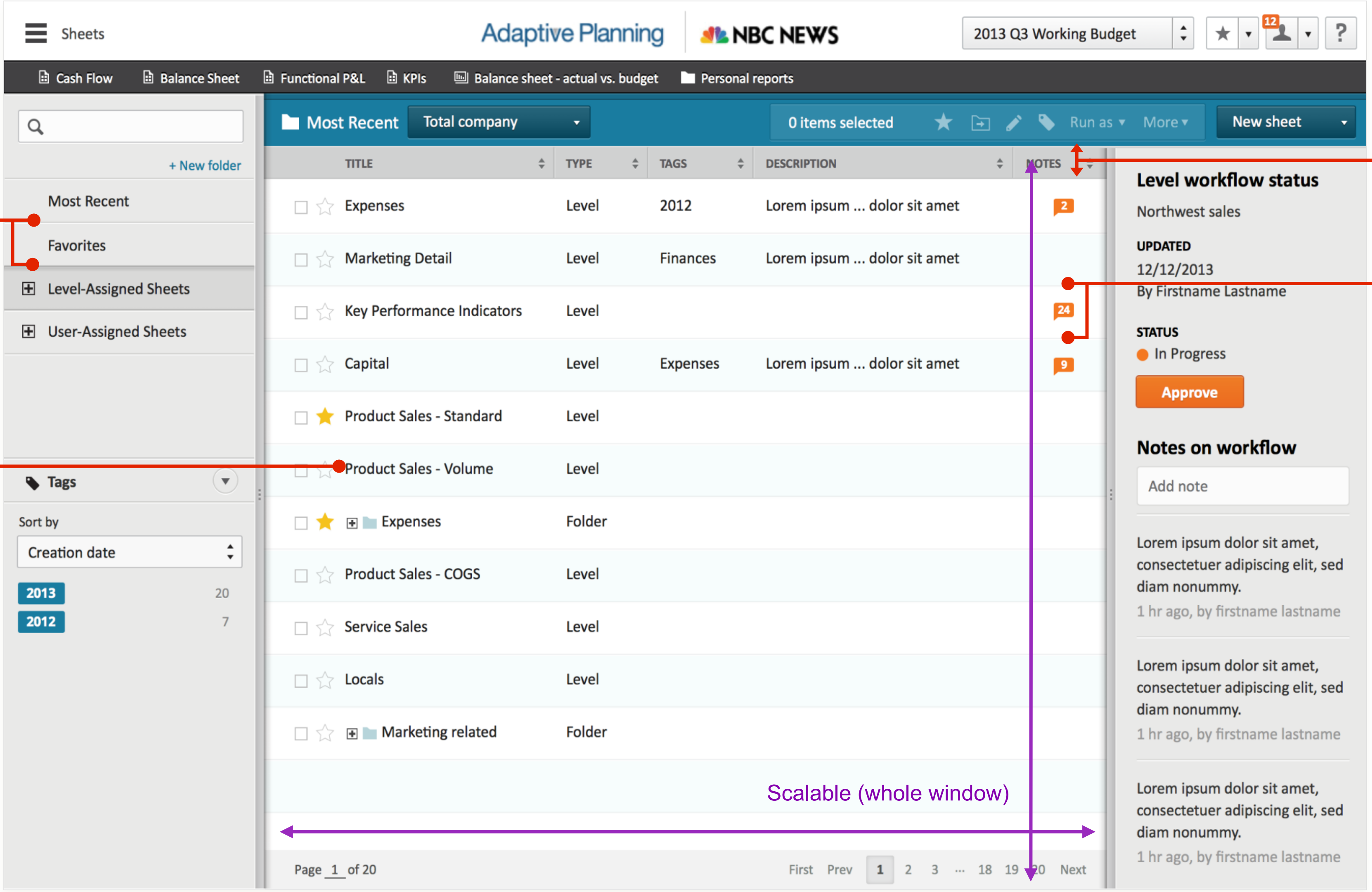
Single column width 304px

Margin 3px

Main Structure

Sheets Overview

Approved


Sheets
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
+ New folder
Most Recent
Favorites
Level-Assigned Sheets
User-Assigned Sheets
Tags
Sort by
Creation date
2013 20
2012 7
Most Recent
Total company
0 items selected
Run as
More
New sheet
Page 1 of 20
First Prev 1 2 3 ... 18 19 20 Next
Approve
Add note

	TITLE	TYPE	TAGS	DESCRIPTION	NOTES
☐ ☆	Expenses	Level	2012	Lorem ipsum ... dolor sit amet	2
☐ ☆	Marketing Detail	Level	Finances	Lorem ipsum ... dolor sit amet	
☐ ☆	Key Performance Indicators	Level			24
☐ ☆	Capital	Level	Expenses	Lorem ipsum ... dolor sit amet	9
☐ ★	Product Sales - Standard	Level			
☐ ☆	Product Sales - Volume	Level			
☐ ★	⊞ Expenses	Folder			
☐ ☆	Product Sales - COGS	Level			
☐ ☆	Service Sales	Level			
☐ ☆	Locals	Level			
☐ ☆	⊞ Marketing related	Folder			

Level workflow status

Northwest sales

UPDATED

12/12/2013

By Firstname Lastname

STATUS

● In Progress

Notes on workflow

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy.

1 hr ago, by firstname lastname

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy.

1 hr ago, by firstname lastname

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy.

1 hr ago, by firstname lastname

Cell height 40px

Text Calibri 15pt

48px

30px

Row height 48px

Scalable (whole window)

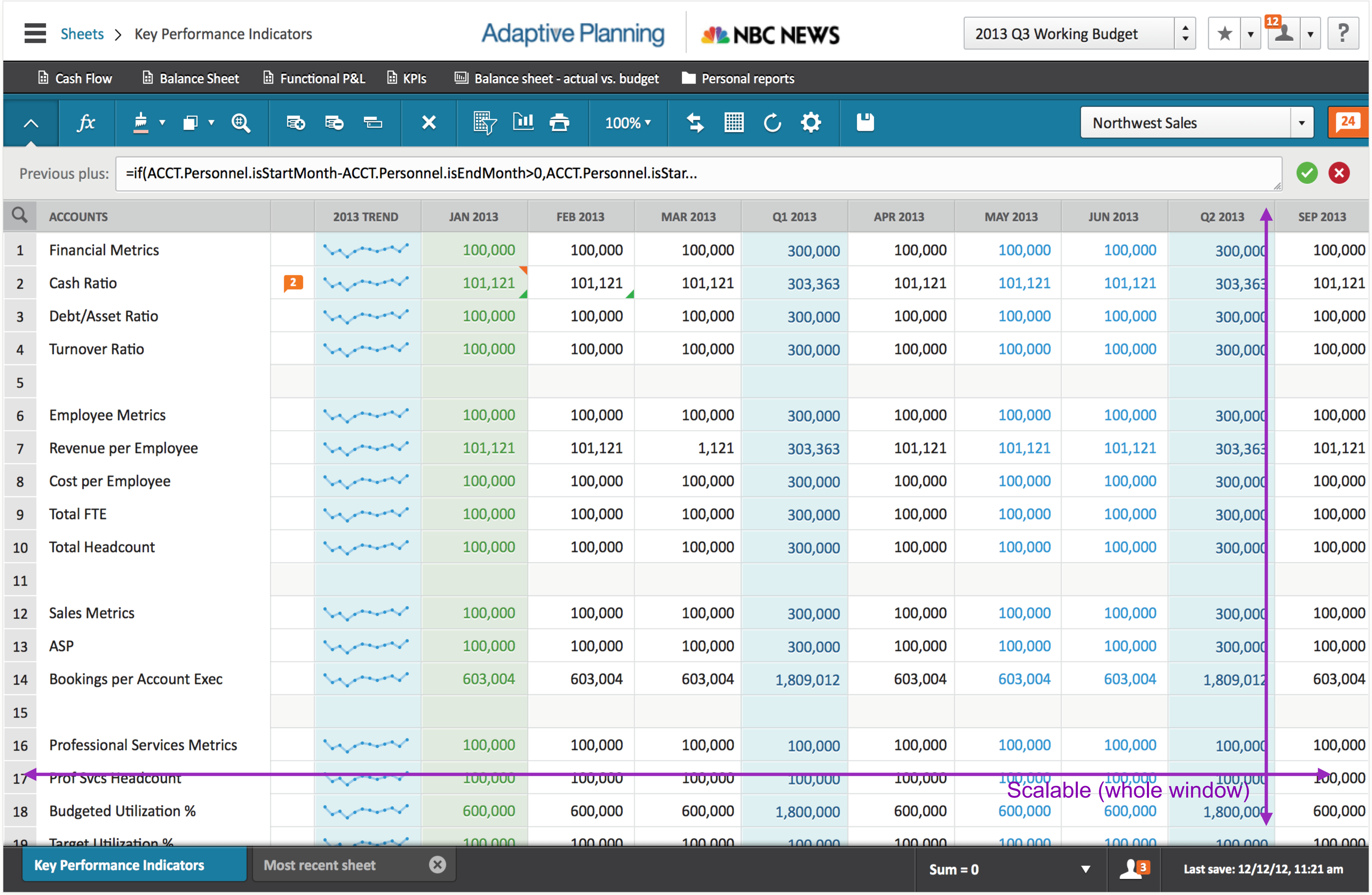
Resizable section; default column width 240px

Resizable section; default column width 240px

Main Structure

Sheets

✓ Approved



☰ Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
★
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100% ▾
Northwest Sales
24
Key Performance Indicators
Most recent sheet
Sum = 0
3
Last save: 12/12/12, 11:21 am

Previous plus: =if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

	ACCOUNTS		2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	SEP 2013
1	Financial Metrics			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
2	Cash Ratio	2		101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363	101,121
3	Debt/Asset Ratio			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
4	Turnover Ratio			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
5												
6	Employee Metrics			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
7	Revenue per Employee			101,121	101,121	1,121	303,363	101,121	101,121	101,121	303,363	101,121
8	Cost per Employee			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
9	Total FTE			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
10	Total Headcount			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
11												
12	Sales Metrics			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
13	ASP			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
14	Bookings per Account Exec			603,004	603,004	603,004	1,809,012	603,004	603,004	603,004	1,809,012	603,004
15												
16	Professional Services Metrics			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
17	Prof Svcs Headcount			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
18	Budgeted Utilization %			600,000	600,000	600,000	1,800,000	600,000	600,000	600,000	1,800,000	600,000
19	Target Utilization %			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000

Scalable (whole window)

48px

48px

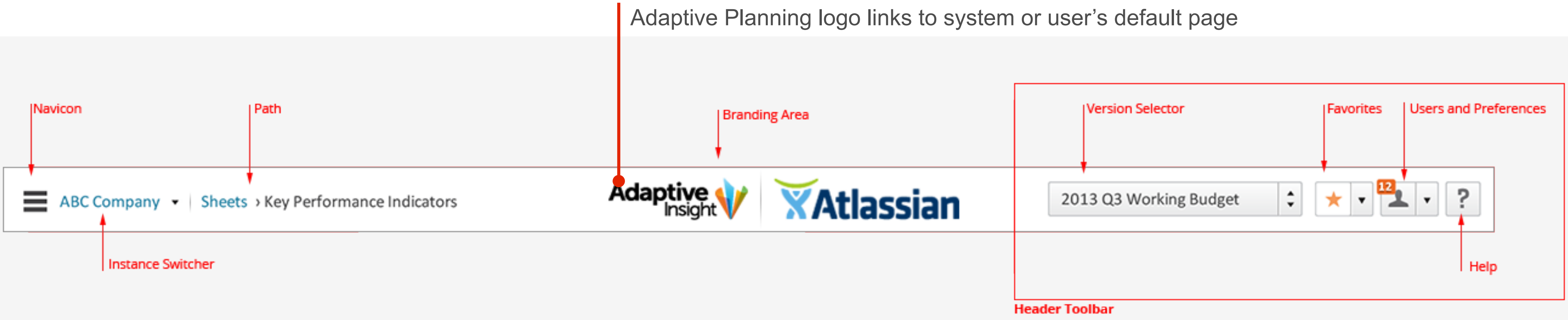
42px

Navigation

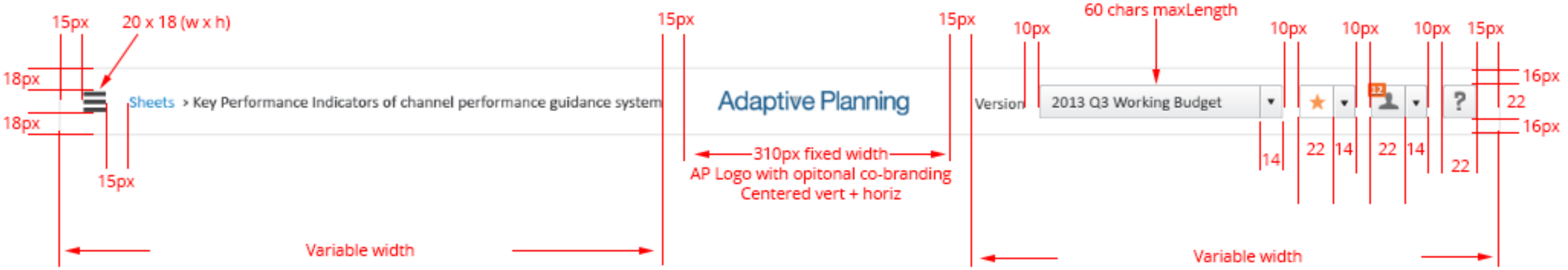
Navigation

Navigation bar

Approved


Adaptive Planning logo links to system or user's default page

Navicon
Path
Branding Area
Version Selector
Favorites
Users and Preferences
ABC Company
Sheets › Key Performance Indicators
Adaptive Insight
Atlassian
2013 Q3 Working Budget
12
?
Instance Switcher
Help
Header Toolbar

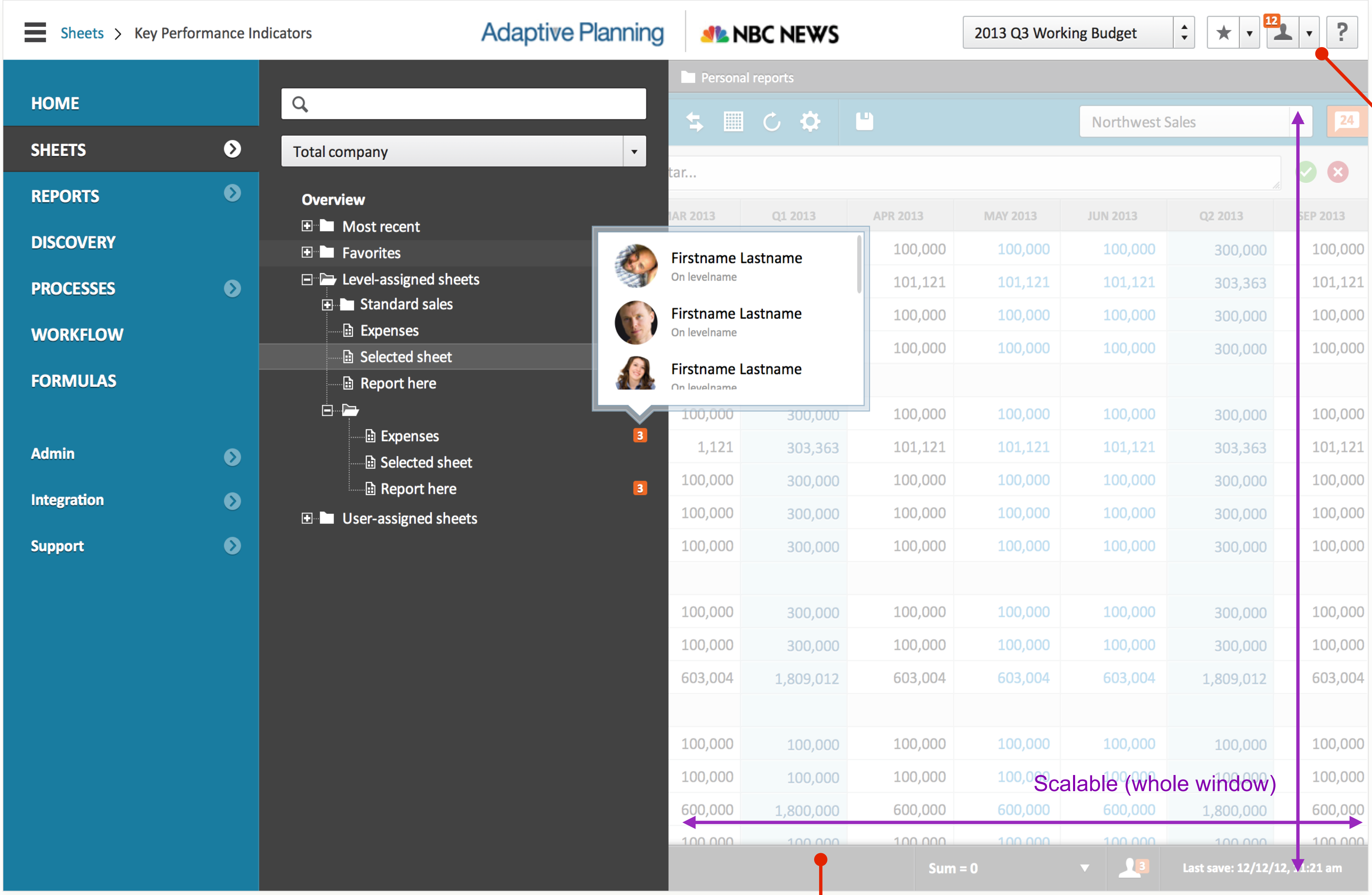

15px
20 x 18 (w x h)
15px
15px
10px
60 chars maxLength
10px
10px
10px
15px
18px
18px
Sheets › Key Performance Indicators of channel performance guidance system
Adaptive Planning
Version
2013 Q3 Working Budget
12
?
16px
22
16px
15px
310px fixed width
AP Logo with opitonal co-branding
Centered vert + horiz
14
22
14
22
14
22
Variable width
Variable width

Breadcrum Color and font size: 15pt #2193d0 › Key Performance Indicators 15 pt #131313
Version selector color and font size: 15pt #131313

See Full Header Spec: http://pm-srv01/mockups/standards/files/approved/header.doc

Navigation open state

Approved


Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
HOME
SHEETS
REPORTS
DISCOVERY
PROCESSES
WORKFLOW
FORMULAS
Admin
Integration
Support
Total company
Overview
Most recent
Favorites
Level-assigned sheets
Standard sales
Expenses
Selected sheet
Report here
Expenses
Selected sheet
Report here
User-assigned sheets
3
3
Firstname Lastname
On levelname
Firstname Lastname
On levelname
Firstname Lastname
On levelname
Personal reports
Northwest Sales
24
tar...
AR 2013
Q1 2013
APR 2013
MAY 2013
JUN 2013
Q2 2013
SEP 2013
Sum = 0
3
Last save: 12/12/12, 11:21 am

AR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	SEP 2013
		100,000	100,000	100,000	300,000	100,000
		101,121	101,121	101,121	303,363	101,121
		100,000	100,000	100,000	300,000	100,000
		100,000	100,000	100,000	300,000	100,000
100,000	300,000	100,000	100,000	100,000	300,000	100,000
1,121	303,363	101,121	101,121	101,121	303,363	101,121
100,000	300,000	100,000	100,000	100,000	300,000	100,000
100,000	300,000	100,000	100,000	100,000	300,000	100,000
100,000	300,000	100,000	100,000	100,000	300,000	100,000
100,000	300,000	100,000	100,000	100,000	300,000	100,000
100,000	300,000	100,000	100,000	100,000	300,000	100,000
603,004	1,809,012	603,004	603,004	603,004	1,809,012	603,004
100,000	100,000	100,000	100,000	100,000	100,000	100,000
100,000	100,000	100,000	100,000	100,000	100,000	100,000
600,000	1,800,000	600,000	600,000	600,000	1,800,000	600,000

Navigation height scales with the page

Header area is functional while navigation is open. Opening a menu would force the navigation to close though.

Scalable (whole window)

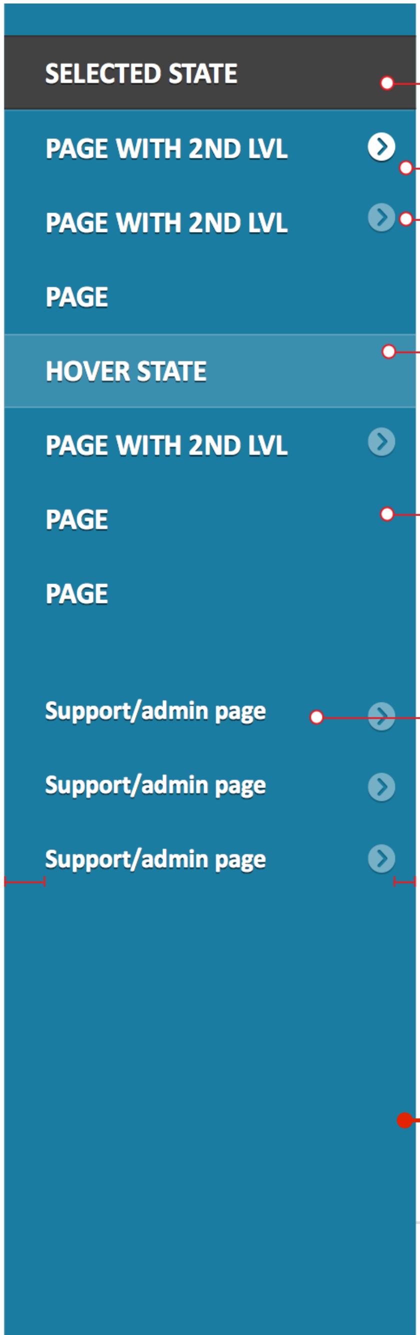
Fixed width 240px

Fixed width 380px

Smokescreen 70% opaque, #FFFFFF, Clicking here closes the navigation.

Navigation 1st level

Approved


SELECTED STATE
PAGE WITH 2ND LVL
PAGE WITH 2ND LVL
PAGE
HOVER STATE
PAGE WITH 2ND LVL
PAGE
PAGE
Support/admin page
Support/admin page
Support/admin page

18px

#424242
1px stroke, #343433
Drop shadow 1px #FFFFFF, 15% opaque

Hover/selected state

Up state, 40% opaque

42px

#FFFFFF 15% opaque
1px stroke, 30% opaque

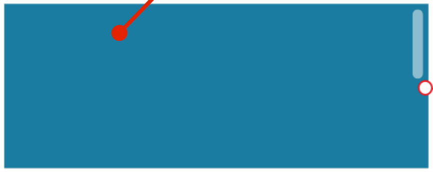
Text is 1.063em, Bold, Uppercase
1px drop shadow 50% opaque, #000000,

Text is 0.938em, Bold
1px drop shadow 50% opaque, #000000,

24px

12px

If the items do not fit into the height of the screen, use independent scrollbars for each navigation level. When menu is opened, it is automatically positioned on top.



Scrollbar
6px wide, rounded corners 3px radius
#FFFFFF 50% opaque

Animation and Behavior

1st level
- On hover menu slides out after 200ms delay
- On click menu slides out immediately

2nd level - Slide out
- on hover of secondary nav arrow, slides out immediately
- hover over another arrow and 2nd level content is replaced (no animation)

Dismissing Navigation
- Tap on navicon when menu is open to close immediately (no animation)
- Mouseout of menu and navigation will close after 300ms delay.

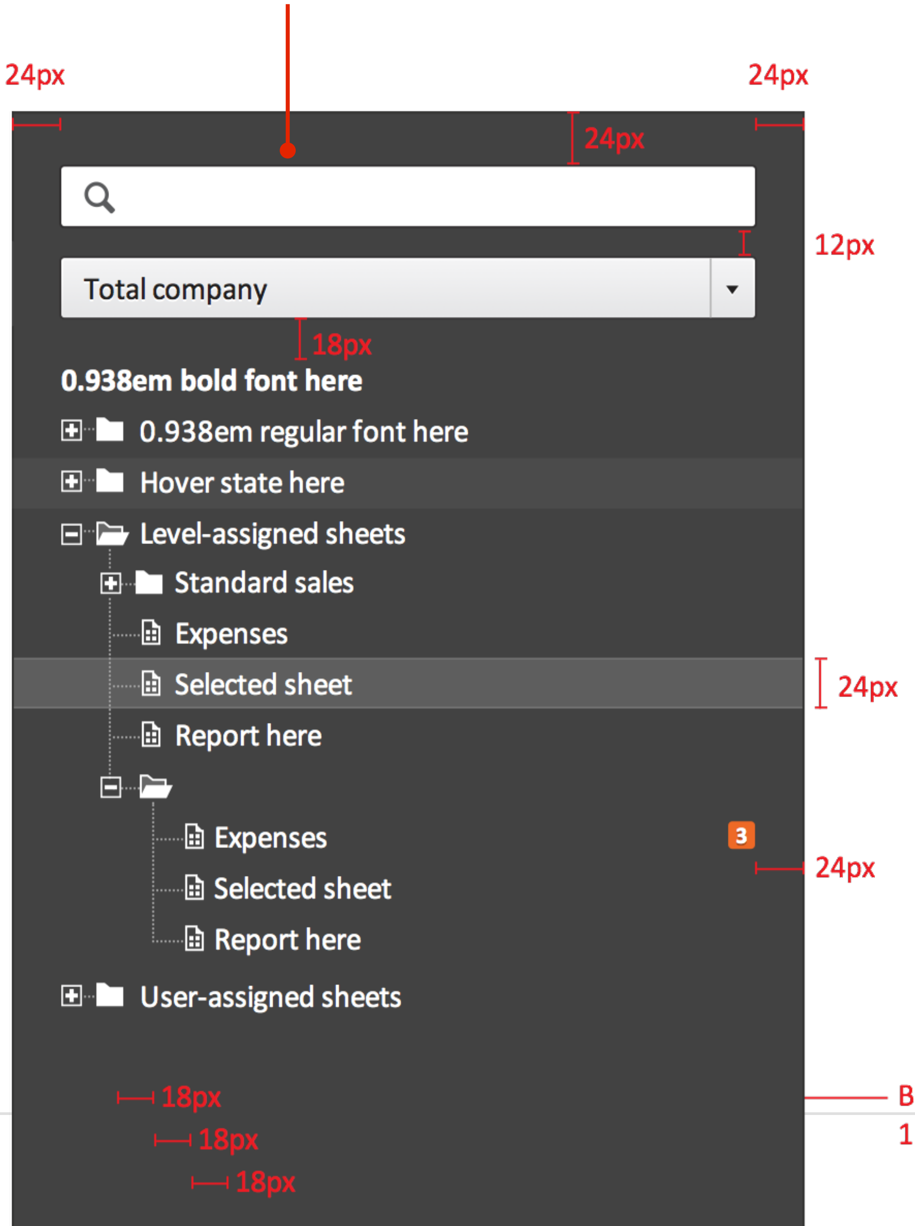
Clicking the arrow opens the 2nd level menu. Clicking the header goes to the page. Clicking the arrow again closes the 2nd level (acts as a toggle).

Navigation

Navigation 2nd level

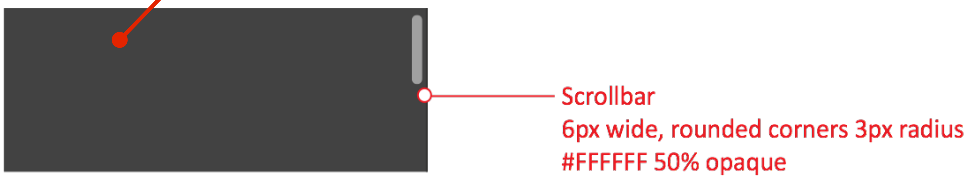
Approved

The state of the navigation trees persist based on earlier use and opened folders. This is independent for each user, not global.


24px
24px
24px
Total company
12px
18px
0.938em bold font here
0.938em regular font here
Hover state here
Level-assigned sheets
Standard sales
Expenses
Selected sheet
24px
Report here
Expenses
3
Selected sheet
24px
Report here
User-assigned sheets
18px
18px
18px

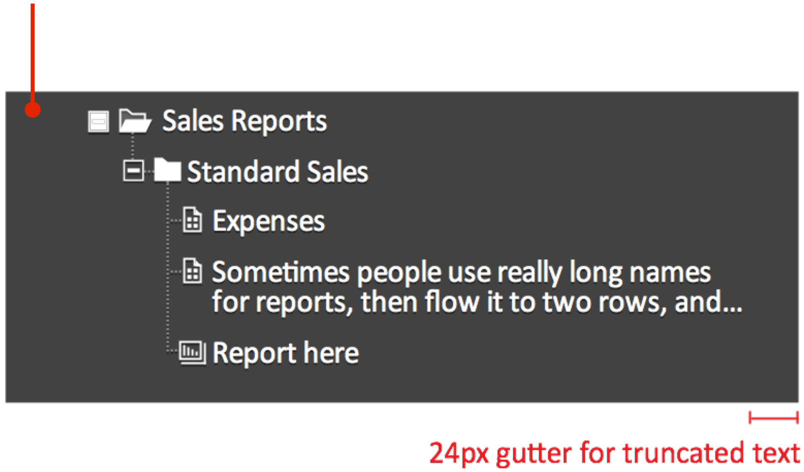
Background #424242
1px Outer stroke #343433

If the items do not fit into the height of the screen, use independent scrollbars for each navigation level. When menu is opened, it is automatically positioned on top.



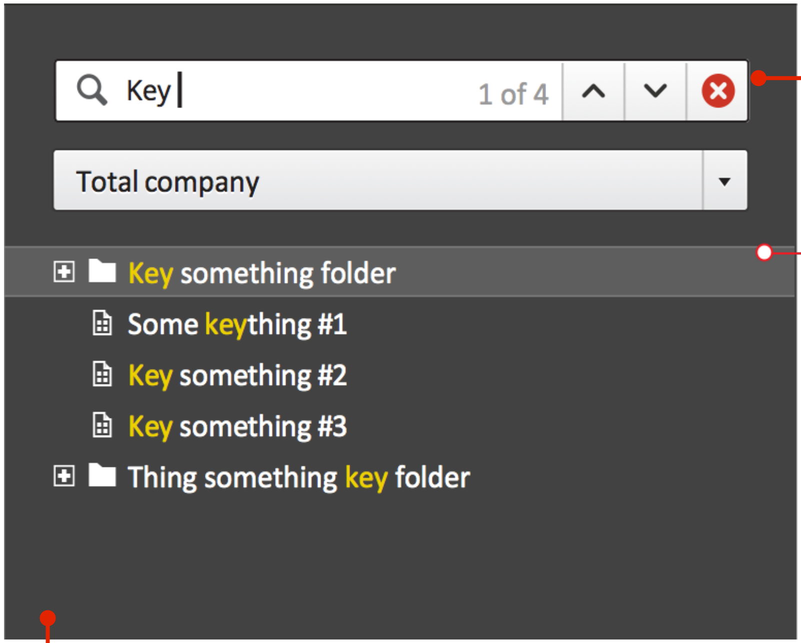
Scrollbar
6px wide, rounded corners 3px radius
#FFFFFF 50% opaque

Truncation Rule
Flow to two rows with long names, truncate with ellipses after that. Leading 0.938em


Sales Reports
Standard Sales
Expenses
Sometimes people use really long names for reports, then flow it to two rows, and...
Report here
24px gutter for truncated text

Navigation 2nd level: search & tooltip

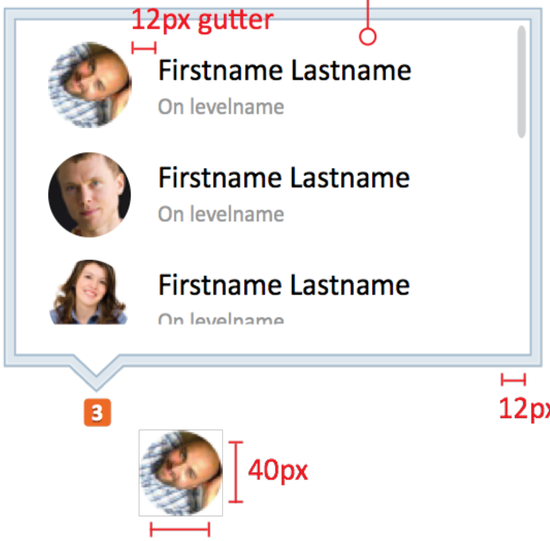
Approved


Key
1 of 4
Total company
Key something folder
Some keything #1
Key something #2
Key something #3
Thing something key folder

Clicking x reverts to previous state of navigation, arrows focus the previous and next result; “1 of 4” changes to “2 of 4” and so on. Matching string is highlighted within the results. Selection cycles from the last to the first. Navigating up and down in the found list will automatically open up the tree level to show the found string.

Highlight on text
#ECD000

Folder search results are closed by default, but can be opened. If a file within a folder and the folder itself both match, both are shown in this view (and the file is repeated in the folder when it’s opened). If the first occurrence is a nested level, that level must be opened by default. Subsequent levels may be collapsed.


Firstname Lastname
On levelname
Firstname Lastname
On levelname
Firstname Lastname
On levelname
3

12px gutter

12px gutter

Title 0.938em regular
Subtitle 0.688em, regular #989898

12px gutter

12px gutter

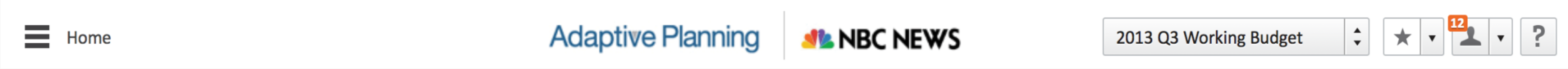
40px

40px

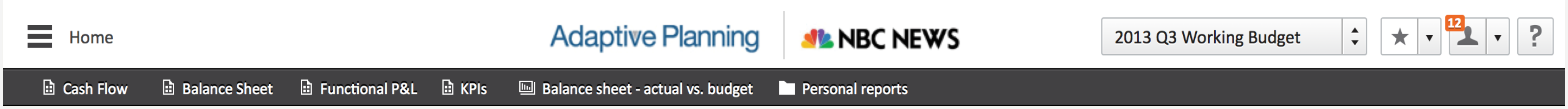
Navigation

Toolbar

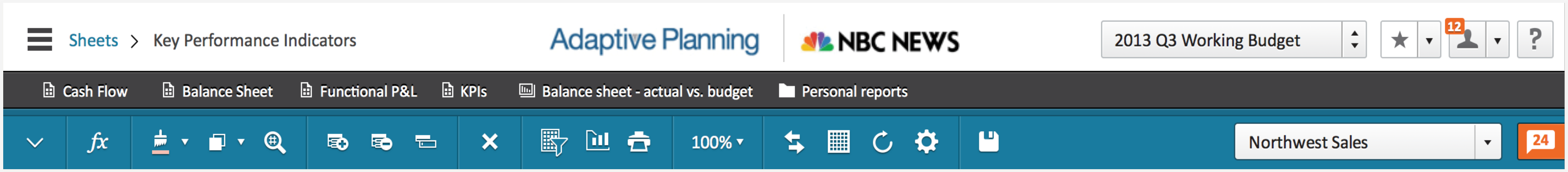
Approved


Home
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?

Menu bar


Home
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports

Menu bar with favorites


Sheets
Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Northwest Sales
24

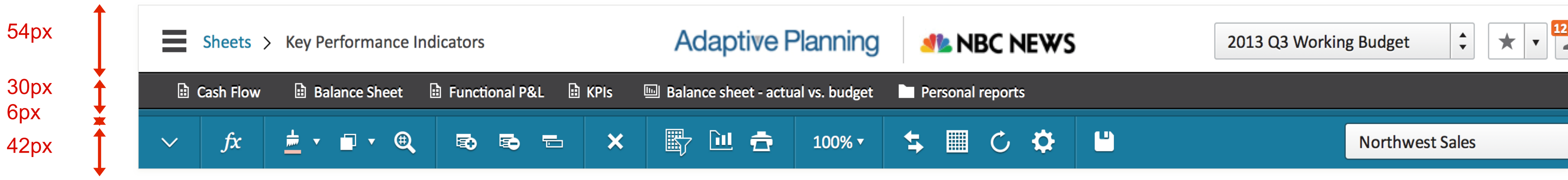
Menu bar with sheets toolbar

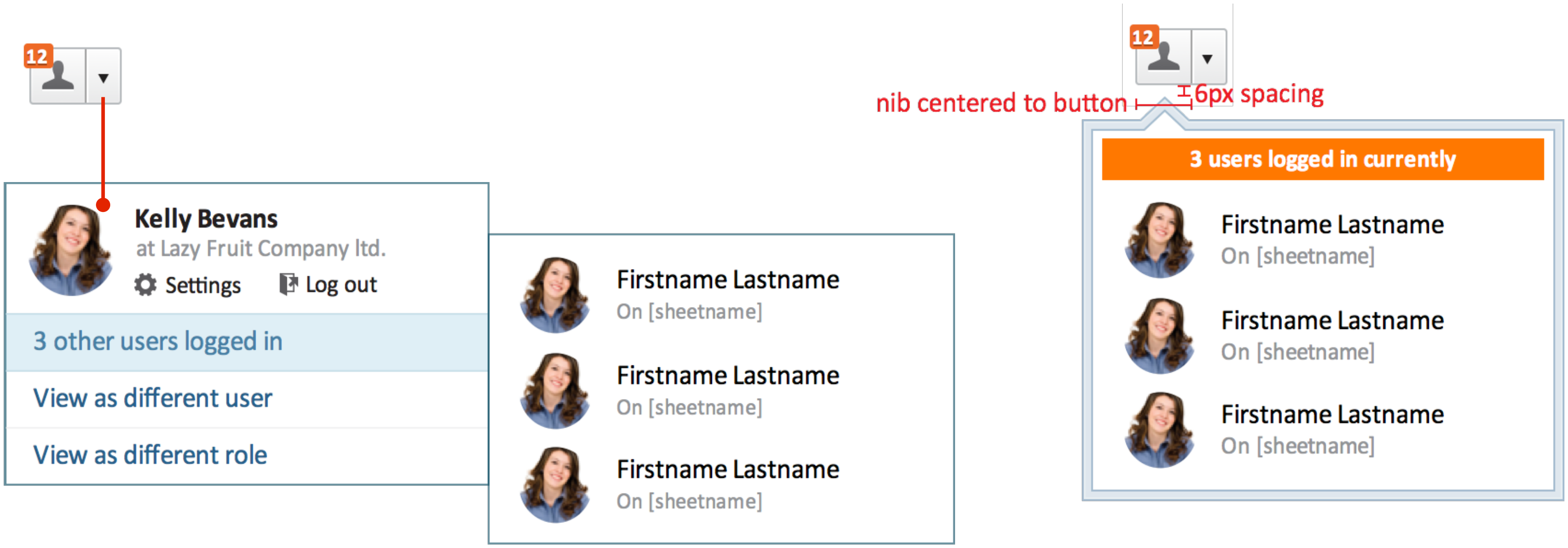
Navigation

Toolbar

Approved

Toolbar height
Height is divisible by 6px; width is equal to window width


54px
30px
6px
42px
Sheets
Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Northwest Sales

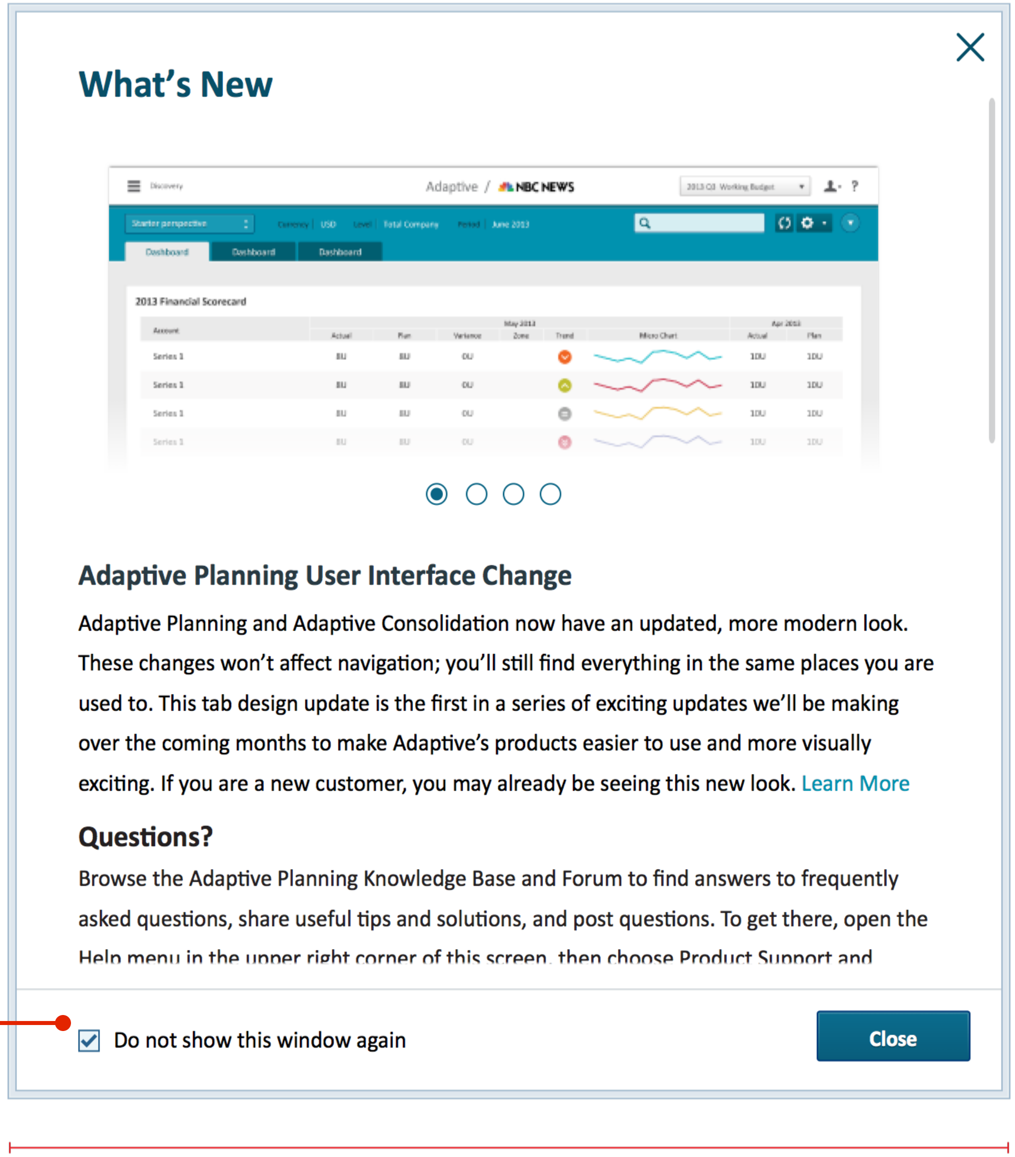

12
Kelly Bevans
at Lazy Fruit Company ltd.
Settings
Log out
3 other users logged in
View as different user
View as different role
Firstname Lastname
On [sheetname]
Firstname Lastname
On [sheetname]
Firstname Lastname
On [sheetname]
12
nib centered to button
6px spacing
3 users logged in currently
Firstname Lastname
On [sheetname]
Firstname Lastname
On [sheetname]
Firstname Lastname
On [sheetname]

Secondary Components

Secondary Components

Modal overview

✓ Approved



What's New

● ○ ○ ○

Adaptive Planning User Interface Change

Adaptive Planning and Adaptive Consolidation now have an updated, more modern look. These changes won't affect navigation; you'll still find everything in the same places you are used to. This tab design update is the first in a series of exciting updates we'll be making over the coming months to make Adaptive's products easier to use and more visually exciting. If you are a new customer, you may already be seeing this new look. Learn More

Questions?

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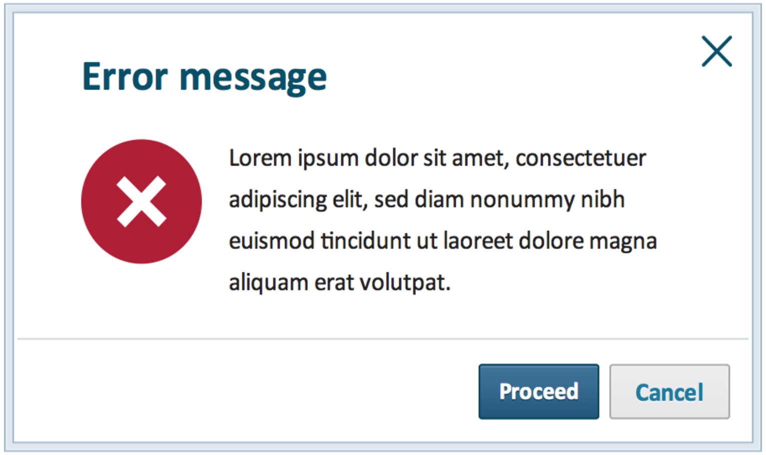
☑ Do not show this window again

Place secondary controls in the footer right edge

650px

Message modals

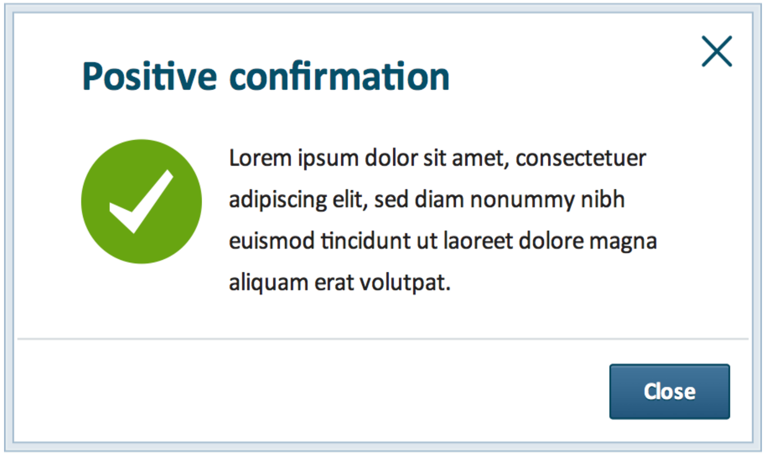
✓ Approved



Error message

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

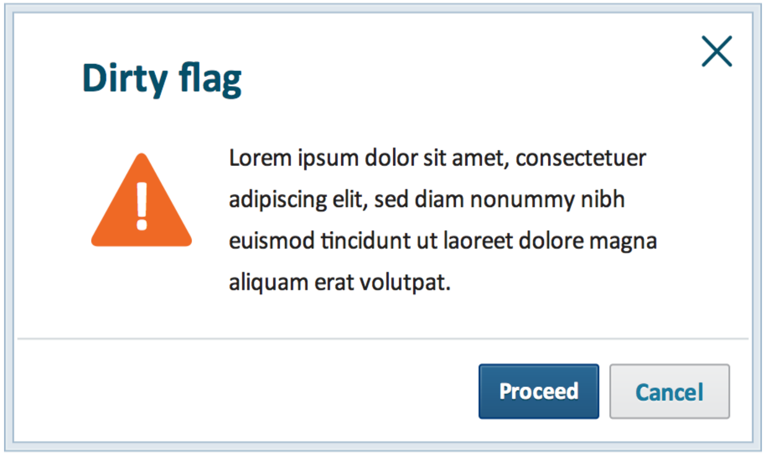
450px



Positive confirmation

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

450px



Dirty flag

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

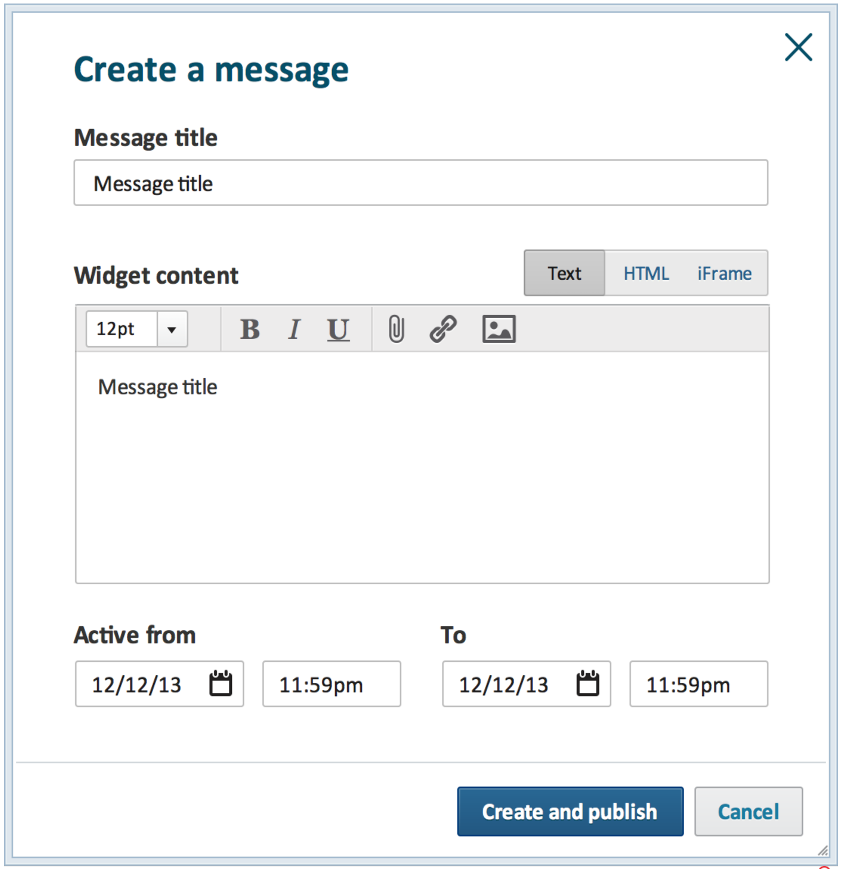
450px

Secondary Components

Forms in modal windows

Adaptive Insight

✓ Approved



Create a message

Message title

Message title

Widget content

Text
HTML
iFrame
12pt
B
I
U

Message title

Active from

12/12/13 11:59pm

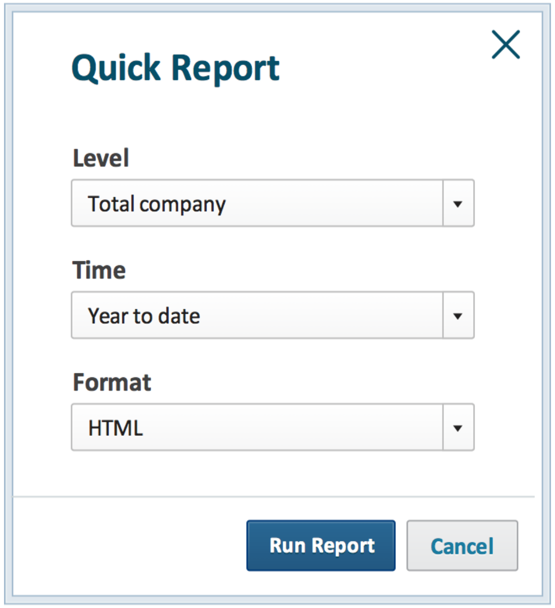
To

12/12/13 11:59pm

Create and publish
Cancel

550px

Optional resize widget



Quick Report

Level

Total company

Time

Year to date

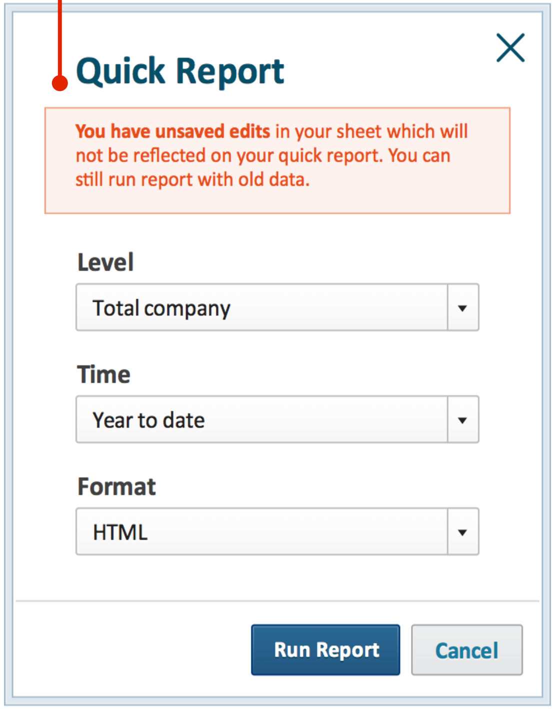
Format

HTML

Run Report
Cancel

350px

Notification within a modal



Quick Report

You have unsaved edits in your sheet which will not be reflected on your quick report. You can still run report with old data.

Level

Total company

Time

Year to date

Format

HTML

Run Report
Cancel

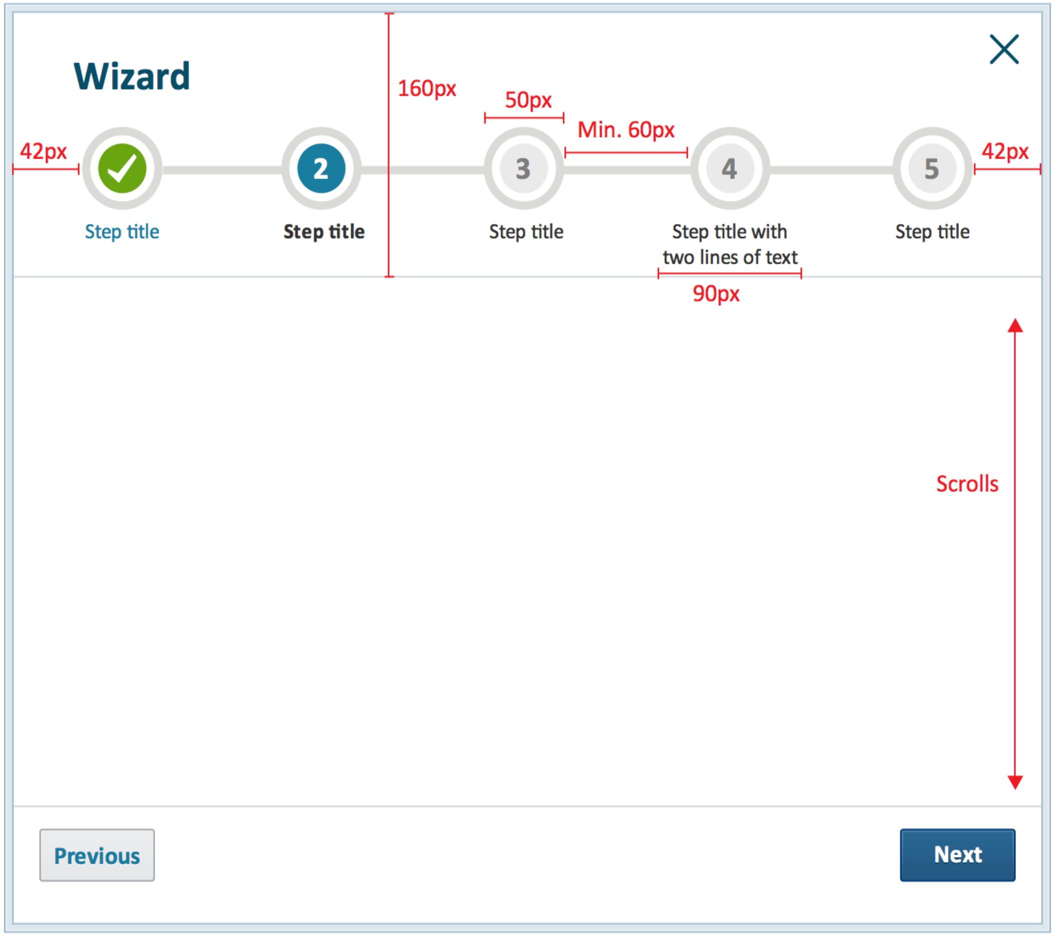
350px

Modal window size should depend on the contents. Minimum width for a modal window is 380px, and scale from there in increments of 100px up. Maximum width is 880px.

Secondary Components

Wizard

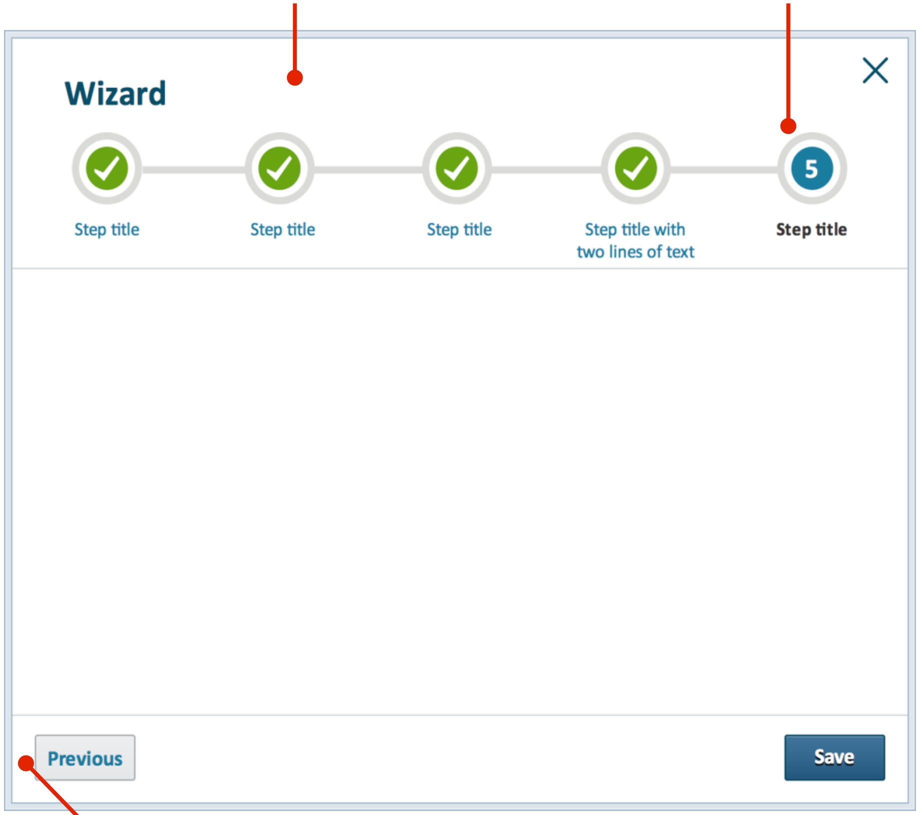
✓ Approved


Wizard
42px
160px
50px
Min. 60px
42px
2
3
4
5
Step title
Step title
Step title
Step title with two lines of text
Step title
90px
Scrolls
Previous
Next

480px - 880px, depending on amount of steps and content (max. 7 steps for 880px)

As steps are completed, change to green checkmark. Navigate back by clicking title.

Currently open, incomplete step.

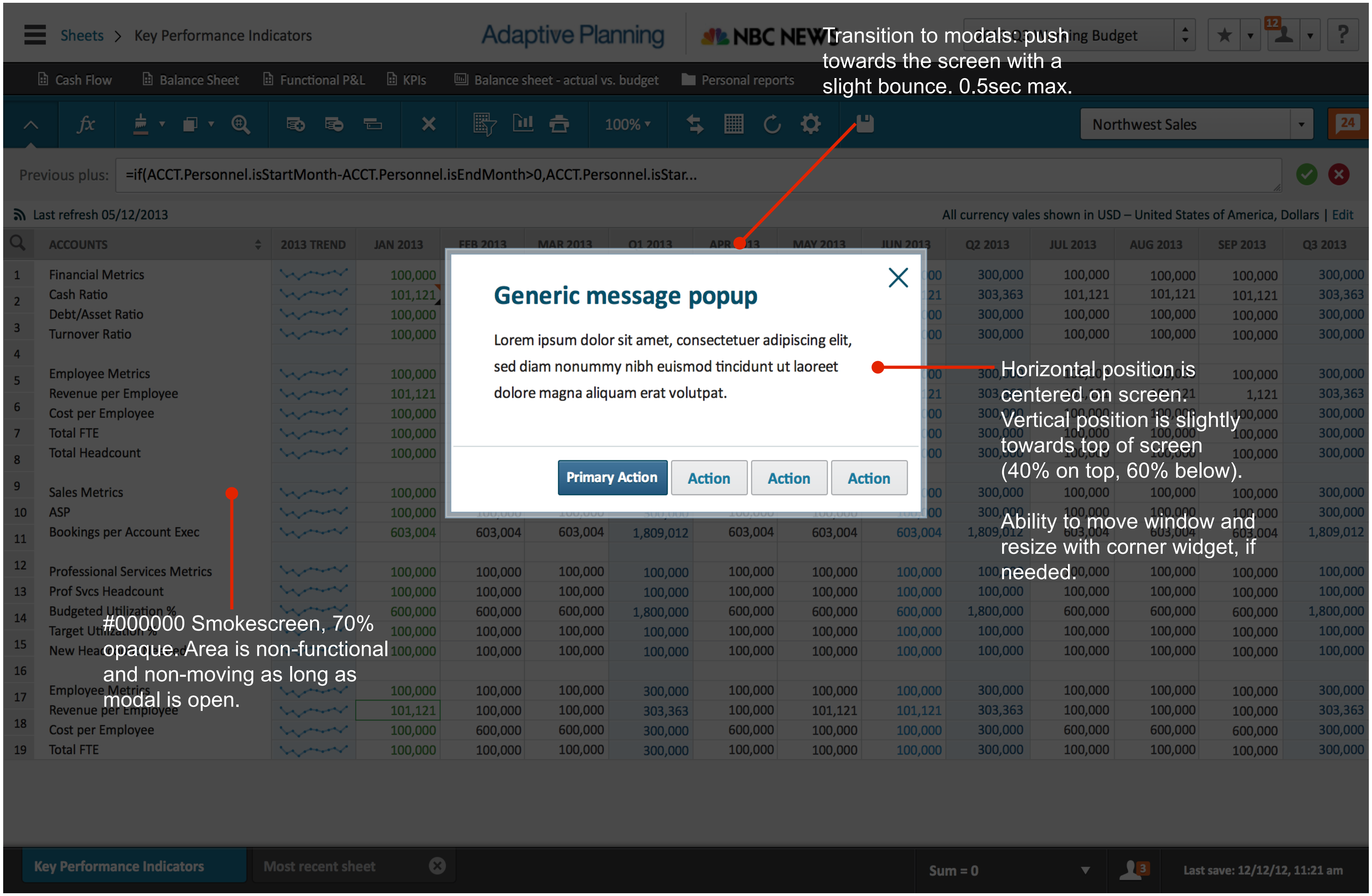

Wizard
5
Step title
Step title
Step title
Step title with two lines of text
Step title
Previous
Save

Wizards can also be used on full page view. Use similar layout, and keep the “next” and “previous” always visible on screen.

Secondary Components

Modal overview

✓ Approved


Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
100%
Northwest Sales
Previous plus:
Last refresh 05/12/2013
All currency vales shown in USD – United States of America, Dollars | Edit
ACCOUNTS
2013 TREND
JAN 2013
FEB 2013
MAR 2013
Q1 2013
APR 2013
MAY 2013
JUN 2013
Q2 2013
JUL 2013
AUG 2013
SEP 2013
Q3 2013
Financial Metrics
Cash Ratio
Debt/Asset Ratio
Turnover Ratio
Employee Metrics
Revenue per Employee
Cost per Employee
Total FTE
Total Headcount
Sales Metrics
ASP
Bookings per Account Exec
Professional Services Metrics
Prof Svcs Headcount
Budgeted Utilization %
Target Utilization %
Employee Metrics
Revenue per Employee
Cost per Employee
Total FTE
Key Performance Indicators
Most recent sheet
Sum = 0
Last save: 12/12/12, 11:21 am
Primary Action
Action
Action
Action

=if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

Generic message popup

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Transition to modals: push towards the screen with a slight bounce. 0.5sec max.

Horizontal position is centered on screen. Vertical position is slightly towards top of screen (40% on top, 60% below).

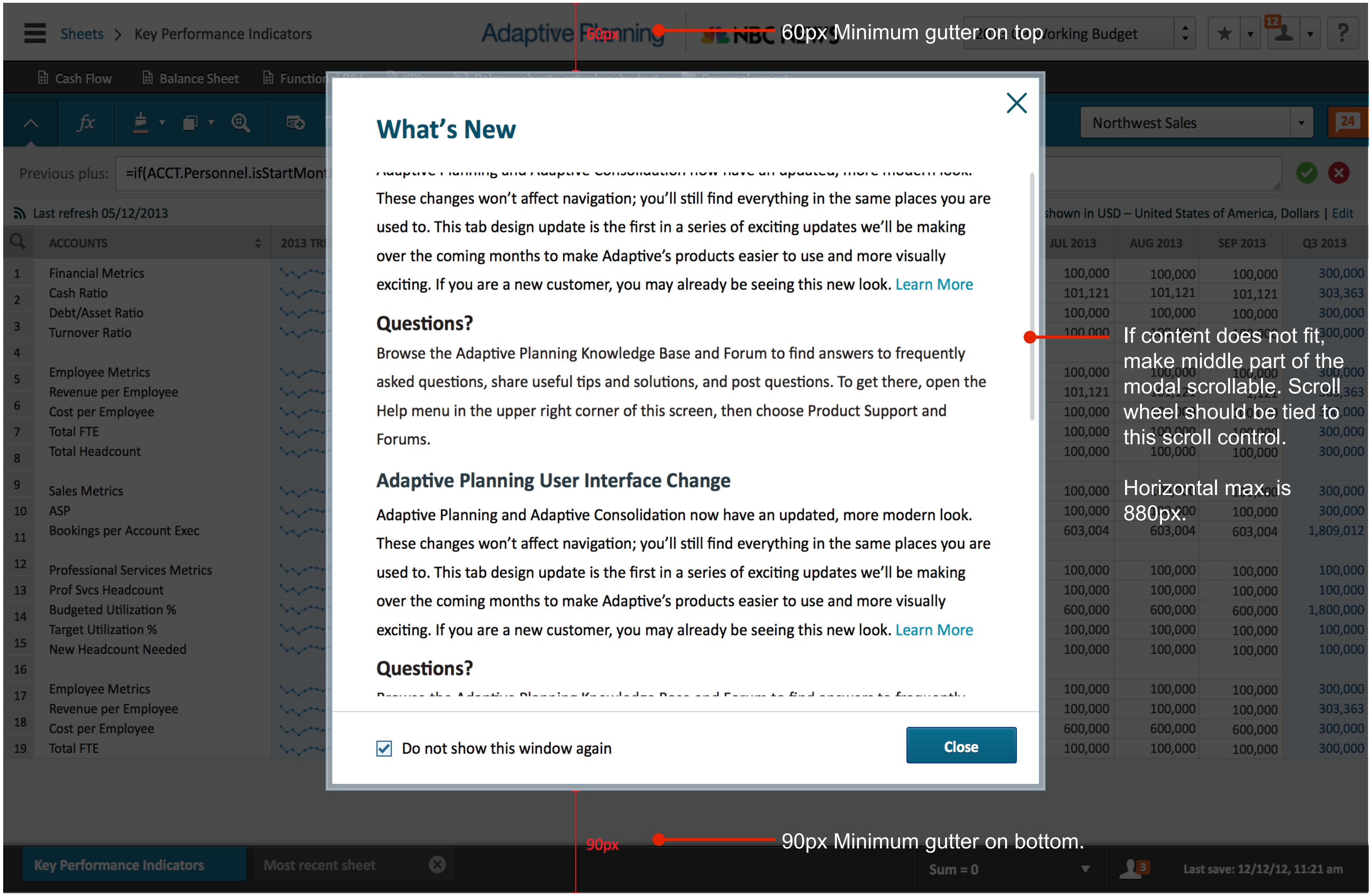
Ability to move window and resize with corner widget, if needed.

#000000 Smokescreen, 70% opaque. Area is non-functional and non-moving as long as modal is open.

Secondary Components

Scrolling and overflow

Approved


Sheets > Key Performance Indicators
Adaptive Planning
Working Budget
Cash Flow
Balance Sheet
Northwest Sales
Previous plus:
=if(ACCT.Personnel.isStartMont
Last refresh 05/12/2013
shown in USD – United States of America, Dollars | Edit
ACCOUNTS
JUL 2013
AUG 2013
SEP 2013
Q3 2013
Financial Metrics
Cash Ratio
Debt/Asset Ratio
Turnover Ratio
Employee Metrics
Revenue per Employee
Cost per Employee
Total FTE
Total Headcount
Sales Metrics
ASP
Bookings per Account Exec
Professional Services Metrics
Prof Svcs Headcount
Budgeted Utilization %
Target Utilization %
New Headcount Needed
Key Performance Indicators
Most recent sheet
Sum = 0
Last save: 12/12/12, 11:21 am
60px
90px

What's New

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Questions?

☑ Do not show this window again

Close

60px Minimum gutter on top

If content does not fit, make middle part of the modal scrollable. Scroll wheel should be tied to this scroll control.

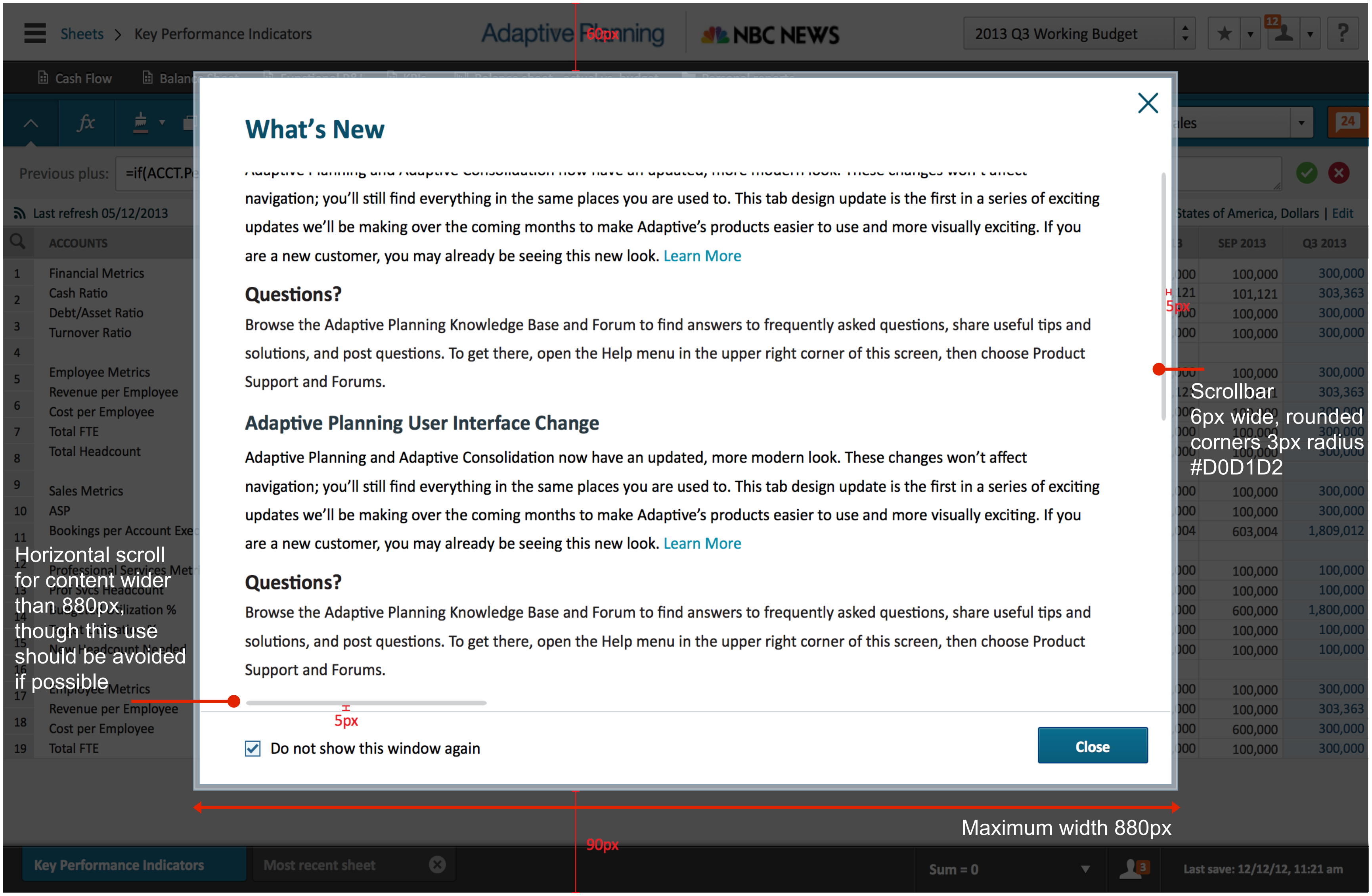
Horizontal max. is 880px.

90px Minimum gutter on bottom.

Secondary Components

Scrolling and overflow

✓ Approved


Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
Cash Flow
Balance Sheet
Previous plus: =if(ACCT.P
Last refresh 05/12/2013
ACCOUNTS
States of America, Dollars | Edit
SEP 2013
Q3 2013
Financial Metrics
Cash Ratio
Debt/Asset Ratio
Turnover Ratio
Employee Metrics
Revenue per Employee
Cost per Employee
Total FTE
Total Headcount
Sales Metrics
ASP
Bookings per Account Exe
Key Performance Indicators
Most recent sheet
Sum = 0
Last save: 12/12/12, 11:21 am
60px
5px
5px
90px

What's New

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☑ Do not show this window again

Close

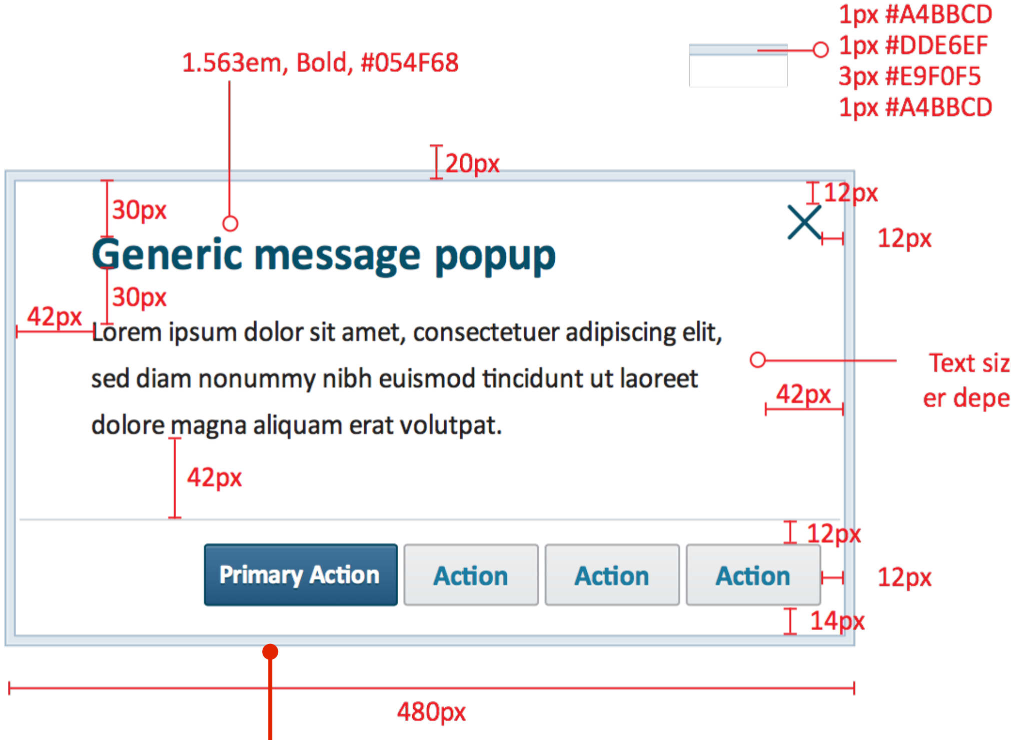
Scrollbar
6px wide, rounded corners 3px radius
#D0D1D2

Horizontal scroll for content wider than 880px, though this use should be avoided if possible

Maximum width 880px

Modal dimensions

✓ Approved


1.563em, Bold, #054F68
1px #A4BBCD
1px #DDE6EF
3px #E9F0F5
1px #A4BBCD
20px
30px
12px
12px
30px
42px
42px
42px
12px
12px
14px
480px
Primary Action
Action
Action
Action

Generic message popup

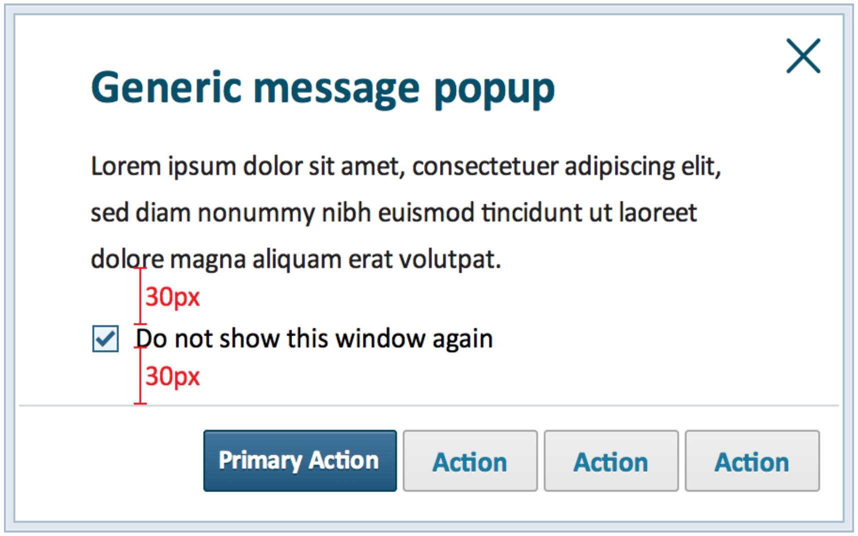
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

✕ Up, 074F68

✕ Hover, #187C9F

Text size 0.936em, this can be smaller depending on contents

Primary action button goes to right side, and is colored blue. If action is destructive, use orange instead. All secondary action buttons should be grey, and the most relevant ones should be on right.


30px
30px
Primary Action
Action
Action
Action

Generic message popup

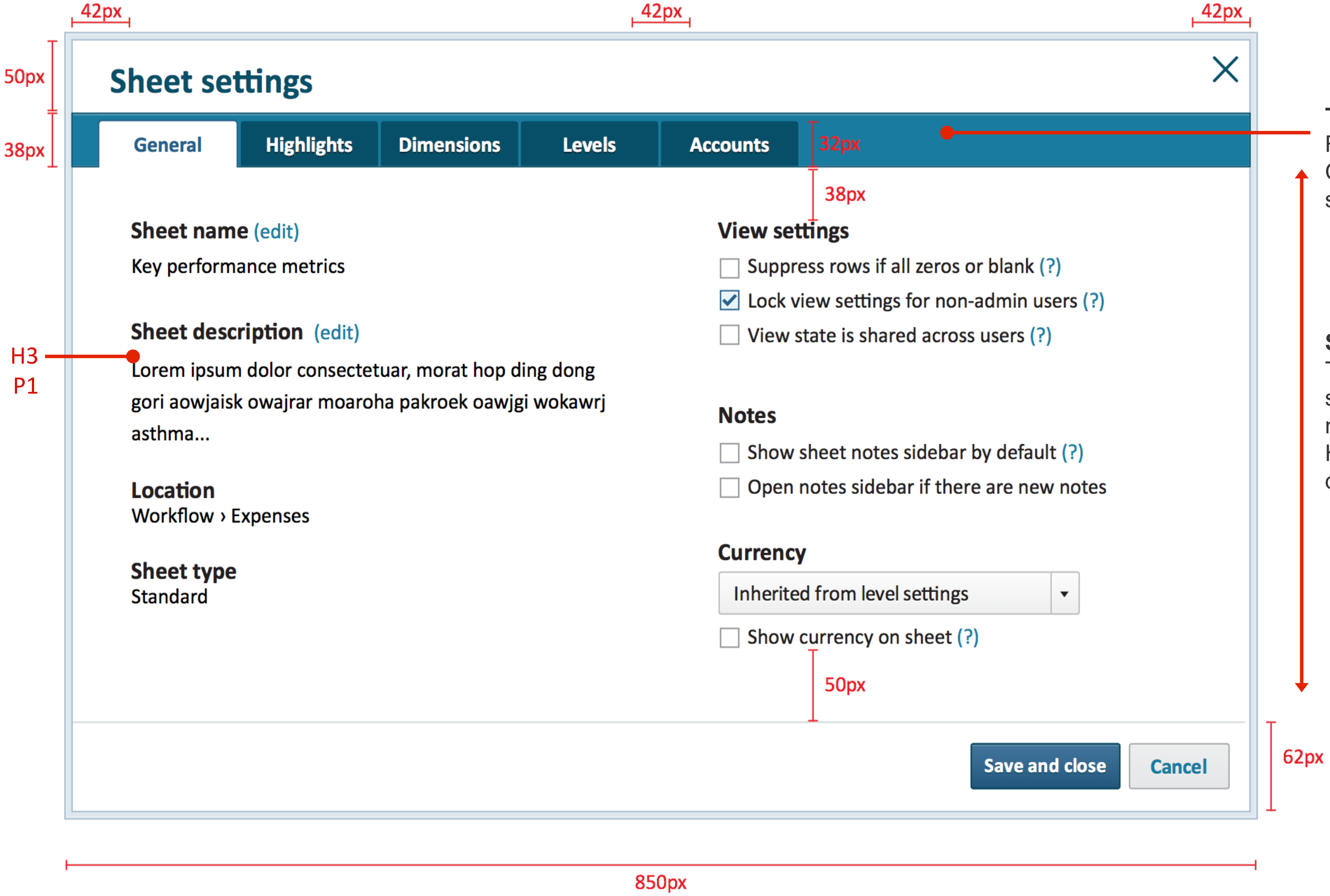
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

☑ Do not show this window again

Secondary Components

Settings modal window

Approved


42px
42px
42px
50px
38px
32px
38px
H3
P1
50px
62px
850px
General
Highlights
Dimensions
Levels
Accounts
Save and close
Cancel

Sheet settings

Sheet name (edit)
Key performance metrics

Sheet description (edit)
Lorem ipsum dolor consectetuar, morat hop ding dong gori aowjaisk owajrar moaroha pakroek oawjgi wokawrj asthma...

Location
Workflow › Expenses

Sheet type
Standard

View settings
- ☐ Suppress rows if all zeros or blank (?)
- ☑ Lock view settings for non-admin users (?)
- ☐ View state is shared across users (?)

Notes
- ☐ Show sheet notes sidebar by default (?)
- ☐ Open notes sidebar if there are new notes

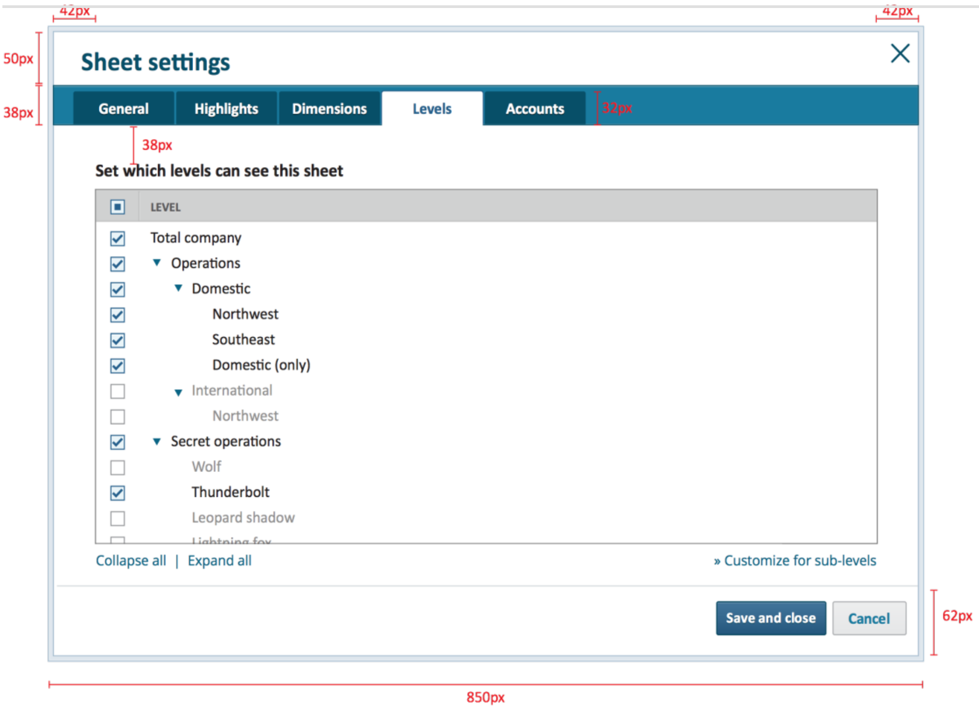
Currency
Inherited from level settings ▾
- ☐ Show currency on sheet (?)

Tabs
Refer to “Secondary Components: Tabs” for specs

Scrolling
The settings modal can scroll if the content does not fit the screen. Header or footer areas do not scroll.

Secondary Components

Settings modal window


42px
42px
50px
38px
32px
38px
62px
850px

Sheet settings

General | Highlights | Dimensions | Levels | Accounts

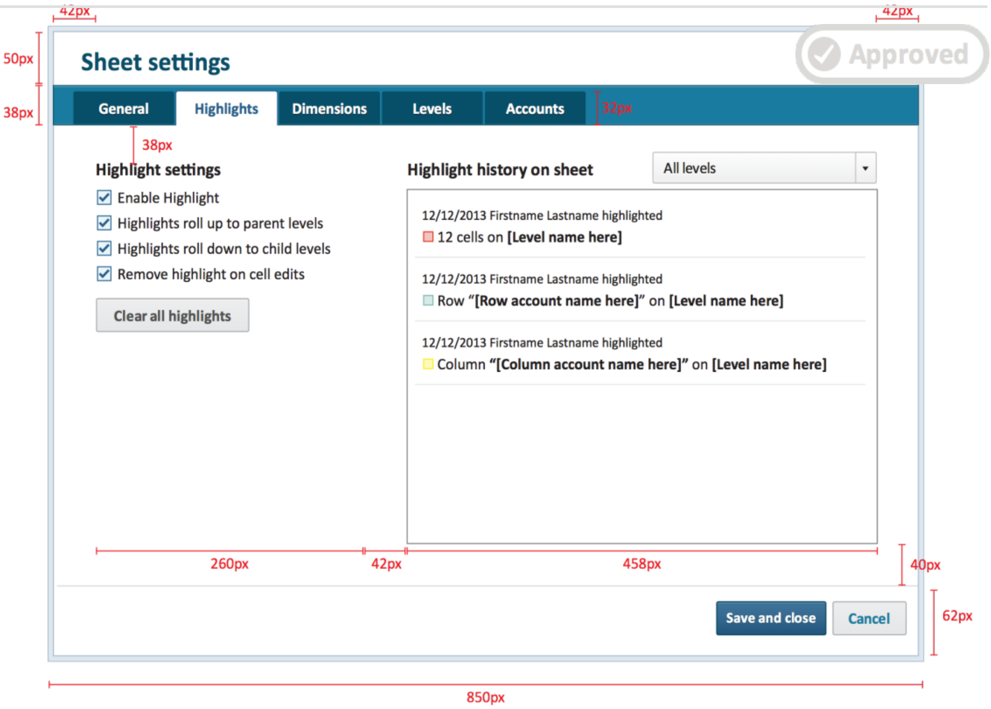
Set which levels can see this sheet

☑	LEVEL
☑	Total company
☑	▼ Operations
☑	▼ Domestic
☑	Northwest
☑	Southeast
☑	Domestic (only)
☐	▼ International
☐	Northwest
☑	▼ Secret operations
☐	Wolf
☑	Thunderbolt
☐	Leopard shadow

Collapse all | Expand all

» Customize for sub-levels

Save and close
Cancel


42px
42px
50px
38px
32px
38px
260px
42px
458px
40px
62px
850px
Approved

Sheet settings

General | Highlights | Dimensions | Levels | Accounts

Highlight settings

- ☑ Enable Highlight
- ☑ Highlights roll up to parent levels
- ☑ Highlights roll down to child levels
- ☑ Remove highlight on cell edits

Clear all highlights

Highlight history on sheet

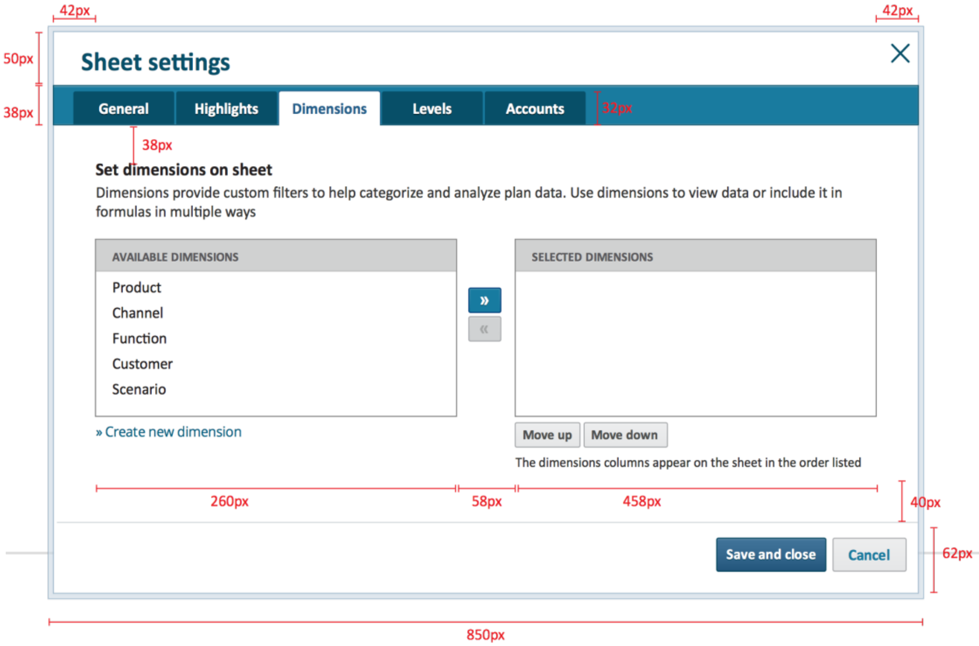
All levels ▾

12/12/2013 Firstname Lastname highlighted
🟥 12 cells on **[Level name here]**

12/12/2013 Firstname Lastname highlighted
🟩 Row **"[Row account name here]"** on **[Level name here]**

12/12/2013 Firstname Lastname highlighted
🟨 Column **"[Column account name here]"** on **[Level name here]**

Save and close
Cancel


42px
42px
50px
38px
32px
38px
260px
58px
458px
40px
62px
850px

Sheet settings

General | Highlights | Dimensions | Levels | Accounts

Set dimensions on sheet

Dimensions provide custom filters to help categorize and analyze plan data. Use dimensions to view data or include it in formulas in multiple ways

AVAILABLE DIMENSIONS

- Product
- Channel
- Function
- Customer
- Scenario

SELECTED DIMENSIONS

» Create new dimension

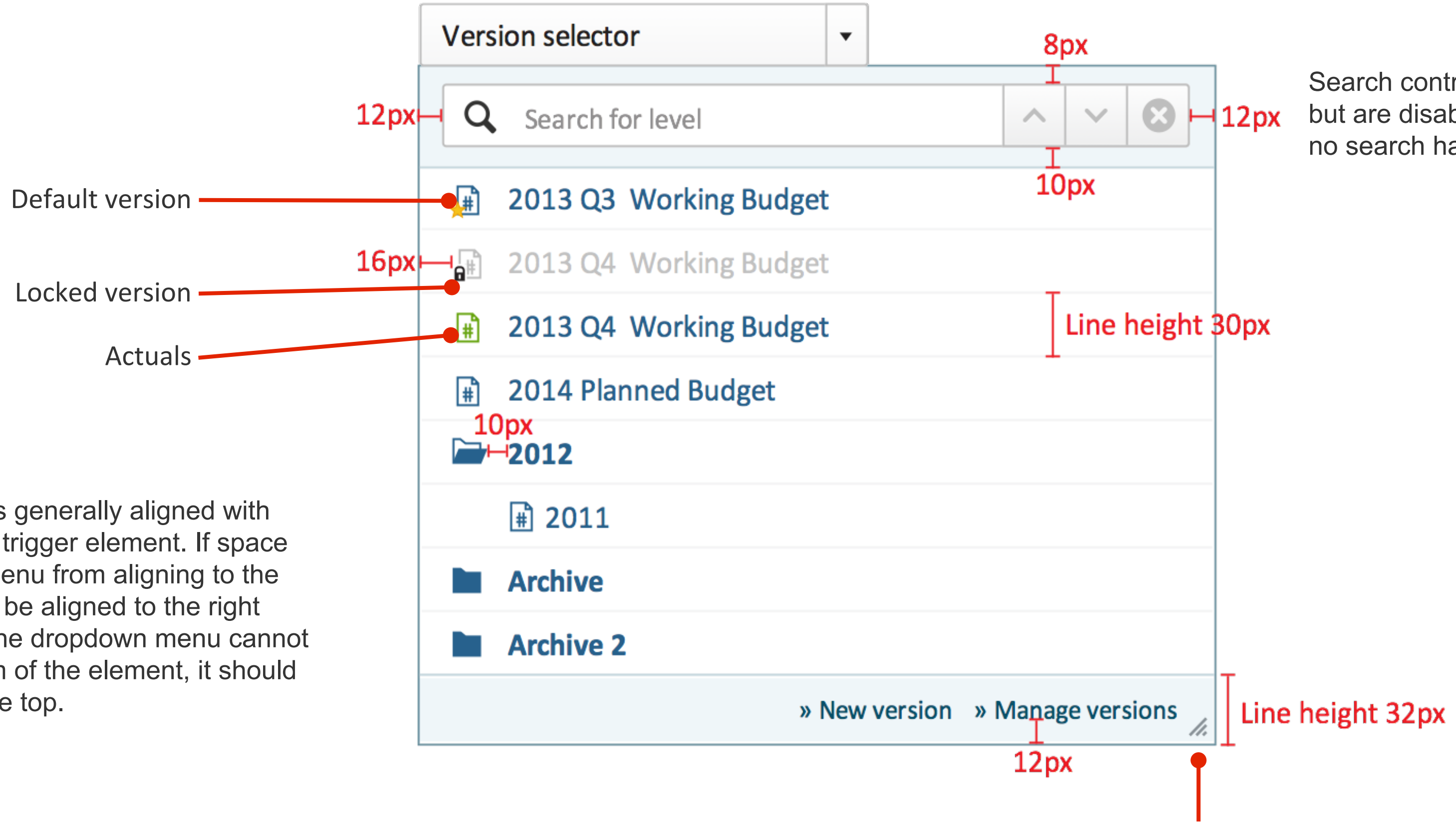
»
«
Move up
Move down

The dimensions columns appear on the sheet in the order listed

Save and close
Cancel

Version selector

Approved


Version selector
Search for level
2013 Q3 Working Budget
2013 Q4 Working Budget
2013 Q4 Working Budget
2014 Planned Budget
2012
2011
Archive
Archive 2
» New version
» Manage versions
8px
12px
12px
10px
16px
Line height 30px
10px
Line height 32px
12px
Default version
Locked version
Actuals

Search controls are always showing, but are disabled (shown here) when no search has been performed.

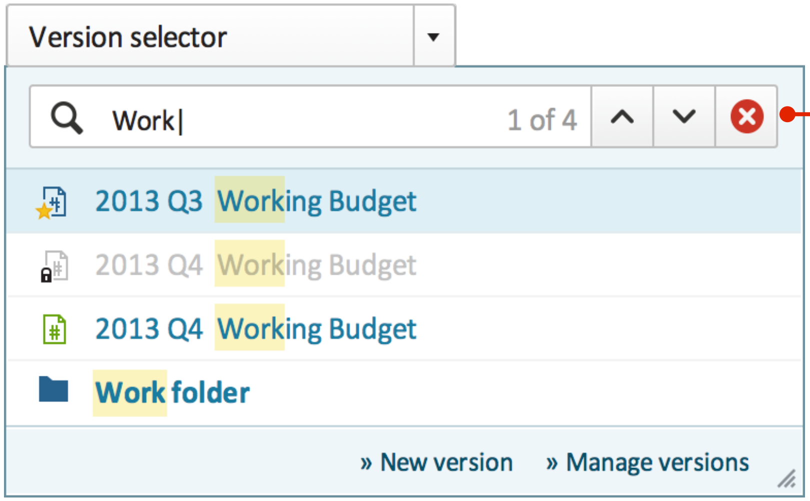
Expand menu by dragging from corner. If there is no room to expand on right, place the element on the left bottom corner instead.

Alignment
Dropdown menu is generally aligned with the left side of the trigger element. If space is restricting the menu from aligning to the right, the menu can be aligned to the right side. Likewise, if the dropdown menu cannot open to the bottom of the element, it should open up toward the top.

Secondary Components

Version selector search

Approved


Version selector
Work|
1 of 4
2013 Q3 Working Budget
2013 Q4 Working Budget
2013 Q4 Working Budget
Work folder
» New version
» Manage versions

Search within a selector. Autofocus on first item.

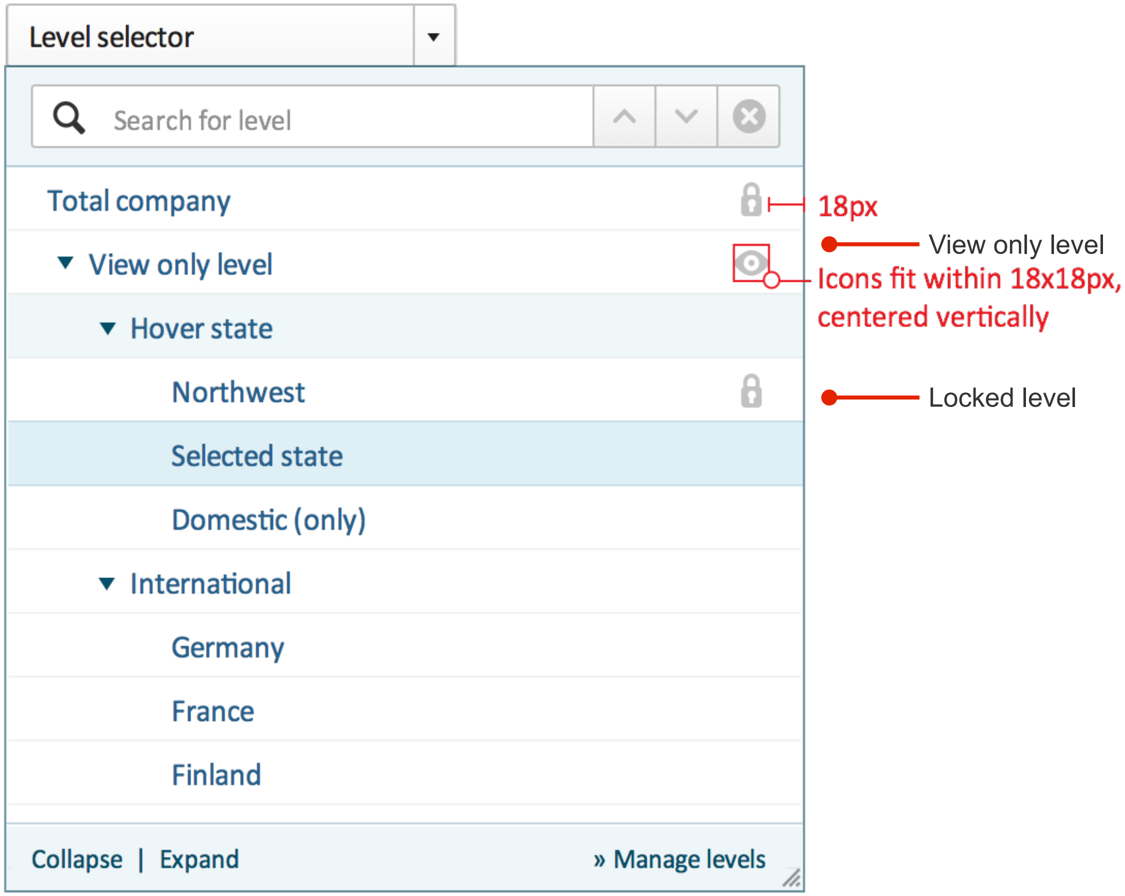
Highlight matching strings with #ecd000, 25% opaque fill.

Clicking x reverts to previous state of navigation, arrows focus the previous and next result; “1 of 4” changes to “2 of 4” and so on. Matching string is highlighted within the results. Selection cycles from the last to the first.

Level selector

See version selector for other dimensions

Approved


Level selector
Search for level
Total company
View only level
Hover state
Northwest
Selected state
Domestic (only)
International
Germany
France
Finland
Collapse | Expand
» Manage levels

18px

View only level

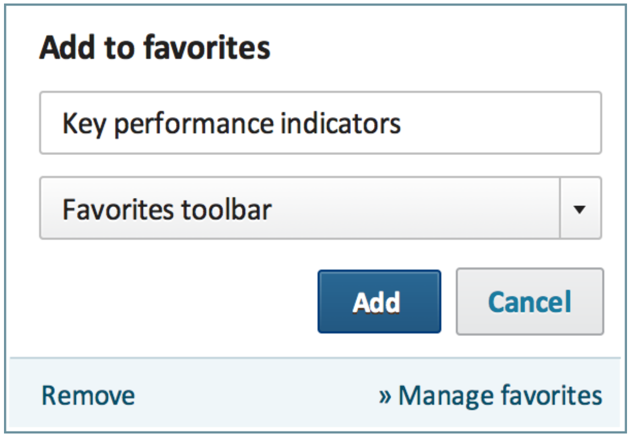
Icons fit within 18x18px, centered vertically

Locked level

Secondary Components

Favorites popup

Approved



Add to favorites

Key performance indicators

Favorites toolbar

Add
Cancel
Remove
» Manage favorites

Form components

✓ Approved

Normal, 1px stroke #bebebe

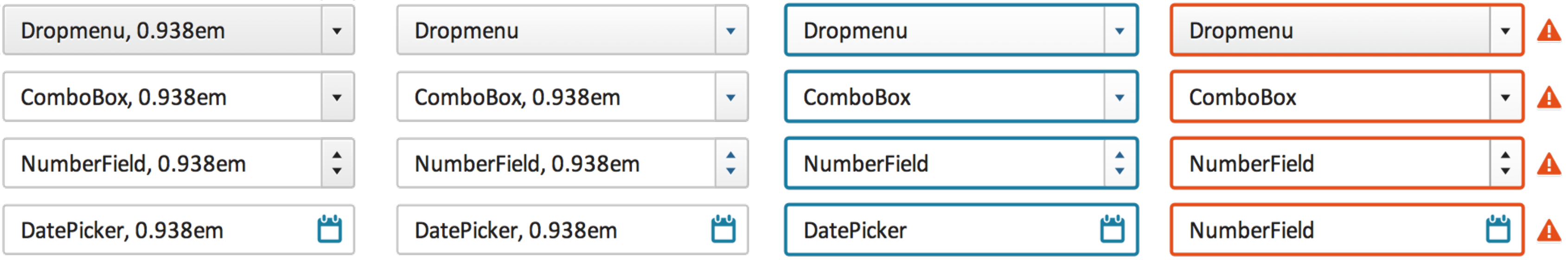
20px

Hover (lighten with 20% #FFFFFF)

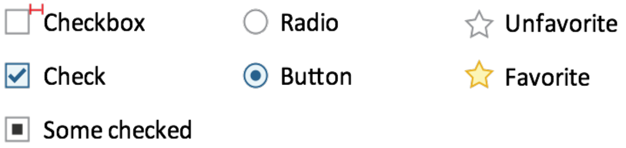
Focused, 2px stroke #187a9e

Error, 2px stroke #cb3424

30px


Dropmenu, 0.938em
Dropmenu
Dropmenu
Dropmenu
ComboBox, 0.938em
ComboBox, 0.938em
ComboBox
ComboBox
NumberField, 0.938em
NumberField, 0.938em
NumberField
NumberField
DatePicker, 0.938em
DatePicker, 0.938em
DatePicker
NumberField

8px


☐ Checkbox
○ Radio
☆ Unfavorite
☑ Check
● Button
★ Favorite
▣ Some checked

Link up

Link hover

» Link that opens a new browser window

» Link that opens a new browser window hover

› Link for admin screen

› Link for admin screen hover

Tooltips are gray, header 15px bold

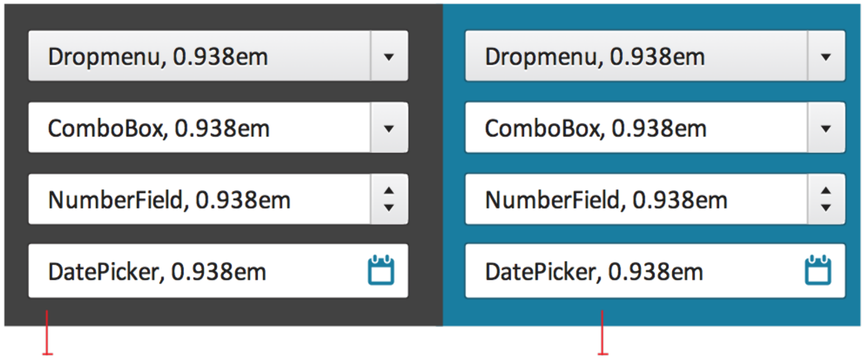
13px for detail text. Box is gray, 95% opaque

1px stroke, #064f68

Top inner bevel stroke, 20% opaque #FFFFFF

Gradient: #0a6b8e – #0a5d7d

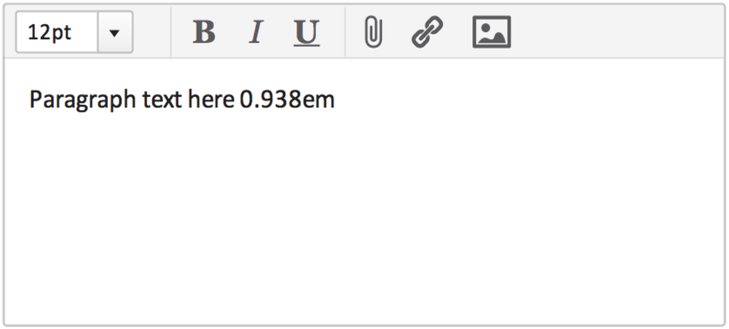
Negative background

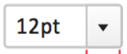

Dropmenu, 0.938em
Dropmenu, 0.938em
ComboBox, 0.938em
ComboBox, 0.938em
NumberField, 0.938em
NumberField, 0.938em
DatePicker, 0.938em
DatePicker, 0.938em

Otherwise same, but outer stroke is #000000

Otherwise same, but outer stroke is #1c5c73

30px


12pt
B
I
U
Paragraph text here 0.938em



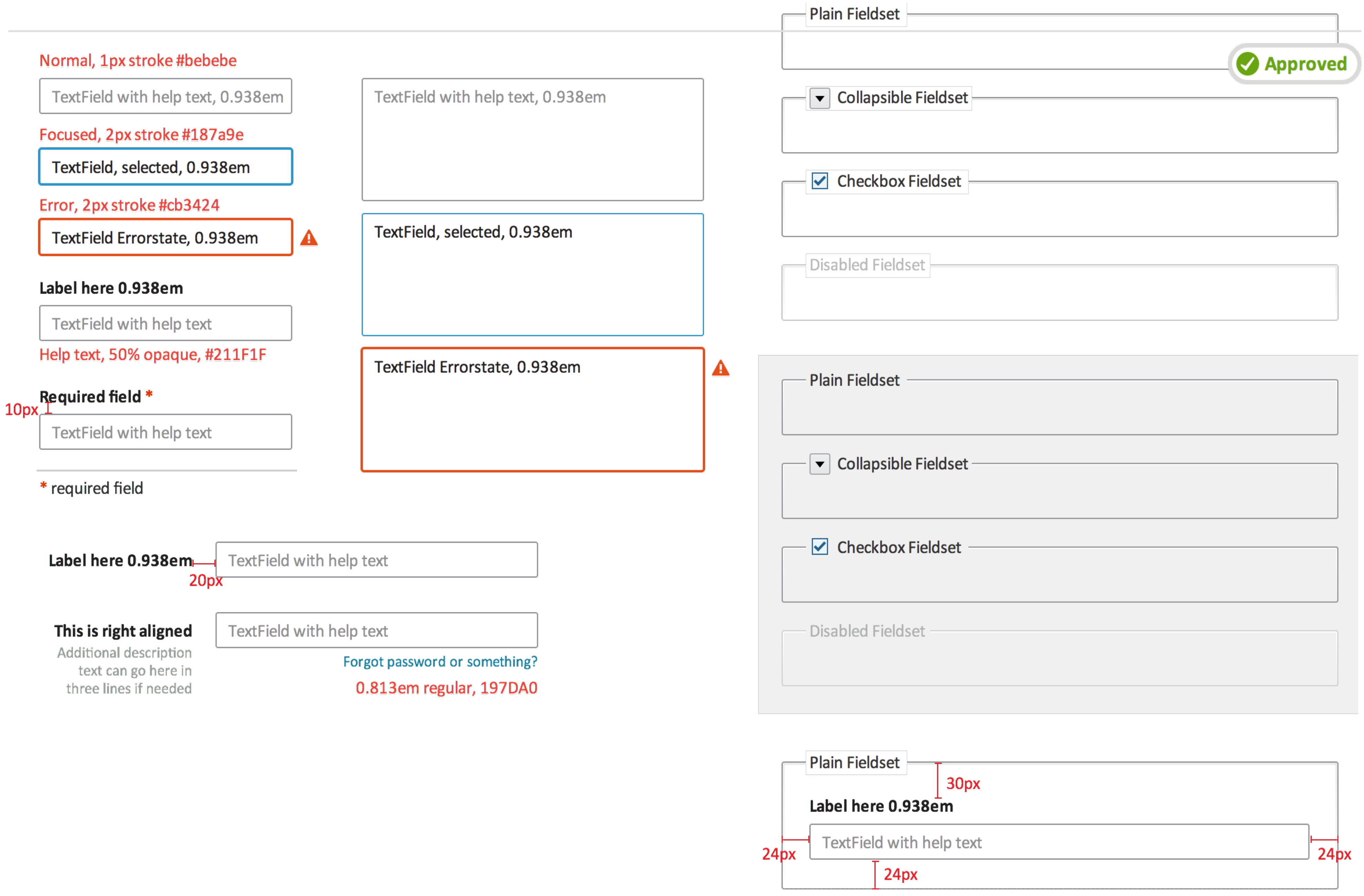
24px

20px

Each text field and dropmenu component can appear in toolbars too, resize the component into 24px high.

Secondary Components

Form components



Normal, 1px stroke #bebebe

TextField with help text, 0.938em

Focused, 2px stroke #187a9e

TextField, selected, 0.938em

Error, 2px stroke #cb3424

TextField Errorstate, 0.938em

Label here 0.938em

TextField with help text

Help text, 50% opaque, #211F1F

Required field *

10px

TextField with help text

* required field

Label here 0.938em

20px

TextField with help text

This is right aligned

Additional description text can go here in three lines if needed

TextField with help text

Forgot password or something?

0.813em regular, 197DA0

TextField with help text, 0.938em

TextField, selected, 0.938em

TextField Errorstate, 0.938em

Plain Fieldset

✓ Approved

▼ Collapsible Fieldset

☑ Checkbox Fieldset

Disabled Fieldset

Plain Fieldset

▼ Collapsible Fieldset

☑ Checkbox Fieldset

Disabled Fieldset

Plain Fieldset

30px

Label here 0.938em

24px

TextField with help text

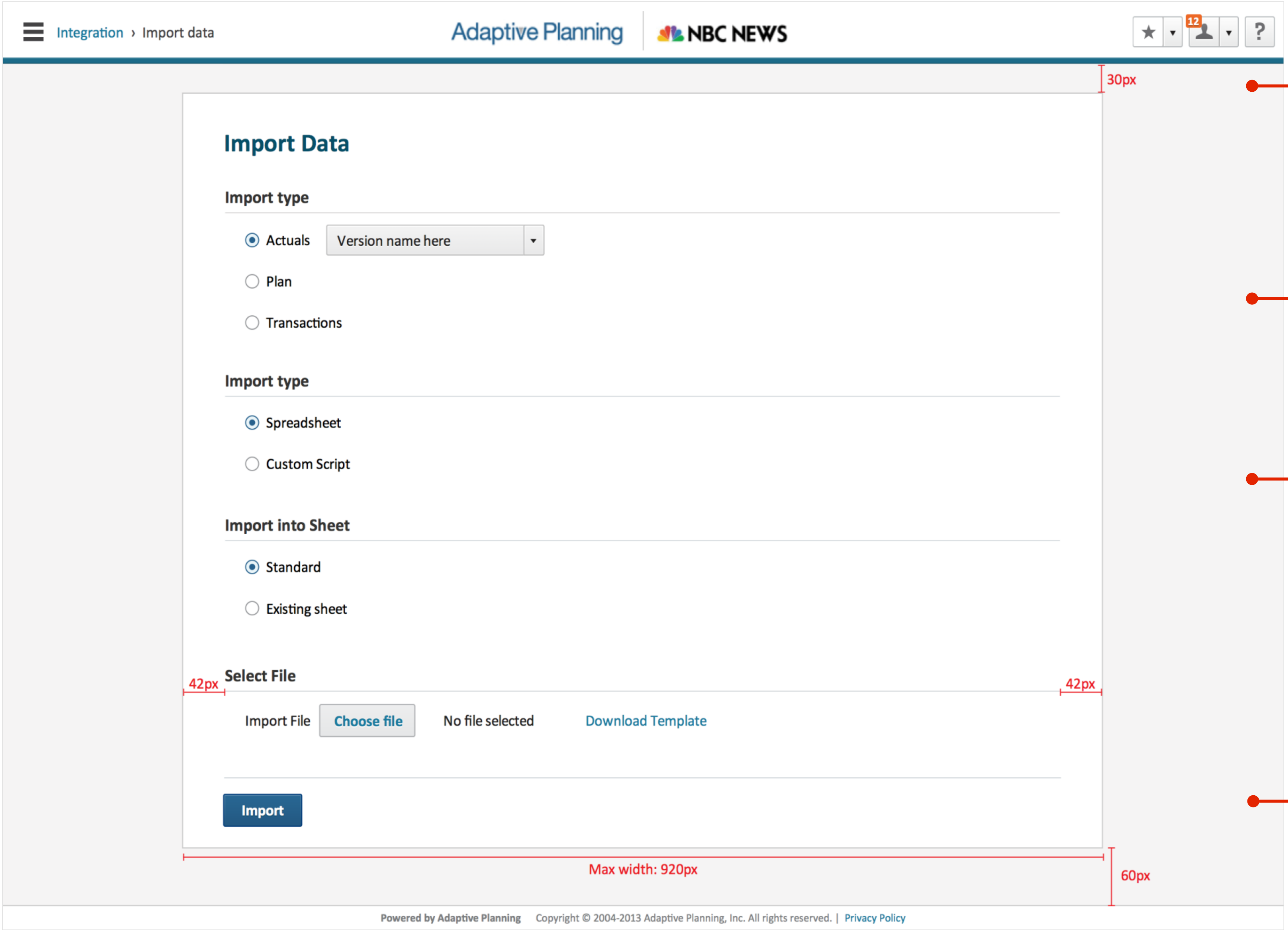
24px

24px

Secondary Components

In-page form example

Approved



Integration › Import data
Adaptive Planning
NBC NEWS
★
12
?
30px
42px
42px
Max width: 920px
60px

Import Data

Import type

● Actuals — Version name here ▾

○ Plan

○ Transactions

Import type

● Spreadsheet

○ Custom Script

Import into Sheet

● Standard

○ Existing sheet

Select File

Import File [Choose file] No file selected Download Template

[Import]

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Width of the page scales smaller. Retain a 20px minimum gutter between page edge and container box.

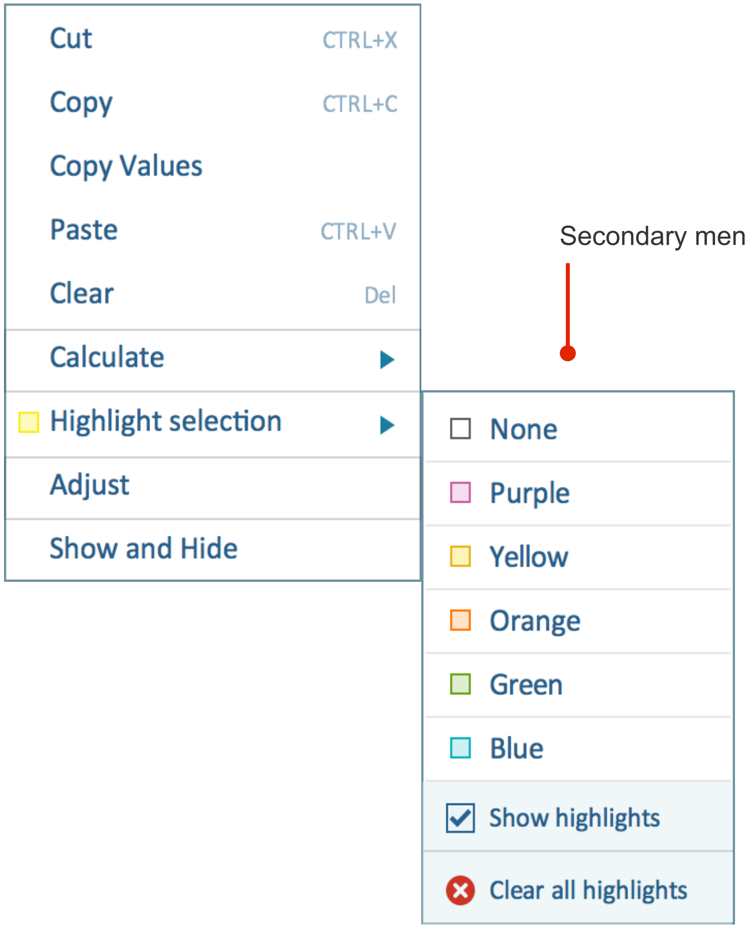
On radiobutton lists, hide subcontrols if item is not selected.

Use 1px #d2d8dc separating lines to divide content into sections. Section headers are H3.

Separate form actions under the form. Align action buttons with form fields.

Context menu

Approved


Cut CTRL+X
Copy CTRL+C
Copy Values
Paste CTRL+V
Clear Del
Calculate ▶
Highlight selection ▶
Adjust
Show and Hide
☐ None
☐ Purple
☐ Yellow
☐ Orange
☐ Green
☐ Blue
☑ Show highlights
Clear all highlights

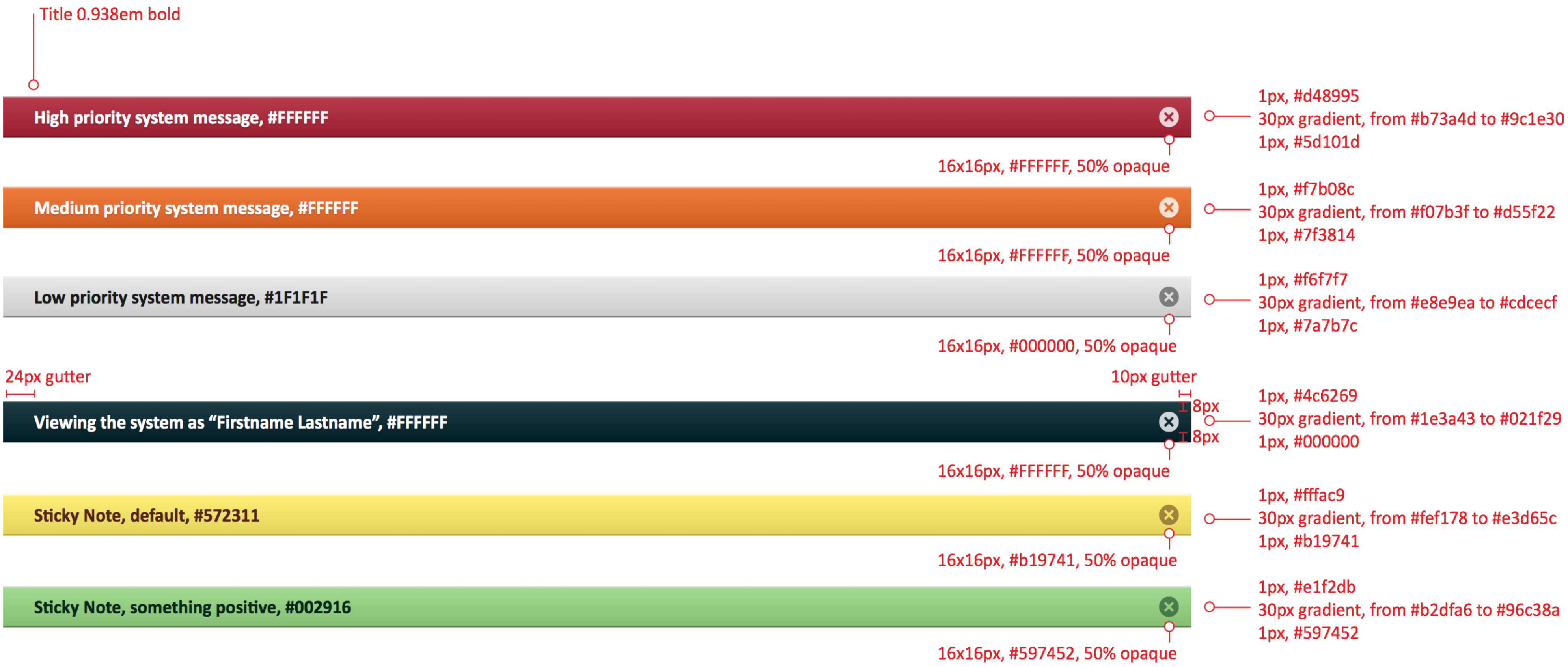
Separate key actions into their own sections

Secondary menu

Secondary Components

System message & sticky notes

Approved



Title 0.938em bold

High priority system message, #FFFFFF

16x16px, #FFFFFF, 50% opaque

1px, #d48995
30px gradient, from #b73a4d to #9c1e30
1px, #5d101d

Medium priority system message, #FFFFFF

16x16px, #FFFFFF, 50% opaque

1px, #f7b08c
30px gradient, from #f07b3f to #d55f22
1px, #7f3814

Low priority system message, #1F1F1F

16x16px, #000000, 50% opaque

1px, #f6f7f7
30px gradient, from #e8e9ea to #cdcecf
1px, #7a7b7c

24px gutter

10px gutter

8px

8px

Viewing the system as “Firstname Lastname”, #FFFFFF

16x16px, #FFFFFF, 50% opaque

1px, #4c6269
30px gradient, from #1e3a43 to #021f29
1px, #000000

Sticky Note, default, #572311

16x16px, #b19741, 50% opaque

1px, #fffac9
30px gradient, from #fef178 to #e3d65c
1px, #b19741

Sticky Note, something positive, #002916

16x16px, #597452, 50% opaque

1px, #e1f2db
30px gradient, from #b2dfa6 to #96c38a
1px, #597452

System message and sticky notes
span to full width of browser

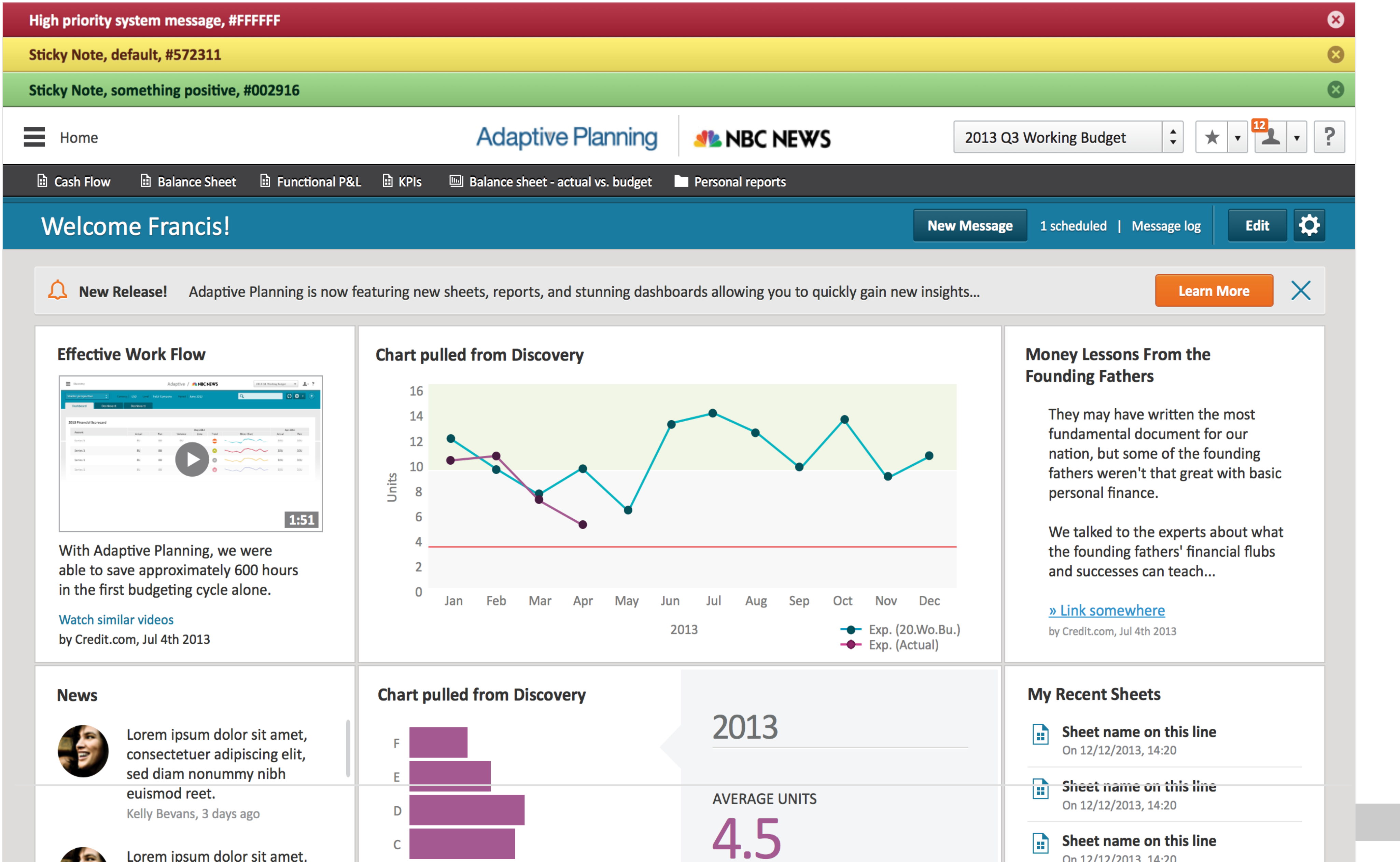
☒ Close button is optional

Secondary Components

System message & sticky notes

✓ Approved

Messages appear on top of navigation, and can be stacked on top of each other. Put oldest on top.



High priority system message, #FFFFFF

Sticky Note, default, #572311

Sticky Note, something positive, #002916

Home
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
New Message
1 scheduled
Message log
Edit
Learn More

Welcome Francis!

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing you to quickly gain new insights...

Effective Work Flow

1:51

With Adaptive Planning, we were able to save approximately 600 hours in the first budgeting cycle alone.

Watch similar videos

by Credit.com, Jul 4th 2013

Chart pulled from Discovery

16
14
12
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
Exp. (Actual)

Money Lessons From the Founding Fathers

They may have written the most fundamental document for our nation, but some of the founding fathers weren't that great with basic personal finance.

We talked to the experts about what the founding fathers' financial flubs and successes can teach...

» Link somewhere

by Credit.com, Jul 4th 2013

News

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.

Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet,

Chart pulled from Discovery

2013

AVERAGE UNITS

4.5

My Recent Sheets

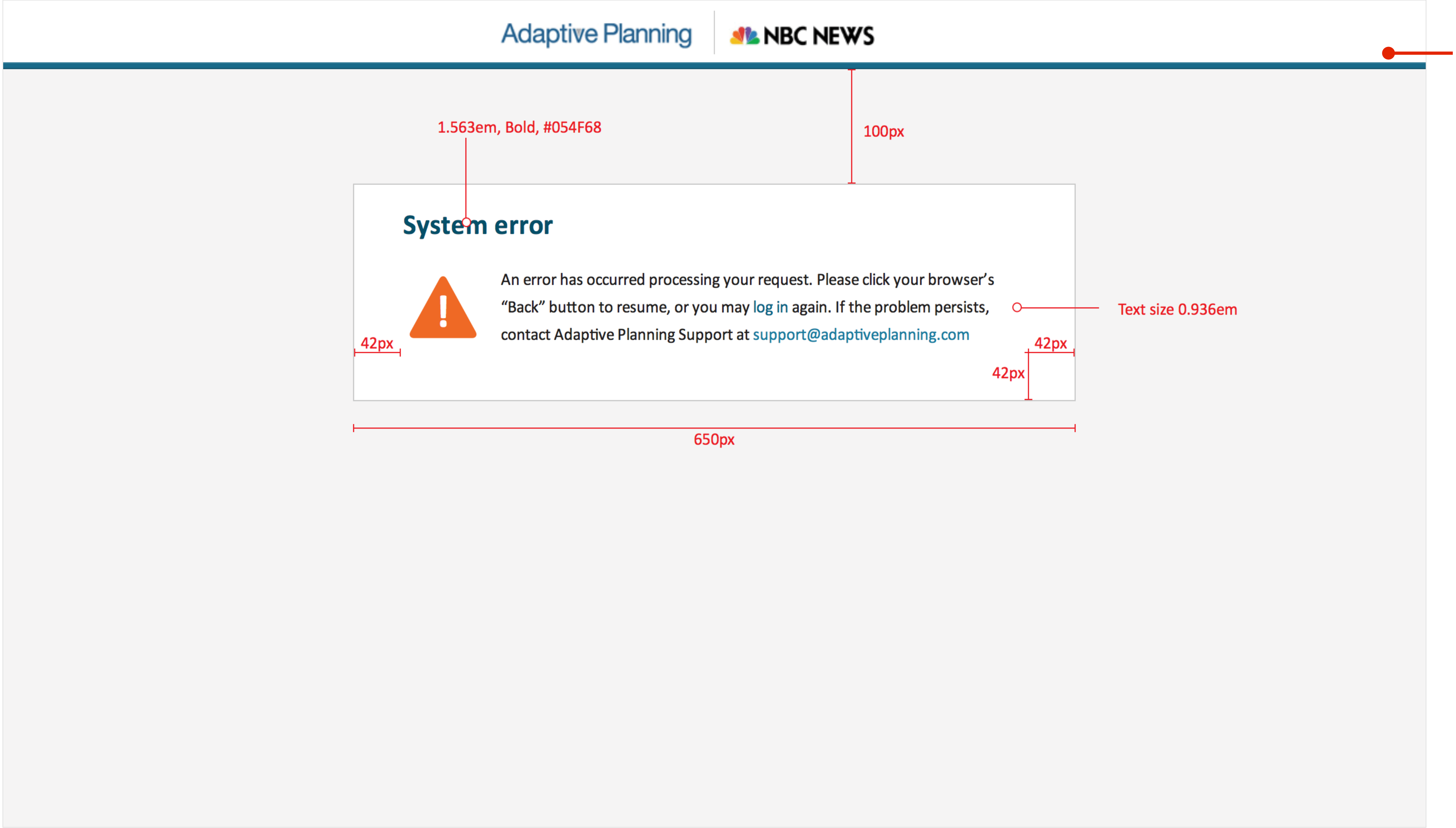
Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

System malfunction

✓ Approved


Adaptive Planning
NBC NEWS
100px
42px
42px
42px
650px

System error

An error has occurred processing your request. Please click your browser's "Back" button to resume, or you may log in again. If the problem persists, contact Adaptive Planning Support at support@adaptiveplanning.com

1.563em, Bold, #054F68

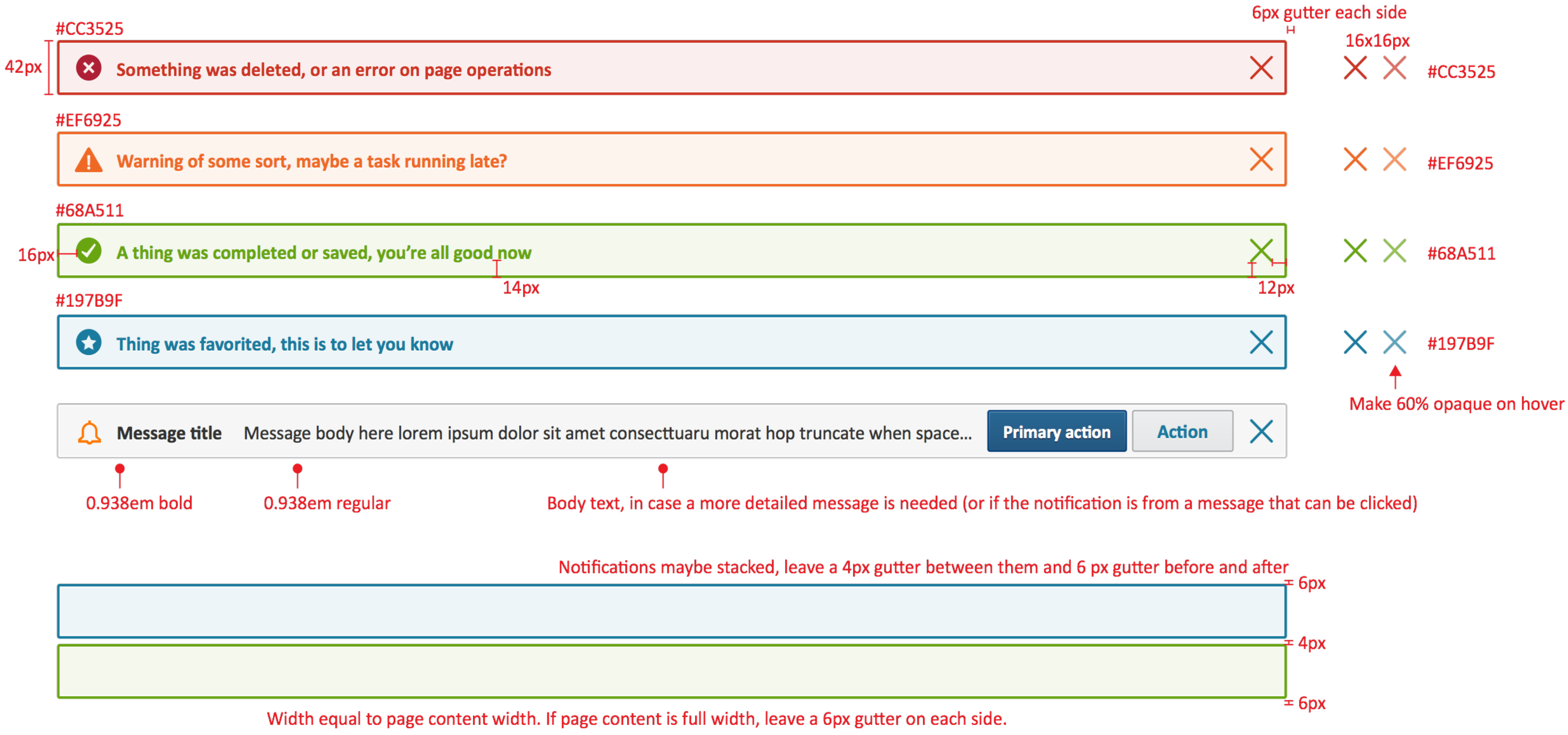
Text size 0.936em

Hide navigation if it's not functionable.

Secondary Components

News & process alerts

✓ Approved



6px gutter each side

16x16px

#CC3525

42px

Something was deleted, or an error on page operations

#CC3525

#EF6925

Warning of some sort, maybe a task running late?

#EF6925

#68A511

16px

A thing was completed or saved, you're all good now

14px

12px

#68A511

#197B9F

Thing was favorited, this is to let you know

#197B9F

Make 60% opaque on hover

Message title Message body here lorem ipsum dolor sit amet consecttuaru morat hop truncate when space...

0.938em bold

0.938em regular

Body text, in case a more detailed message is needed (or if the notification is from a message that can be clicked)

Notifications maybe stacked, leave a 4px gutter between them and 6 px gutter before and after

6px

4px

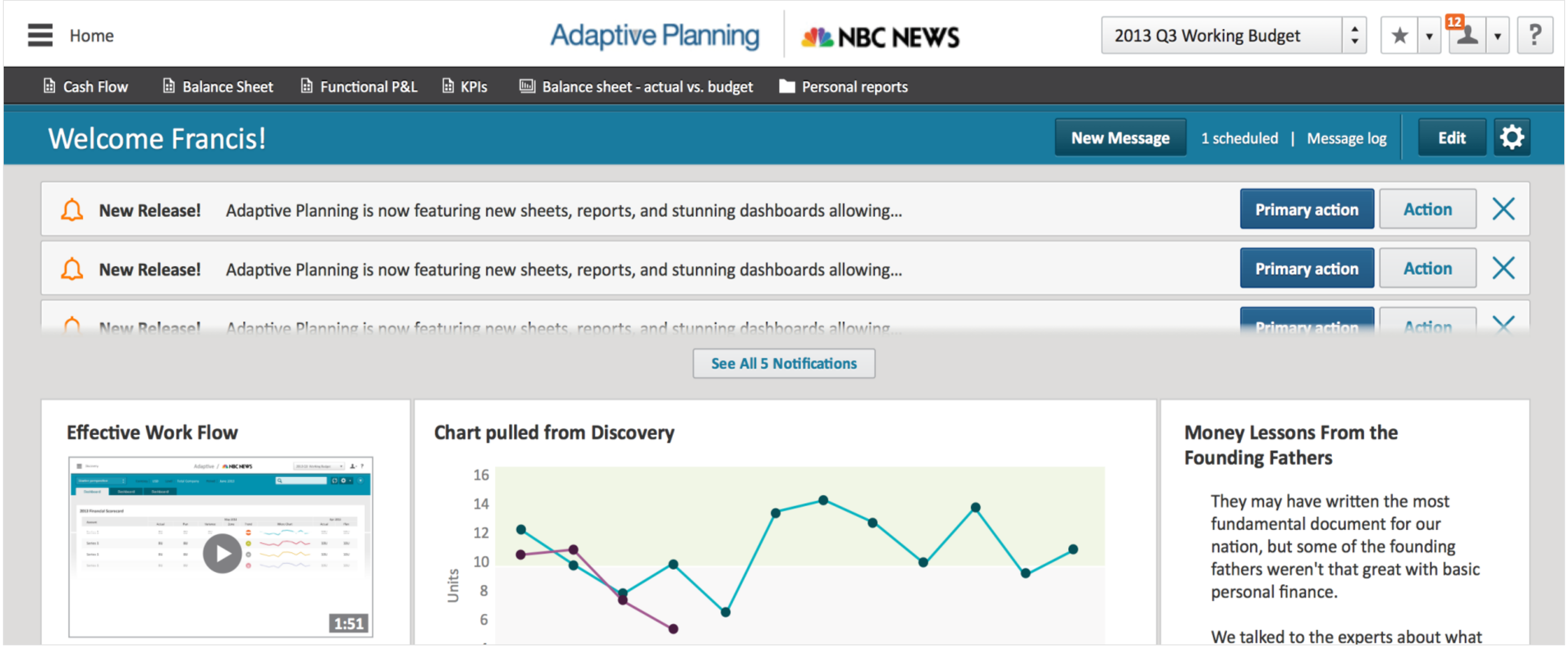
6px

Width equal to page content width. If page content is full width, leave a 6px gutter on each side.

Alert confirmations pushes content on the page down via slide. Close removes the alert immediately.

Secondary Components

News & process alerts overflow


Home
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
New Message
1 scheduled | Message log
Edit
Primary action
Action
See All 5 Notifications
1:51
16
14
12
10
8
6
Units

Welcome Francis!

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

Effective Work Flow

Chart pulled from Discovery

Money Lessons From the Founding Fathers

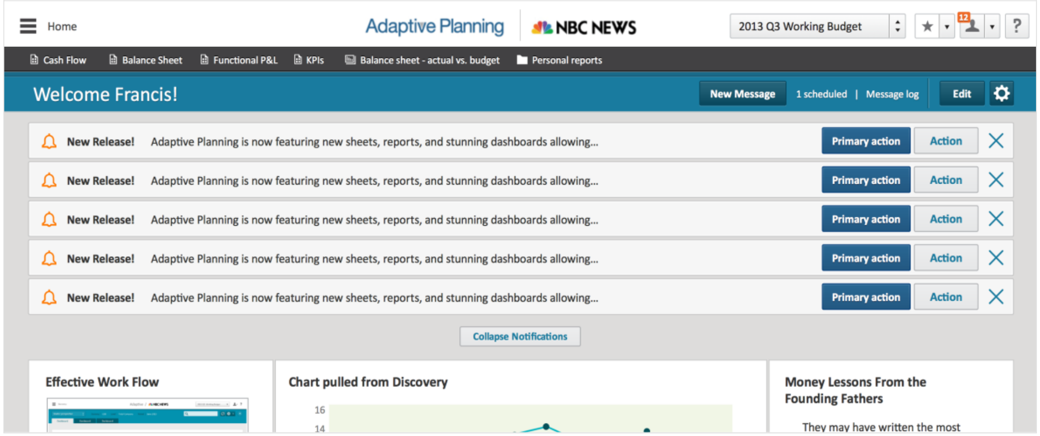
They may have written the most fundamental document for our nation, but some of the founding fathers weren't that great with basic personal finance.

We talked to the experts about what

For more than 3 news alerts, the first 2 are shown and the rest overflows into an expandable section.

Closing the first or second alert from this view moves the list up. The expandable section disappears when 2 news alerts are remaining.

Work in Progress
To be determined in redesign


Home
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
New Message
1 scheduled | Message log
Edit
Primary action
Action
Collapse Notifications
16
14

Welcome Francis!

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

New Release! Adaptive Planning is now featuring new sheets, reports, and stunning dashboards allowing...

Effective Work Flow

Chart pulled from Discovery

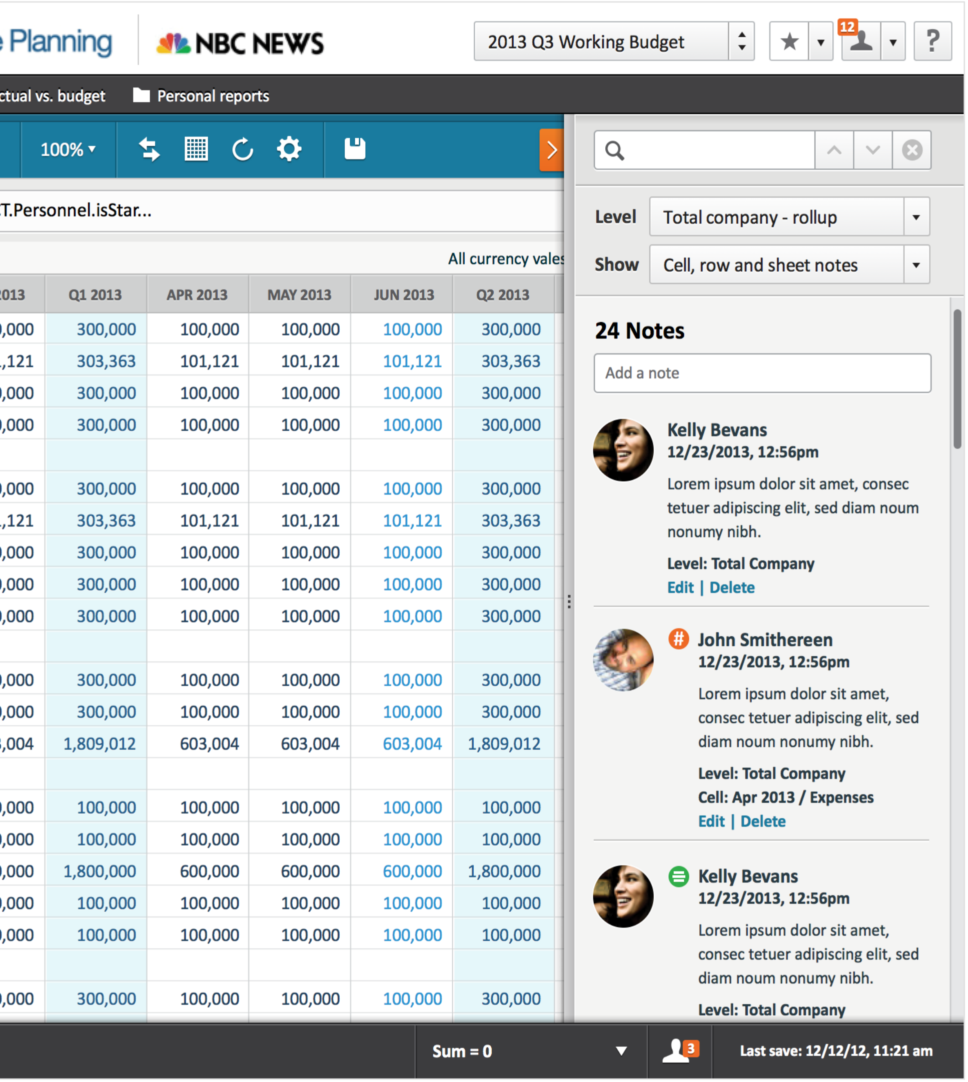
Money Lessons From the Founding Fathers

They may have written the most

Secondary Components

Notes sidebar

Approved



Planning
NBC NEWS
2013 Q3 Working Budget
12
?
ctual vs. budget
Personal reports
100%
T.Personnel.isStar...
All currency vales
Level
Show
Add a note

Level: Total company - rollup

Show: Cell, row and sheet notes

013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013
,000	300,000	100,000	100,000	100,000	300,000
,121	303,363	101,121	101,121	101,121	303,363
,000	300,000	100,000	100,000	100,000	300,000
,000	300,000	100,000	100,000	100,000	300,000
,000	300,000	100,000	100,000	100,000	300,000
,121	303,363	101,121	101,121	101,121	303,363
,000	300,000	100,000	100,000	100,000	300,000
,000	300,000	100,000	100,000	100,000	300,000
,000	300,000	100,000	100,000	100,000	300,000
,000	300,000	100,000	100,000	100,000	300,000
,000	300,000	100,000	100,000	100,000	300,000
,004	1,809,012	603,004	603,004	603,004	1,809,012
,000	100,000	100,000	100,000	100,000	100,000
,000	100,000	100,000	100,000	100,000	100,000
,000	1,800,000	600,000	600,000	600,000	1,800,000
,000	100,000	100,000	100,000	100,000	100,000
,000	100,000	100,000	100,000	100,000	100,000
,000	300,000	100,000	100,000	100,000	300,000

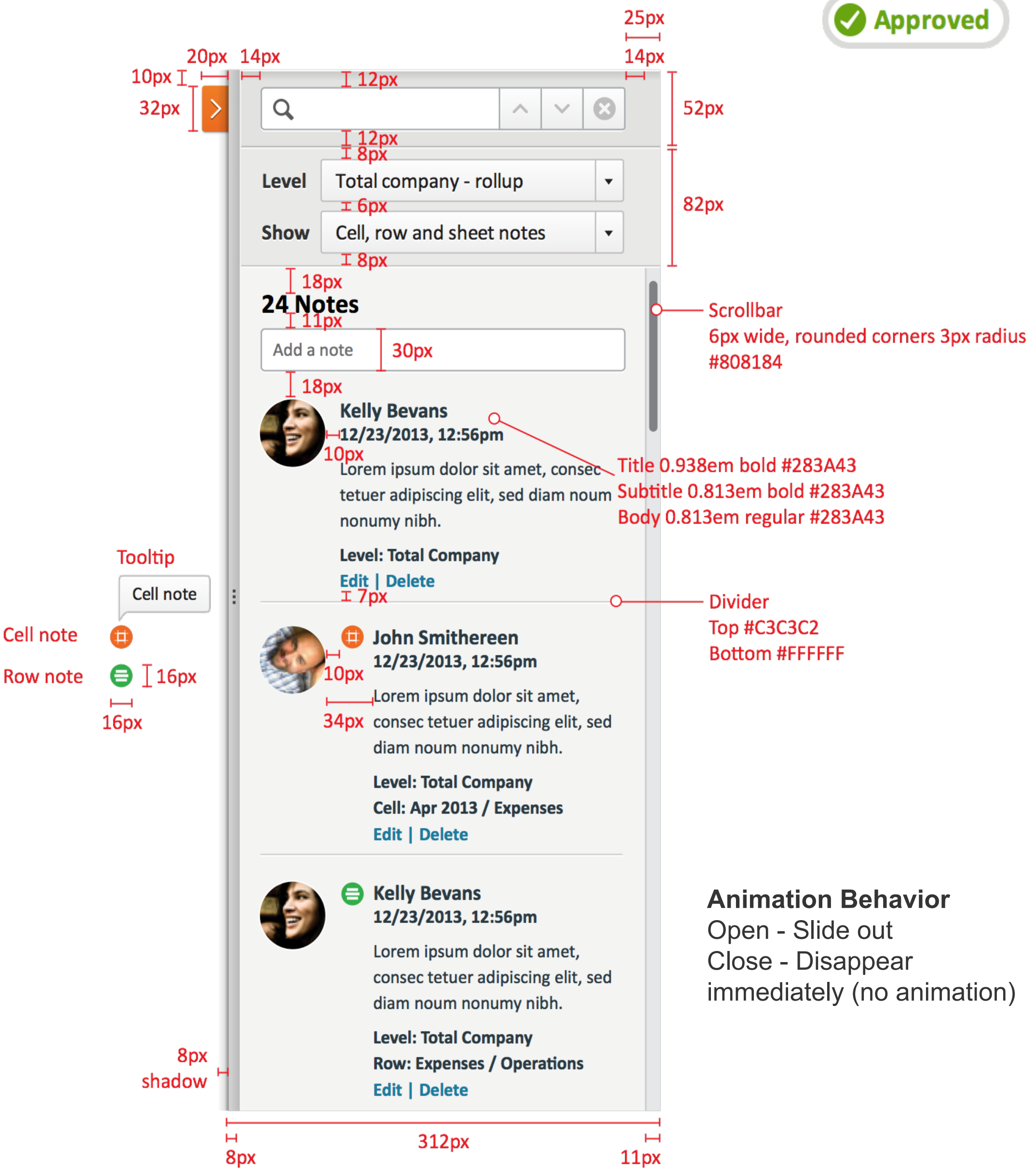
24 Notes

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Edit | Delete

John Smithereen
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Cell: Apr 2013 / Expenses
Edit | Delete

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company

Sum = 0
3
Last save: 12/12/12, 11:21 am



25px
20px
14px
14px
10px
12px
32px
52px
12px
8px
82px
6px
8px
18px
11px
30px
18px
10px
7px
10px
34px
16px
16px
8px
shadow
8px
312px
11px
Tooltip
Cell note
Cell note
Row note
Add a note

Level: Total company - rollup

Show: Cell, row and sheet notes

24 Notes

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Edit | Delete

John Smithereen
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Cell: Apr 2013 / Expenses
Edit | Delete

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Row: Expenses / Operations
Edit | Delete

Scrollbar
6px wide, rounded corners 3px radius
#808184

Title 0.938em bold #283A43
Subtitle 0.813em bold #283A43
Body 0.813em regular #283A43

Divider
Top #C3C3C2
Bottom #FFFFFF

Animation Behavior
Open - Slide out
Close - Disappear immediately (no animation)

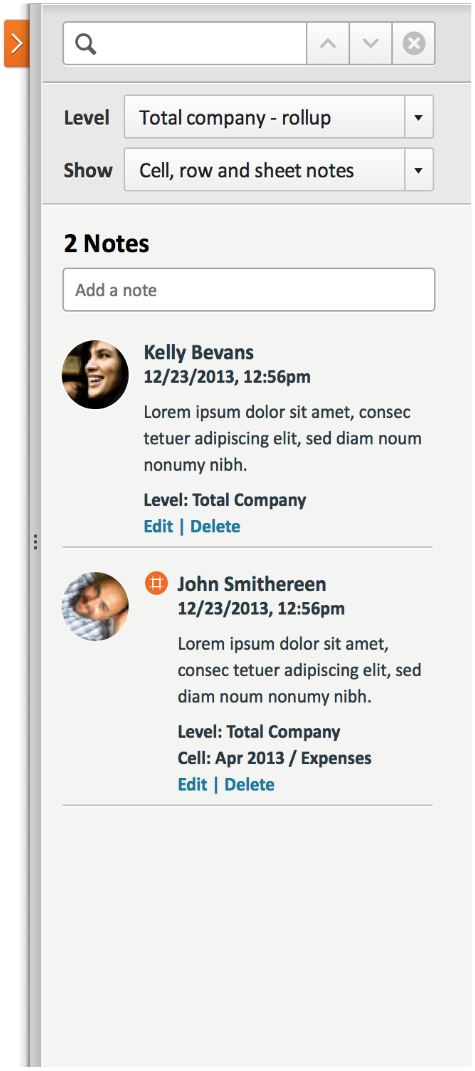
Secondary Components

Notes sidebar

Approved

0.938em regular #283A43

0.813em regular #283A43



Level Total company - rollup

Show Cell, row and sheet notes

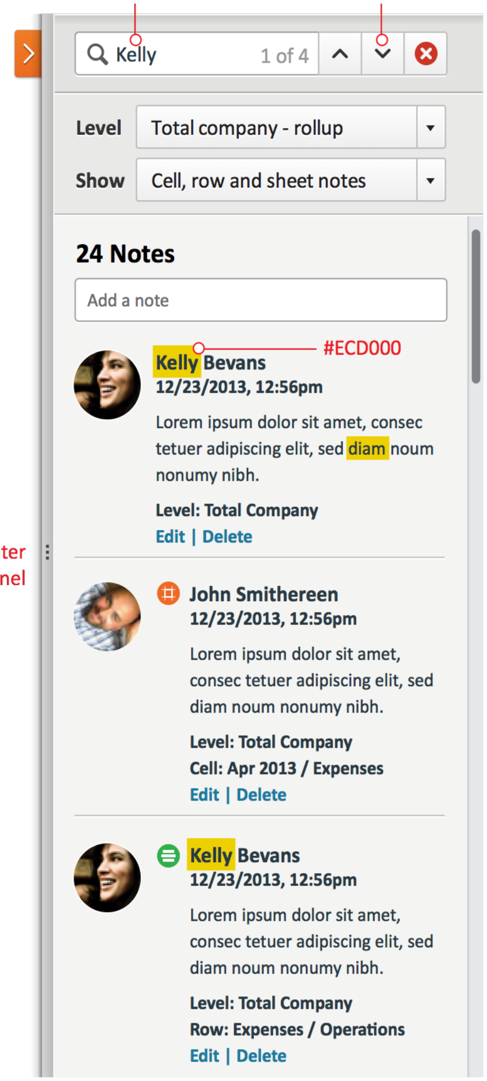
2 Notes

Add a note

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Edit | Delete

John Smithereen
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Cell: Apr 2013 / Expenses
Edit | Delete

Drag widget center aligned to panel



Kelly 1 of 4

Level Total company - rollup

Show Cell, row and sheet notes

24 Notes

Add a note

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Edit | Delete

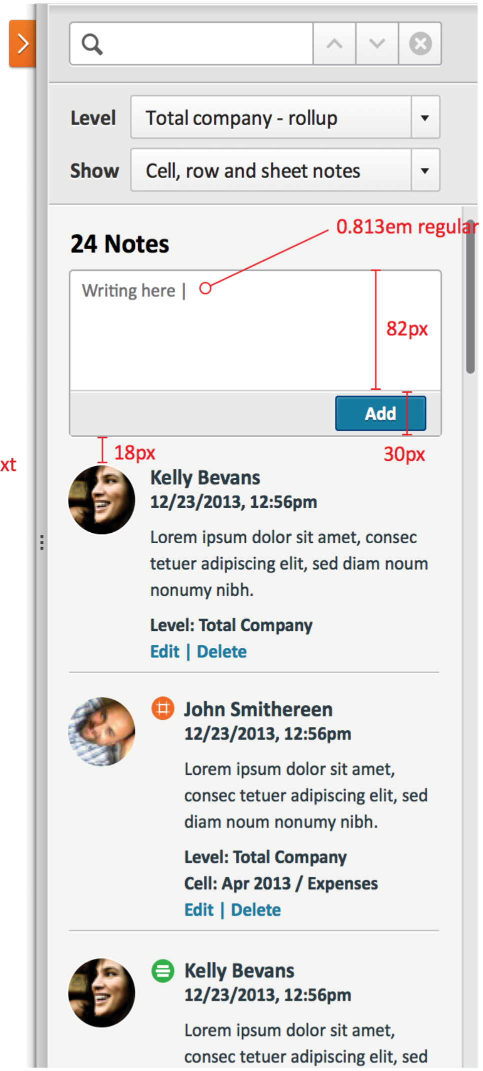
John Smithereen
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Cell: Apr 2013 / Expenses
Edit | Delete

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Row: Expenses / Operations
Edit | Delete

#ECD000

22px highlight title

16px highlight body text



Level Total company - rollup

Show Cell, row and sheet notes

24 Notes

Writing here |

Add

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Edit | Delete

John Smithereen
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.
Level: Total Company
Cell: Apr 2013 / Expenses
Edit | Delete

Kelly Bevans
12/23/2013, 12:56pm
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed

0.813em regular #283A43

82px

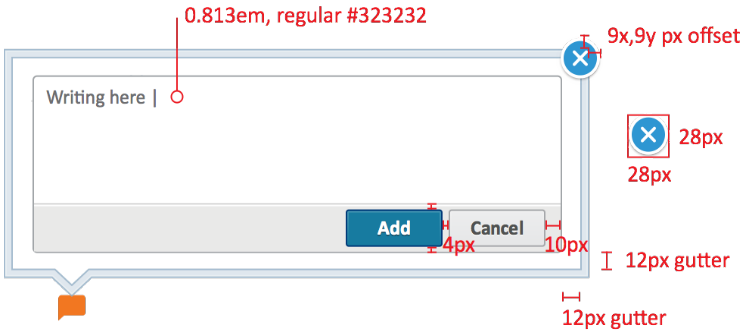
18px

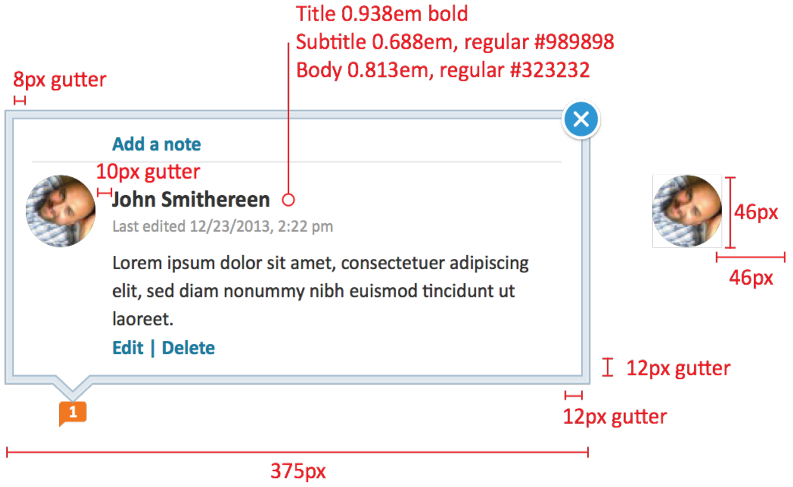
30px

Secondary Components

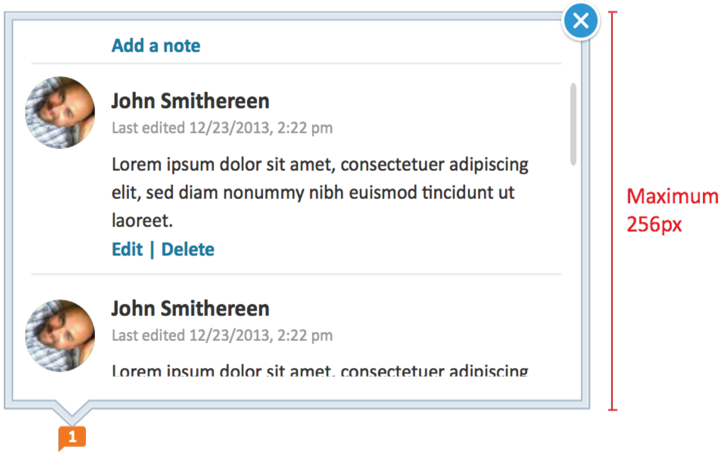
Notes tooltips

Approved


0.813em, regular #323232
9x,9y px offset
Writing here |
Add
Cancel
4px
10px
28px
28px
12px gutter
12px gutter

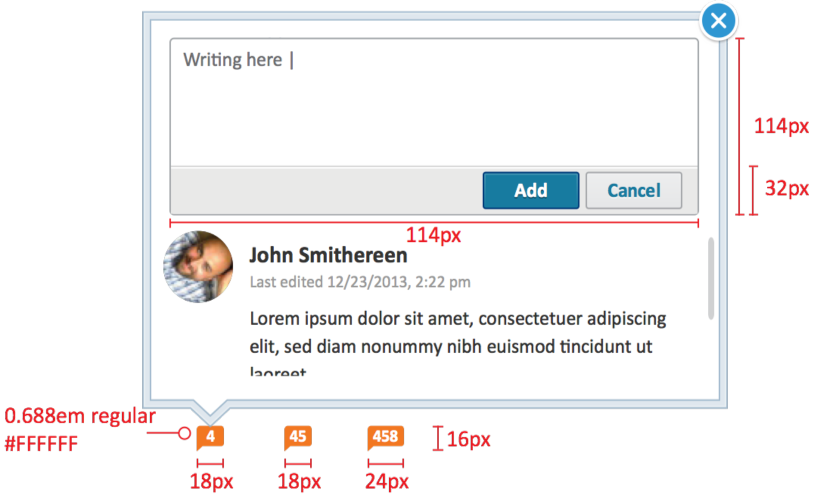

Title 0.938em bold
Subtitle 0.688em, regular #989898
Body 0.813em, regular #323232
8px gutter
Add a note
10px gutter
John Smithereen
Last edited 12/23/2013, 2:22 pm
Edit | Delete
1
46px
46px
12px gutter
12px gutter
375px

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.


Add a note
John Smithereen
Last edited 12/23/2013, 2:22 pm
Edit | Delete
John Smithereen
Last edited 12/23/2013, 2:22 pm
1
Maximum
256px

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.

Lorem ipsum dolor sit amet, consectetuer adipiscing


Writing here |
Add
Cancel
114px
32px
114px
John Smithereen
Last edited 12/23/2013, 2:22 pm
0.688em regular
#FFFFFF
4
45
458
16px
18px
18px
24px

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet

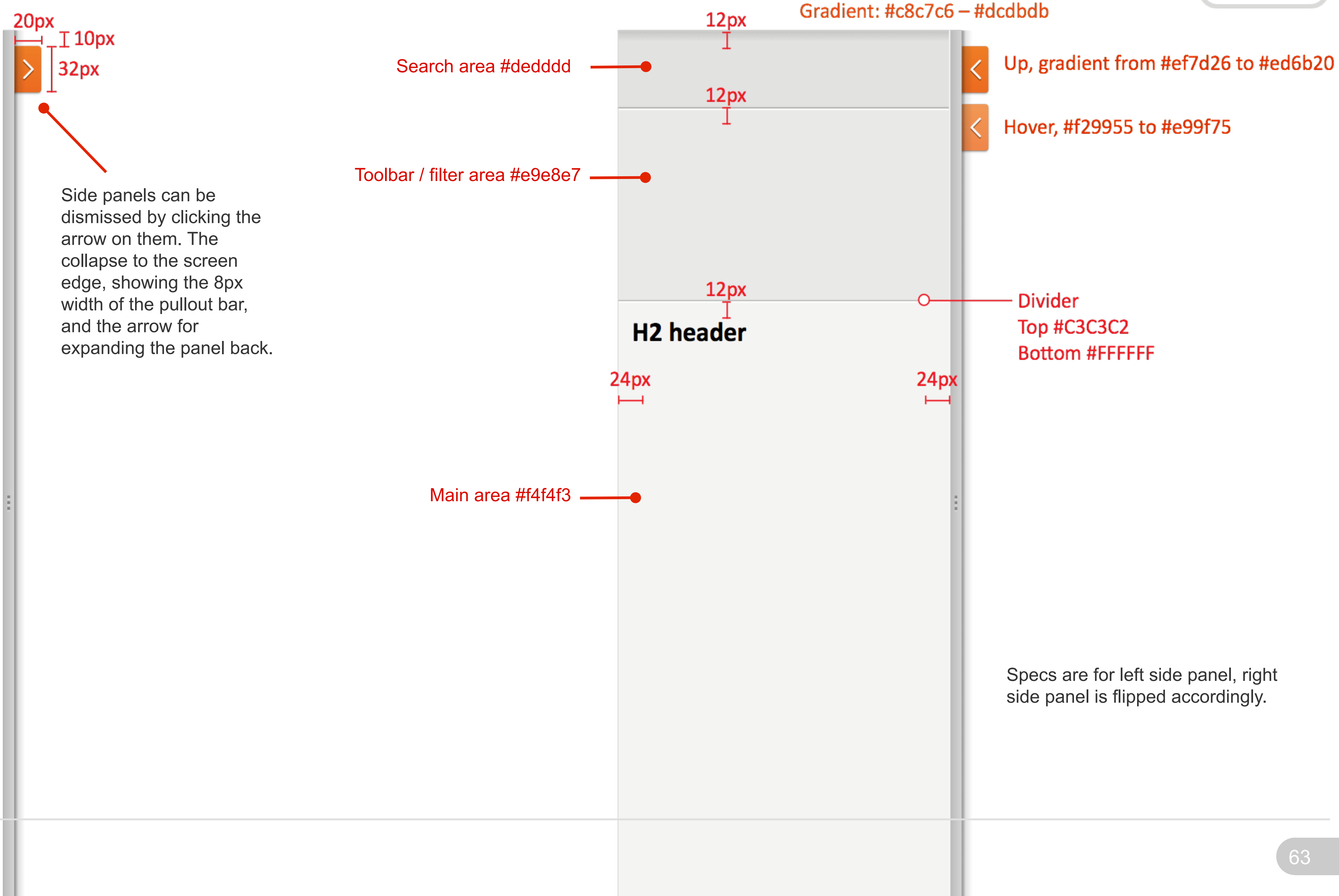
Nib Position

If space is restricting the tooltip from opening to the right of the trigger element, the tooltip can open to the left.

Secondary Components

Side panels

✓ Approved



20px

10px

32px

Gradient: #c8c7c6 – #dcdbdb

12px

Search area #dedddd

12px

Toolbar / filter area #e9e8e7

12px

H2 header

24px

24px

Main area #f4f4f3

Up, gradient from #ef7d26 to #ed6b20

Hover, #f29955 to #e99f75

Divider
Top #C3C3C2
Bottom #FFFFFF

Side panels can be dismissed by clicking the arrow on them. The collapse to the screen edge, showing the 8px width of the pullout bar, and the arrow for expanding the panel back.

Specs are for left side panel, right side panel is flipped accordingly.

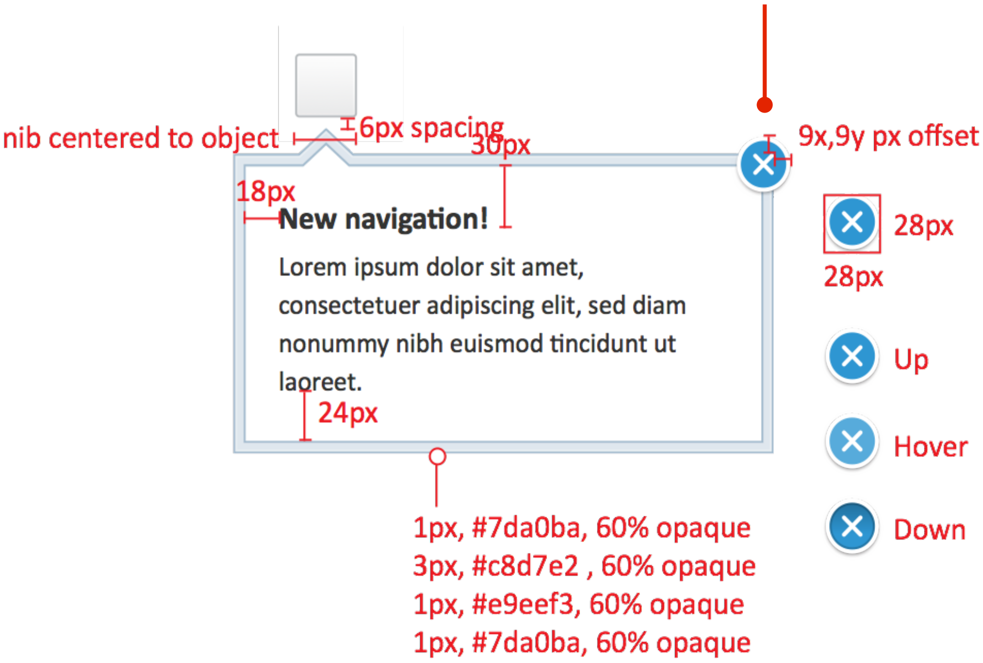
Secondary Components

Generic modeless overlay

✓ Approved

The overlay persists until dismissed from the “x”, or when user opens another overlay, or navigates elsewhere

Nib Position
For all tooltips, the nib is centered to the trigger element with a minimum of 18px spacing from the right or left side of the overlay.



New navigation!

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.

nib centered to object

6px spacing

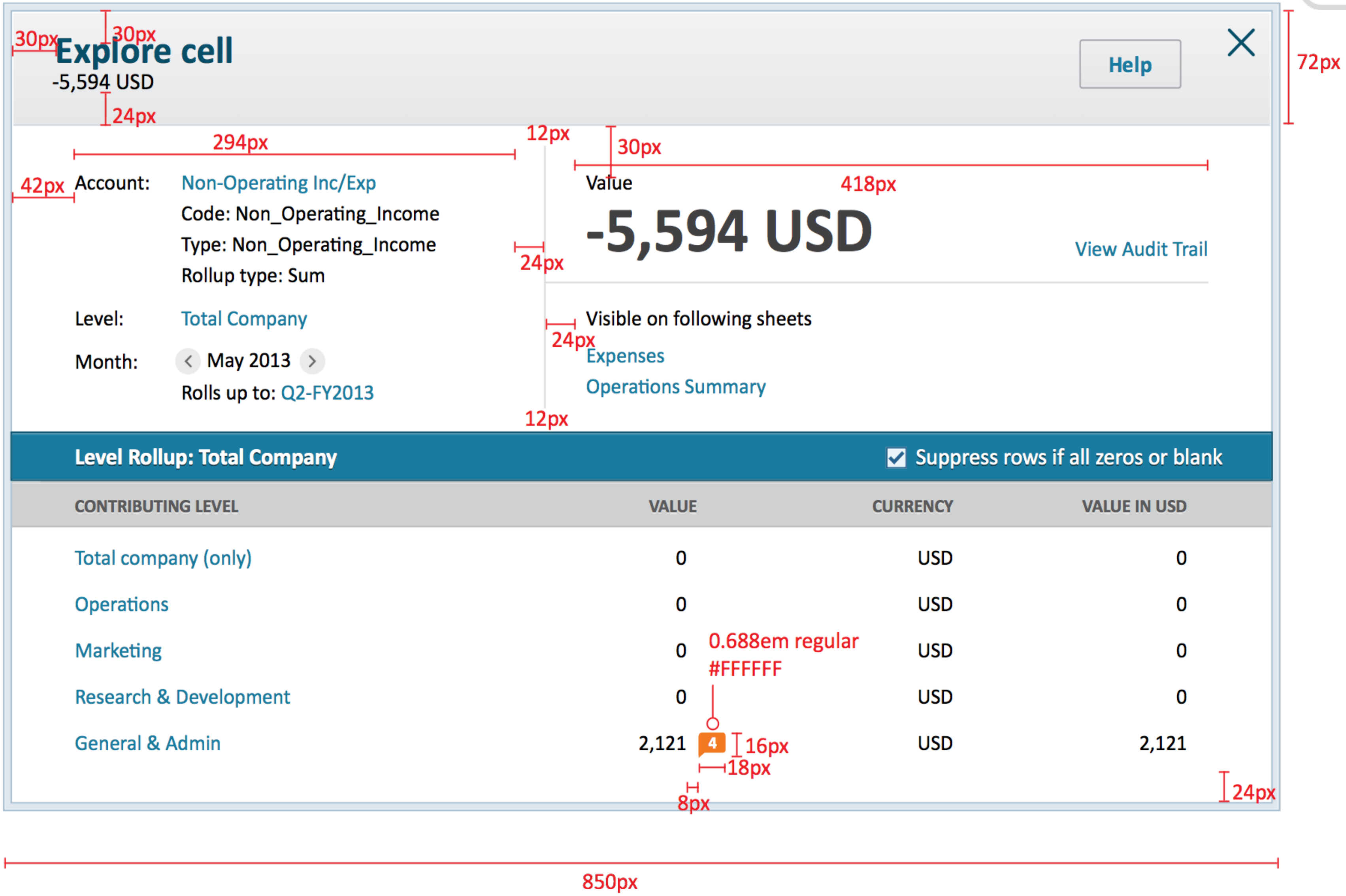
9x,9y px offset

1px, #7da0ba, 60% opaque
3px, #c8d7e2 , 60% opaque
1px, #e9eef3, 60% opaque
1px, #7da0ba, 60% opaque

Secondary Components

Explore cell

Approved



Explore cell

-5,594 USD

Help

Account: Non-Operating Inc/Exp
Code: Non_Operating_Income
Type: Non_Operating_Income
Rollup type: Sum

Level: Total Company

Month: ‹ May 2013 ›
Rolls up to: Q2-FY2013

Value

-5,594 USD

View Audit Trail

Visible on following sheets

Expenses
Operations Summary

Level Rollup: Total Company ☑ Suppress rows if all zeros or blank

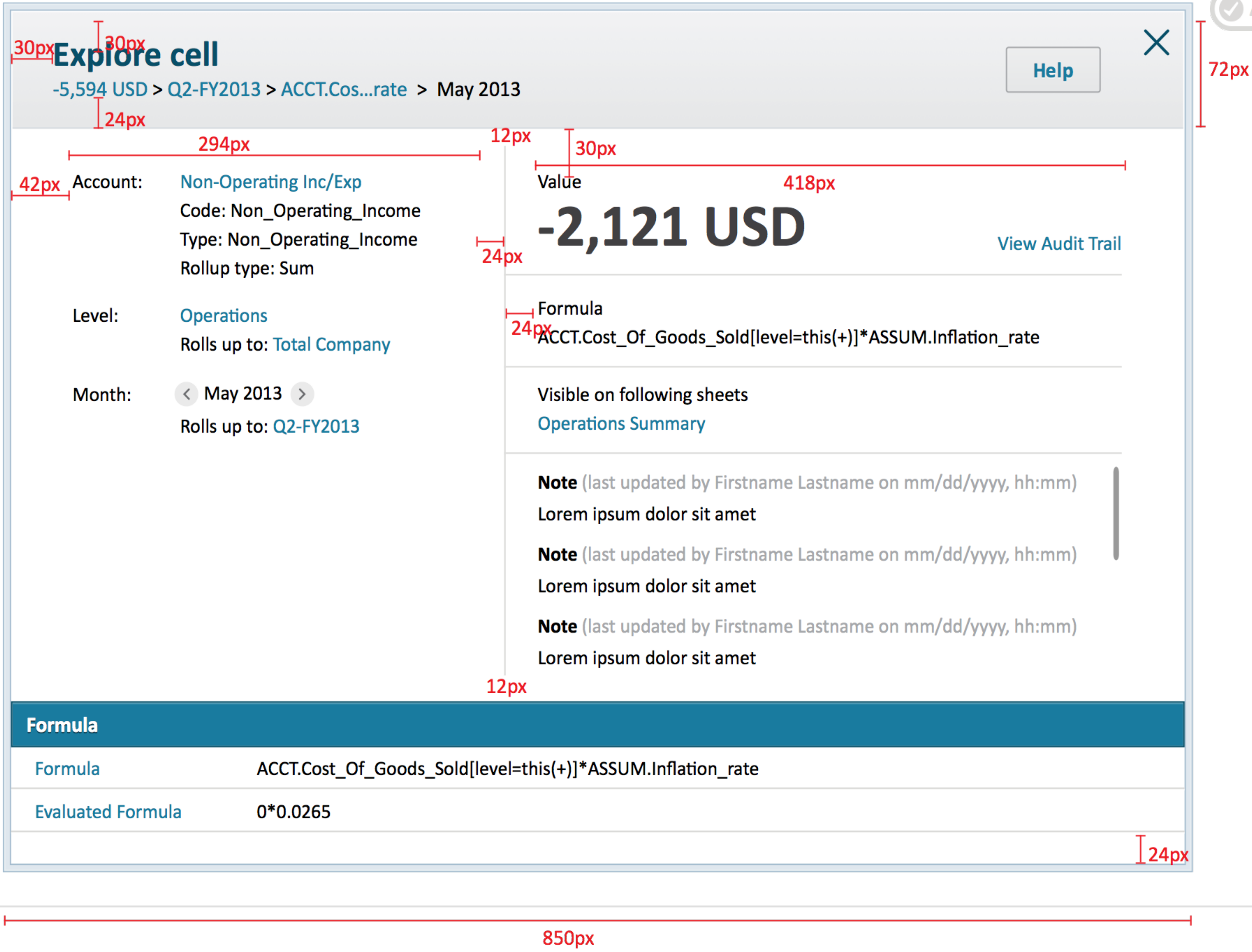
CONTRIBUTING LEVEL	VALUE	CURRENCY	VALUE IN USD
Total company (only)	0	USD	0
Operations	0	USD	0
Marketing	0	USD	0
Research & Development	0	USD	0
General & Admin	2,121 4	USD	2,121

30px
30px
72px
24px
294px
12px
30px
418px
42px
24px
24px
12px
0.688em regular
#FFFFFF
16px
18px
8px
24px
850px

Secondary Components

Explore cell

Approved



Explore cell

-5,594 USD > Q2-FY2013 > ACCT.Cos...rate > May 2013

Account:	Non-Operating Inc/Exp Code: Non_Operating_Income Type: Non_Operating_Income Rollup type: Sum
Level:	Operations Rolls up to: Total Company
Month:	‹ May 2013 › Rolls up to: Q2-FY2013

Value

-2,121 USD

View Audit Trail

Formula

ACCT.Cost_Of_Goods_Sold[level=this(+)]*ASSUM.Inflation_rate

Visible on following sheets

Operations Summary

Note (last updated by Firstname Lastname on mm/dd/yyyy, hh:mm)

Lorem ipsum dolor sit amet

Note (last updated by Firstname Lastname on mm/dd/yyyy, hh:mm)

Lorem ipsum dolor sit amet

Note (last updated by Firstname Lastname on mm/dd/yyyy, hh:mm)

Lorem ipsum dolor sit amet

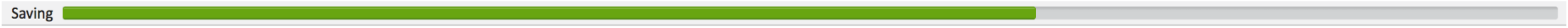
Formula

Formula	ACCT.Cost_Of_Goods_Sold[level=this(+)]*ASSUM.Inflation_rate
Evaluated Formula	0*0.0265

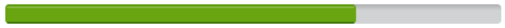
Secondary Components

Loader and spinner widgets

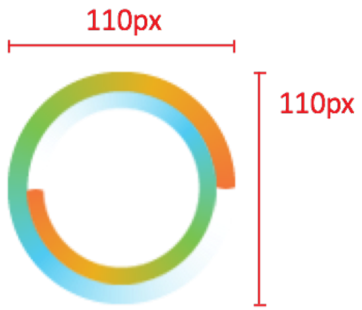
Approved



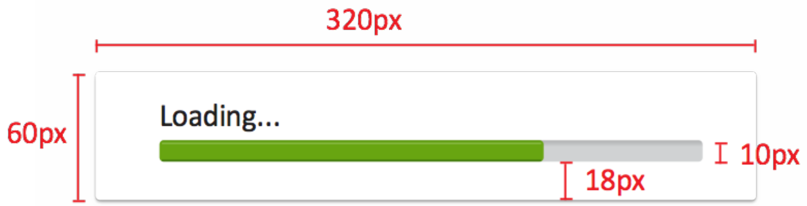
When saving a sheet, show as an element between toolbar and sheet (see following pages). Dismiss as soon as save is complete. Page retains functionality while saving. Minimum time for bar to fill is 200ms (delay if faster).

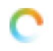


You may use a progress bar inline when progress can be estimated. Minimum width for this is 60px.

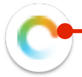


Use full page spinner on loading when there is no reliable estimate on processing. The two circles spin in opposite directions.

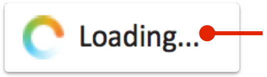




Use smaller spinners in panels and inline when space is more limited. Smallest spinner size is 16x16.



Due to background noise, the spinner may also be placed inside a circle with dropshadow (#000000, 1px, 50%)



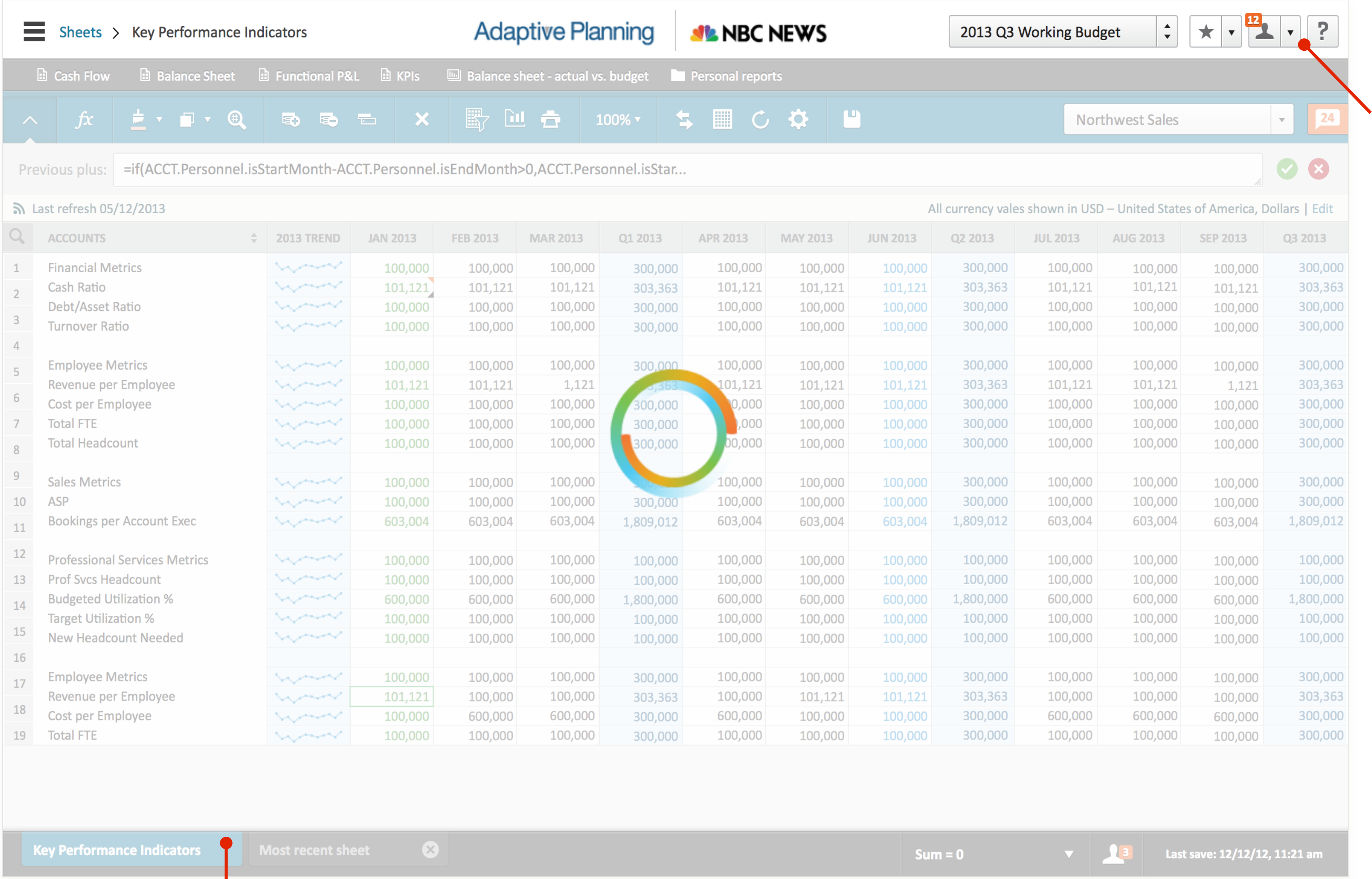
Use in smaller panels (not in full page ones), when content needs loading. Spinner size is 20x20.

Use a full page progress bar, when the processing time can be reliably estimated. No need to show percentage.

Smokescreen 70% #FFFFFF

Secondary Components

Full page loading example



Previous plus: =if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

Last refresh 05/12/2013

All currency vales shown in USD – United States of America, Dollars | Edit

	ACCOUNTS	2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	JUL 2013	AUG 2013	SEP 2013	Q3 2013
1	Financial Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
2	Cash Ratio		101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363
	Debt/Asset Ratio		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
3	Turnover Ratio		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
4														
5	Employee Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
	Revenue per Employee		101,121	101,121	1,121	[illegible]	101,121	101,121	101,121	303,363	101,121	101,121	1,121	303,363
6	Cost per Employee		100,000	100,000	100,000	300,000	[illegible]	100,000	100,000	300,000	100,000	100,000	100,000	300,000
7	Total FTE		100,000	100,000	100,000	300,000	[illegible]	100,000	100,000	300,000	100,000	100,000	100,000	300,000
8	Total Headcount		100,000	100,000	100,000	300,000	[illegible]	100,000	100,000	300,000	100,000	100,000	100,000	300,000
9	Sales Metrics		100,000	100,000	100,000	[illegible]	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
10	ASP		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
11	Bookings per Account Exec		603,004	603,004	603,004	1,809,012	603,004	603,004	603,004	1,809,012	603,004	603,004	603,004	1,809,012
12	Professional Services Metrics		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
13	Prof Svcs Headcount		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
14	Budgeted Utilization %		600,000	600,000	600,000	1,800,000	600,000	600,000	600,000	1,800,000	600,000	600,000	600,000	1,800,000
	Target Utilization %		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
15	New Headcount Needed		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
16														
17	Employee Metrics		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
	Revenue per Employee		101,121	100,000	100,000	303,363	100,000	101,121	101,121	303,363	100,000	100,000	100,000	303,363
18	Cost per Employee		100,000	600,000	600,000	300,000	600,000	100,000	100,000	300,000	600,000	600,000	600,000	300,000
19	Total FTE		100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000

Last save: 12/12/12, 11:21 am

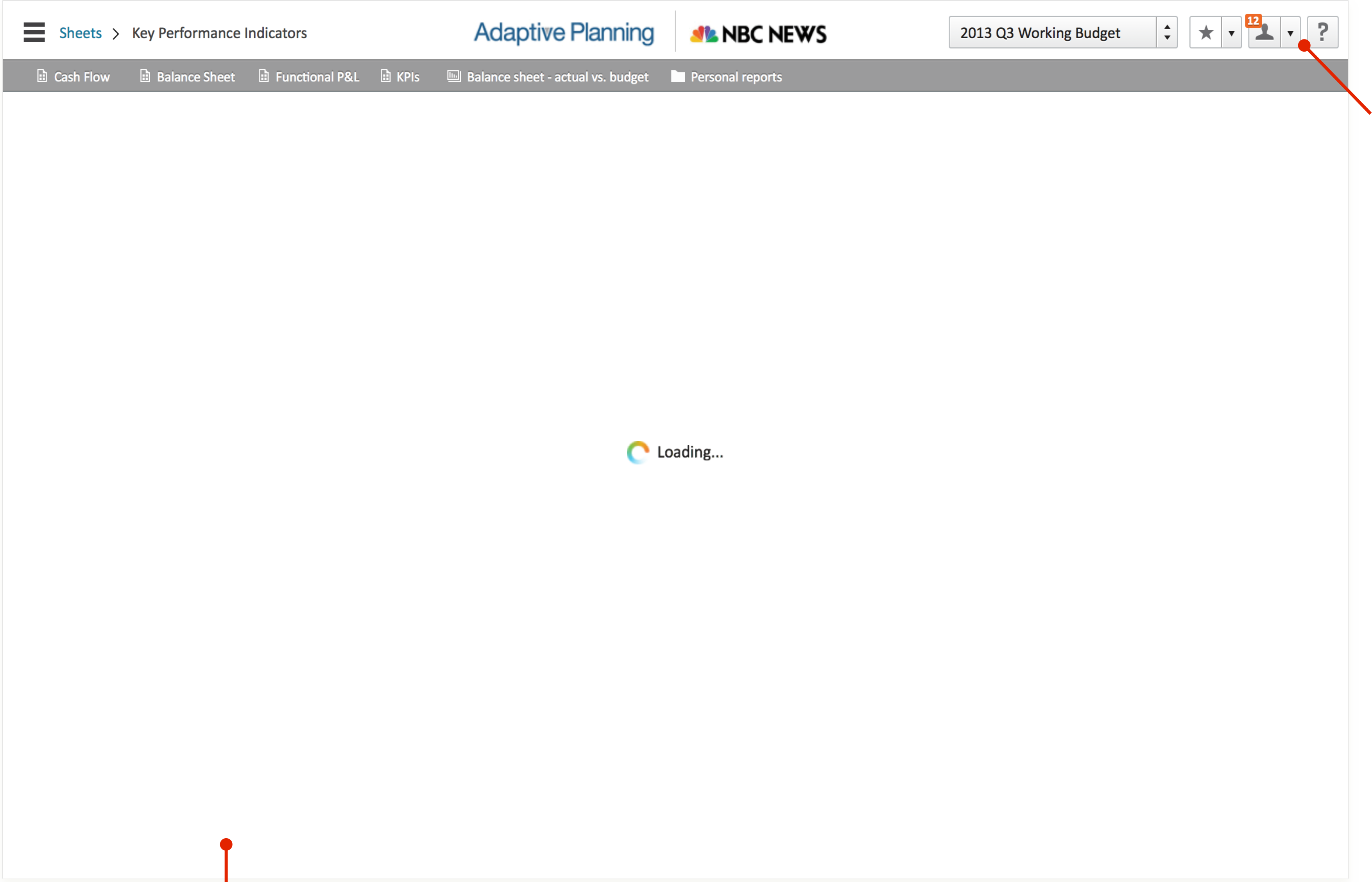
Top area remains functional

Smokescreen 70% #FFFFFF over existing page
or 100% #FFFFFF if loading new page

Secondary Components

Full page loading example

Approved


Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
Loading...

Top area remains functional

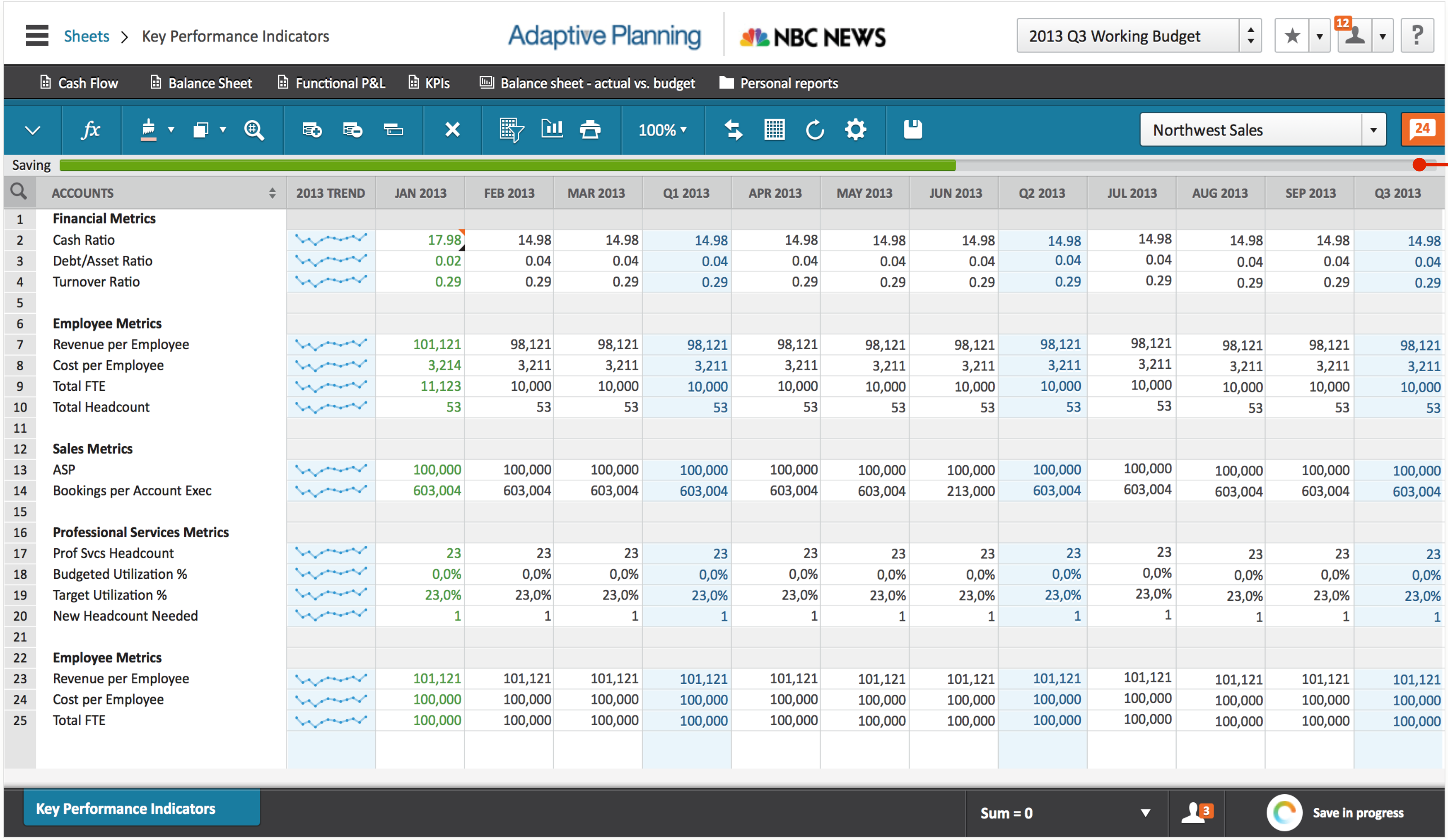
Smokescreen 70% #FFFFFF over existing page
or 100% #FFFFFF if loading new page

Secondary Components

Sheet saving, saved

Adaptive Insight

✓ Approved



Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Northwest Sales
24
Saving

	ACCOUNTS	2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	JUL 2013	AUG 2013	SEP 2013	Q3 2013
1	**Financial Metrics**													
2	Cash Ratio		17.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98
3	Debt/Asset Ratio		0.02	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04
4	Turnover Ratio		0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29
5														
6	**Employee Metrics**													
7	Revenue per Employee		101,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121
8	Cost per Employee		3,214	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211
9	Total FTE		11,123	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
10	Total Headcount		53	53	53	53	53	53	53	53	53	53	53	53
11														
12	**Sales Metrics**													
13	ASP		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
14	Bookings per Account Exec		603,004	603,004	603,004	603,004	603,004	603,004	213,000	603,004	603,004	603,004	603,004	603,004
15														
16	**Professional Services Metrics**													
17	Prof Svcs Headcount		23	23	23	23	23	23	23	23	23	23	23	23
18	Budgeted Utilization %		0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
19	Target Utilization %		23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%
20	New Headcount Needed		1	1	1	1	1	1	1	1	1	1	1	1
21														
22	**Employee Metrics**													
23	Revenue per Employee		101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121
24	Cost per Employee		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
25	Total FTE		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000

Key Performance Indicators
Sum = 0
3
Save in progress

As soon as user presses "save", a "saving" progress bar drops down between toolbar and content (part of toolbar, so doesn't scroll).

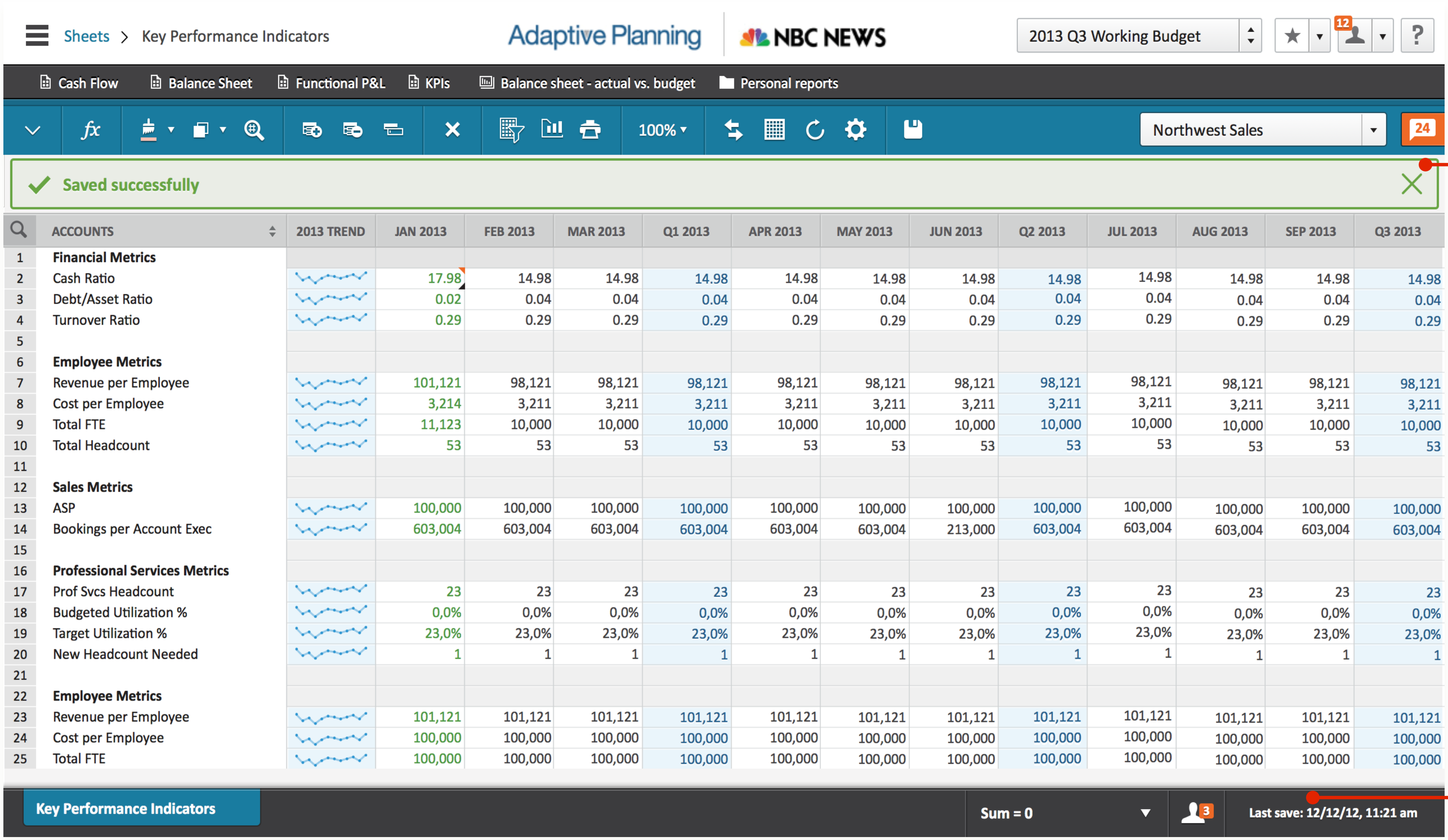
Sheet remains functional, but further changes are not saved.

If technically difficult, this can be substituted with an overlay.

Secondary Components

Sheet saving, saved

Approved



Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Northwest Sales
24
Key Performance Indicators
Sum = 0
3

✓ Saved successfully

	ACCOUNTS	2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	JUL 2013	AUG 2013	SEP 2013	Q3 2013
1	**Financial Metrics**													
2	Cash Ratio		17.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98
3	Debt/Asset Ratio		0.02	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04
4	Turnover Ratio		0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29
5														
6	**Employee Metrics**													
7	Revenue per Employee		101,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121
8	Cost per Employee		3,214	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211
9	Total FTE		11,123	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
10	Total Headcount		53	53	53	53	53	53	53	53	53	53	53	53
11														
12	**Sales Metrics**													
13	ASP		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
14	Bookings per Account Exec		603,004	603,004	603,004	603,004	603,004	603,004	213,000	603,004	603,004	603,004	603,004	603,004
15														
16	**Professional Services Metrics**													
17	Prof Svcs Headcount		23	23	23	23	23	23	23	23	23	23	23	23
18	Budgeted Utilization %		0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
19	Target Utilization %		23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%
20	New Headcount Needed		1	1	1	1	1	1	1	1	1	1	1	1
21														
22	**Employee Metrics**													
23	Revenue per Employee		101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121
24	Cost per Employee		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
25	Total FTE		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000

Last save: 12/12/12, 11:21 am

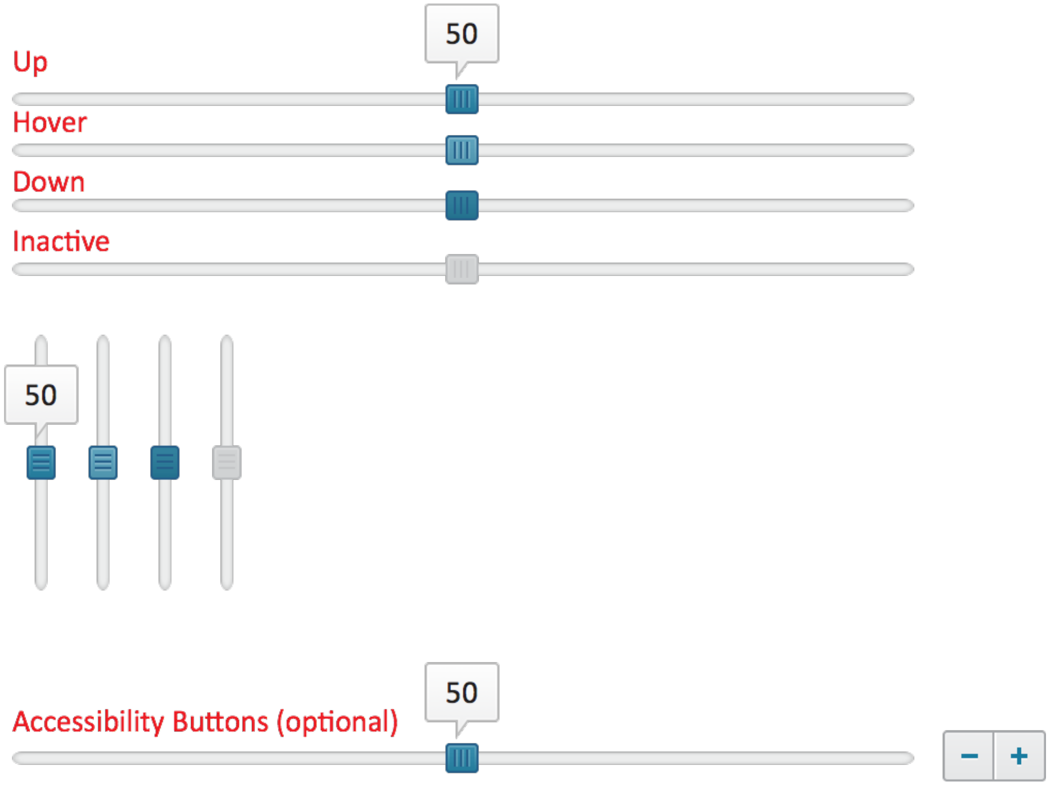
When save is complete, the progress bar is substituted with a in page notification. This persists unless dismissed, or a new save is made.

Save time is also updated here.

Secondary Components

Slider widget

✓ Approved

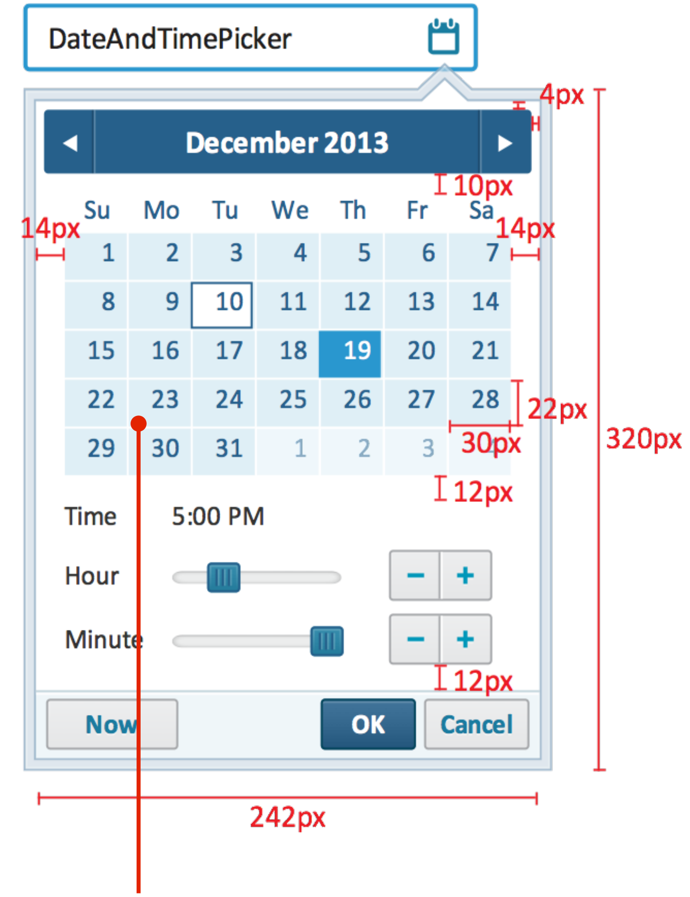

50
Up
Hover
Down
Inactive
50
50
Accessibility Buttons (optional)
−
+

Accessibility buttons next to widget for users without click/ drag ability.

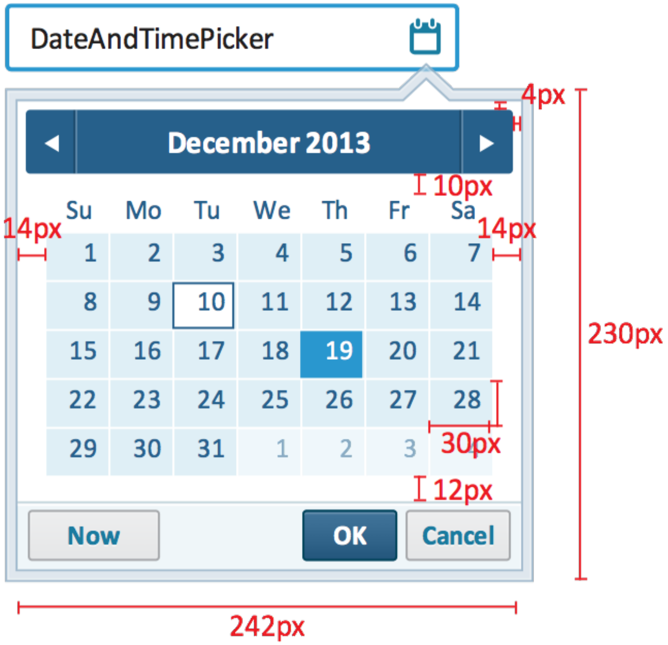
Secondary Components

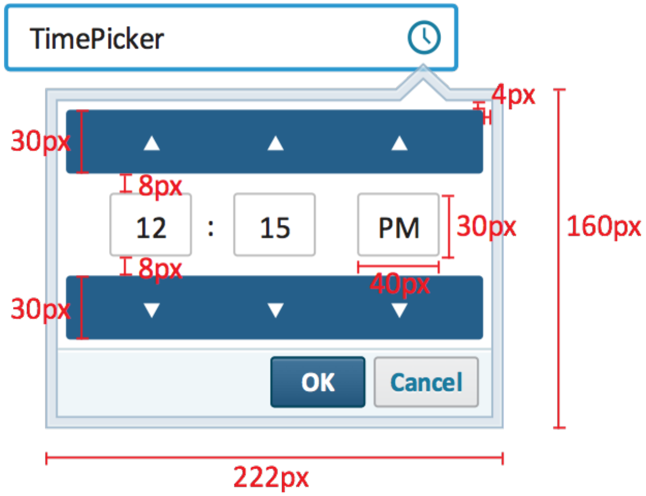
Date & time pickers

Approved


DateAndTimePicker
December 2013
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3
Time
5:00 PM
Hour
Minute
Now
OK
Cancel
4px
10px
14px
14px
22px
30px
12px
12px
320px
242px

1px border between in date widgets


DateAndTimePicker
December 2013
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3
Now
OK
Cancel
4px
10px
14px
14px
30px
12px
230px
242px

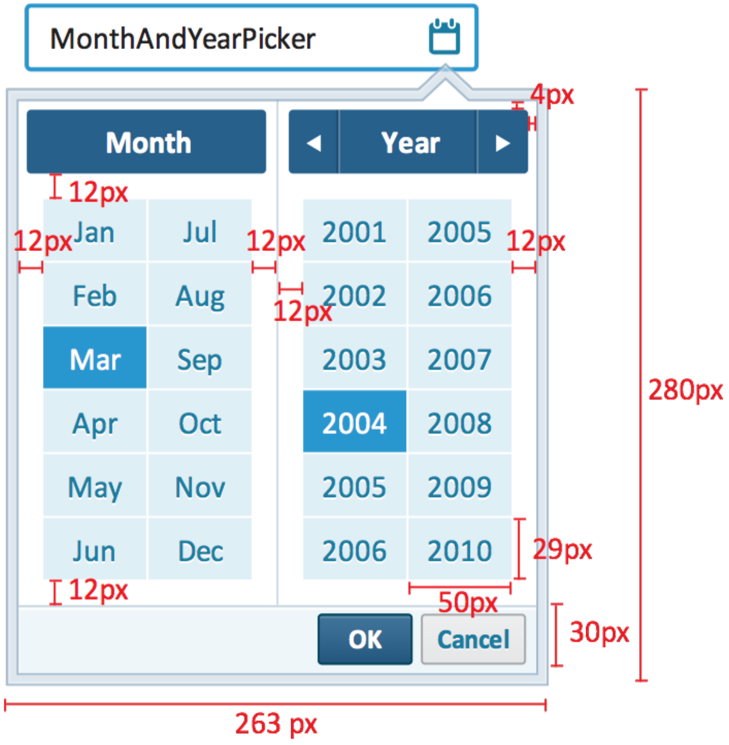

TimePicker
12
:
15
PM
OK
Cancel
4px
30px
8px
30px
8px
40px
30px
160px
222px

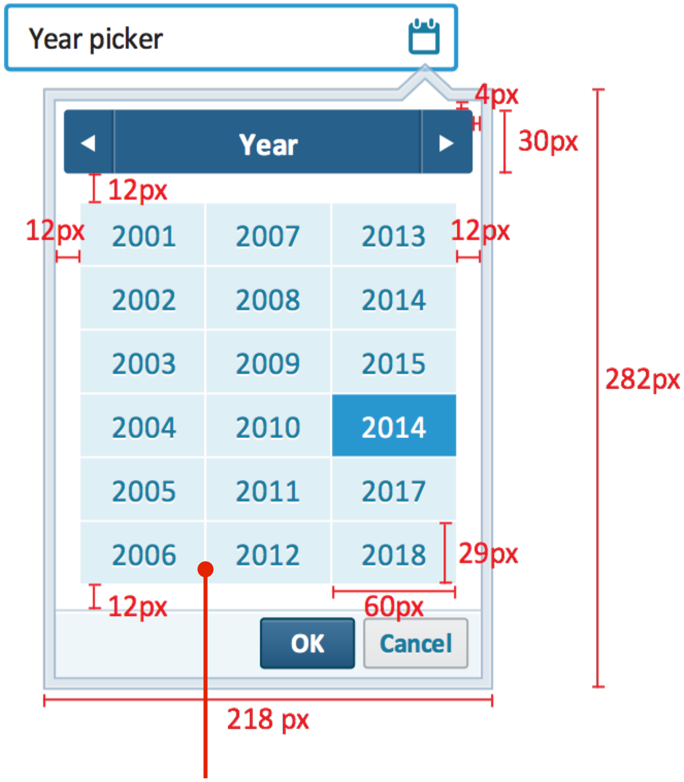
10	Today, 1px border #26618C
19	Selected, #2896CE
31	Not Selected, #92C9DF
1	Previous or next month 50% opacity, #92C9DF

Secondary Components

Date & time pickers

Approved


MonthAndYearPicker
Month
Year
Jan
Jul
Feb
Aug
Mar
Sep
Apr
Oct
May
Nov
Jun
Dec
2001
2005
2002
2006
2003
2007
2004
2008
2005
2009
2006
2010
OK
Cancel
4px
12px
12px
12px
12px
12px
12px
29px
50px
30px
280px
263 px


Year picker
Year
2001
2007
2013
2002
2008
2014
2003
2009
2015
2004
2010
2014
2005
2011
2017
2006
2012
2018
OK
Cancel
4px
30px
12px
12px
12px
12px
29px
60px
282px
218 px

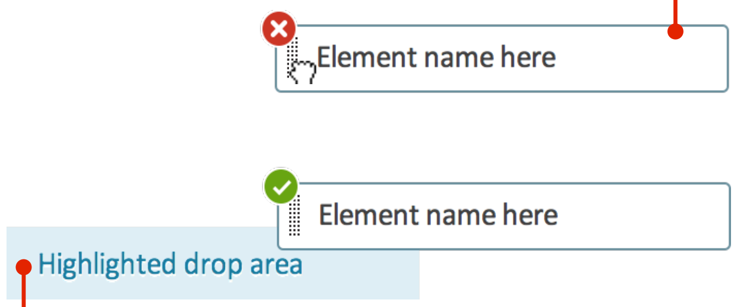
1px border between
in date widgets

Secondary Components

Dragging & dropping

✓ Approved

Create a token when element is being dragged. The token should have the same title as the element.


Element name here
Element name here
Highlighted drop area

As dragged element touches droppable areas, the red invalid drag target indicator turns into a valid green check.

Droppable areas should be highlighted with a color, or if already colored, use the same highlight as you’d use with a hover.

Grid accordion and tree structure

Approved

30px gutter

30px gutter

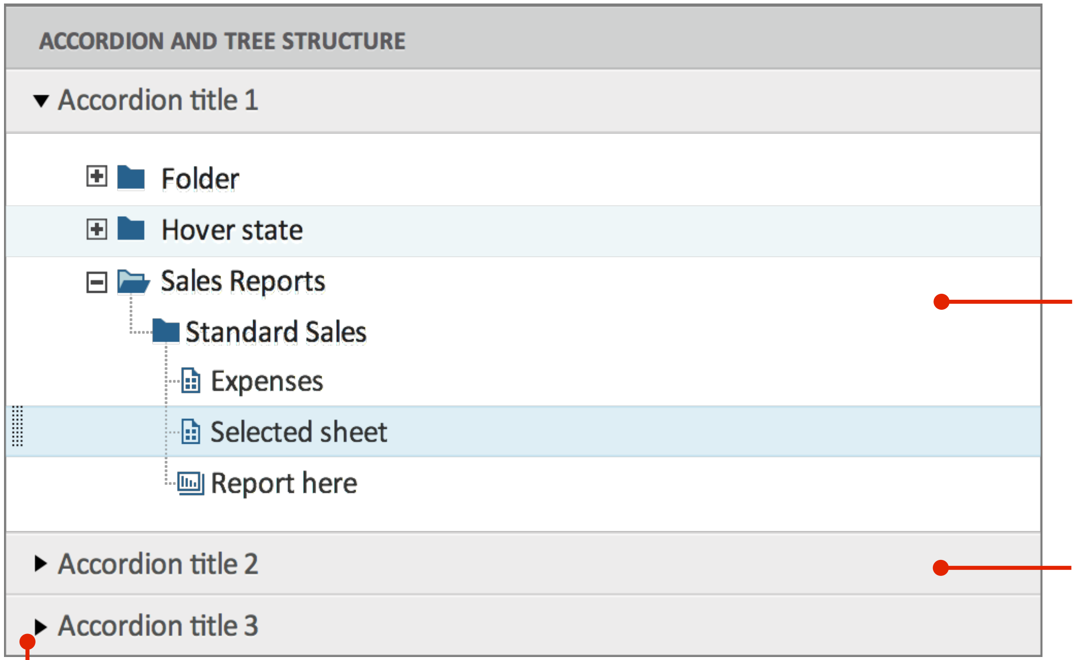
30px

30px

Line height 24px
Font size 15px

Drag and drop handle shows on hover. Change to a hand pointer when hovering over the drag'n'drop marker. Change on drag.

30px



ACCORDION AND TREE STRUCTURE

▼ Accordion title 1

- ⊞ Folder
- ⊞ Hover state
- ⊟ Sales Reports
  - Standard Sales
    - Expenses
    - Selected sheet
    - Report here

▶ Accordion title 2

▶ Accordion title 3

Long names: If a folder or filename doesn't fit into the width, make it flow to two rows, then truncate with ellipses. Use leading 15px.

Animation
Accordion panel and tree structure slides down and up accordingly. Refer to Ext JS 4 theme for behavior.

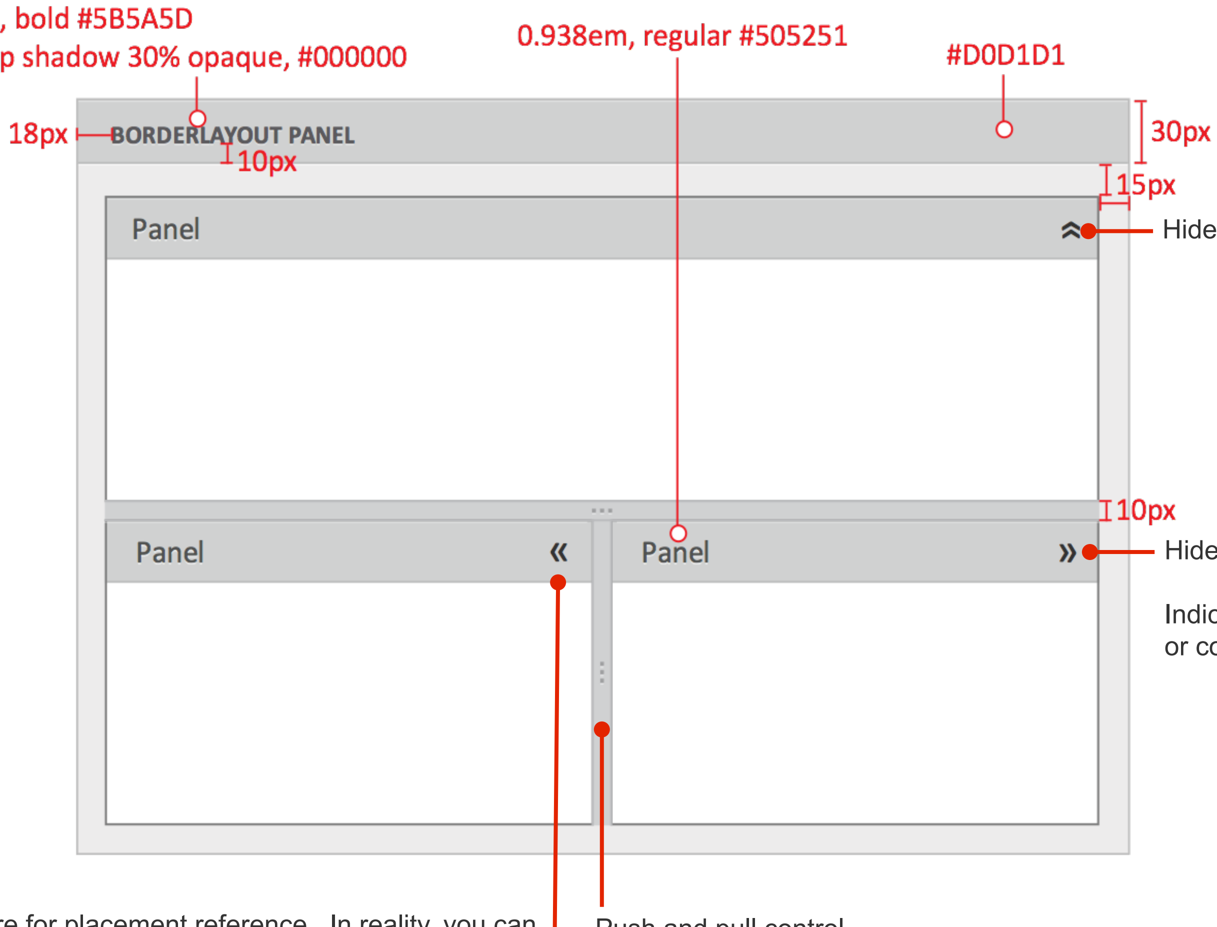
12px indent on levels

Show expand collapse here

Secondary Components

Borderlayout panel

Approved


0.75em, bold #5B5A5D
1px drop shadow 30% opaque, #000000
0.938em, regular #505251
#D0D1D1
18px
BORDERLAYOUT PANEL
10px
30px
15px
Panel
10px
Panel
Panel

Hide panel to top control

Hide panel to right

Indicators flip accordingly to expand or collapse state

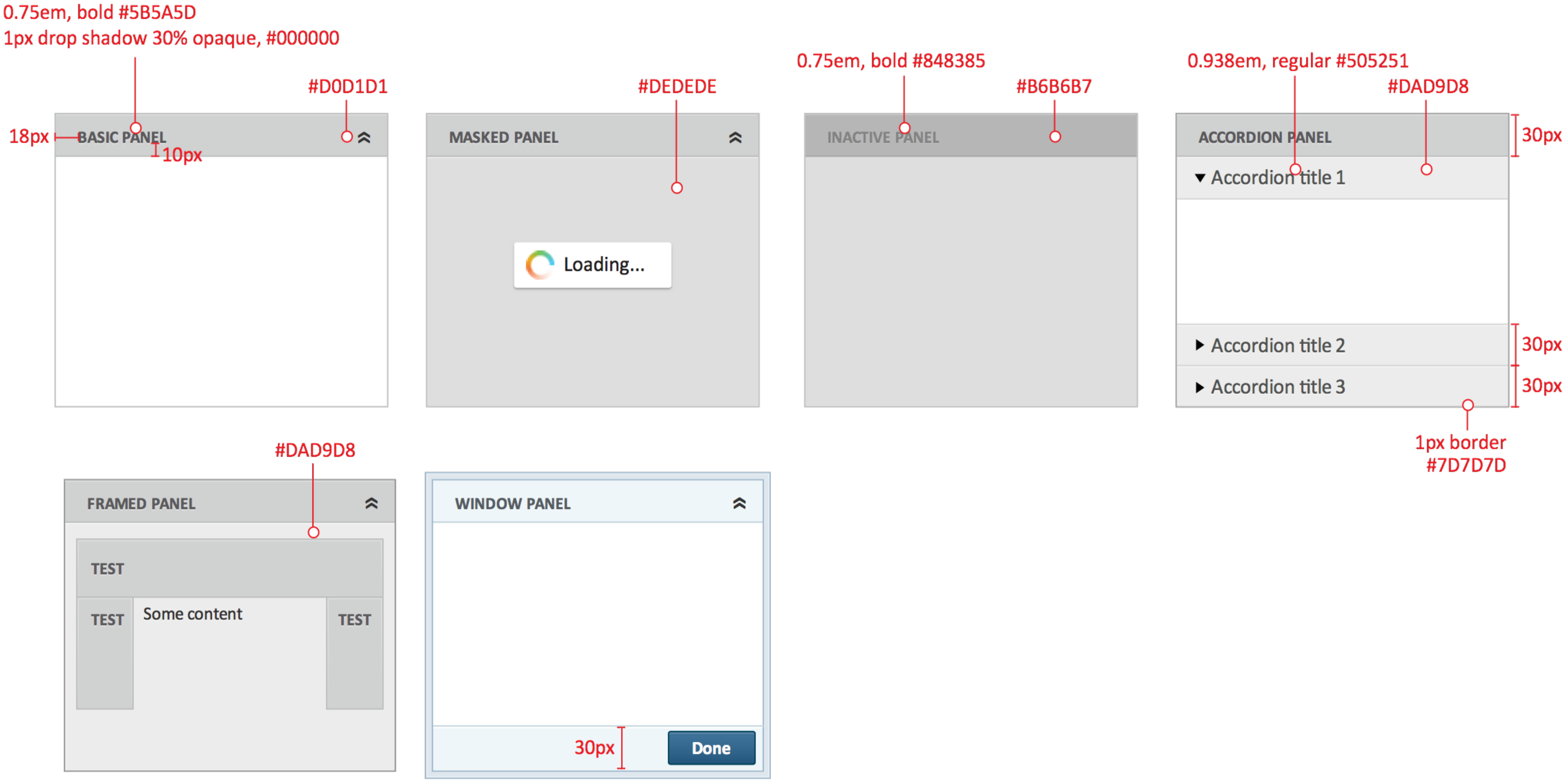
Shown here for placement reference. In reality, you can not collapse two adjacent panels in opposite directions. So only the left or the right should have this widget.

Push and pull control

Secondary Components

Panels

Approved



0.75em, bold #5B5A5D
1px drop shadow 30% opaque, #000000

#D0D1D1

18px

10px

#DEDEDE

0.75em, bold #848385

#B6B6B7

0.938em, regular #505251

#DAD9D8

30px

30px

30px

1px border
#7D7D7D

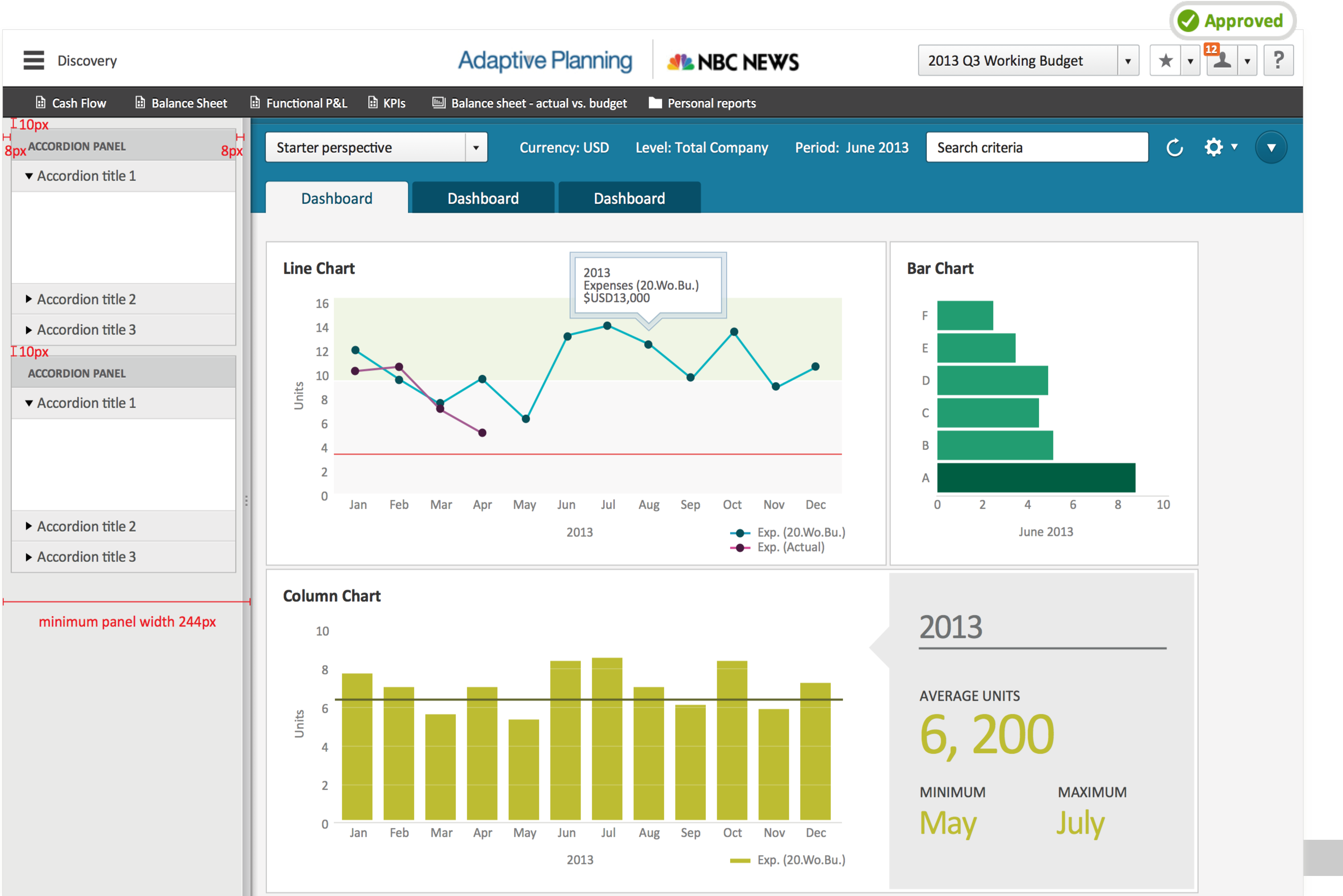
#DAD9D8

30px

BASIC PANEL
MASKED PANEL
Loading...
INACTIVE PANEL
ACCORDION PANEL
Accordion title 1
Accordion title 2
Accordion title 3
FRAMED PANEL
TEST
TEST
Some content
TEST
WINDOW PANEL
Done

Secondary Components

Example of panels on page


Approved
Discovery
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
ACCORDION PANEL
Accordion title 1
Accordion title 2
Accordion title 3
ACCORDION PANEL
Accordion title 1
Accordion title 2
Accordion title 3
Starter perspective
Currency: USD
Level: Total Company
Period: June 2013
Search criteria
Dashboard
Dashboard
Dashboard
Line Chart
2013
Expenses (20.Wo.Bu.)
$USD13,000
16
14
12
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
Exp. (Actual)
Bar Chart
F
E
D
C
B
A
0
2
4
6
8
10
June 2013
Column Chart
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
2013
AVERAGE UNITS
6, 200
MINIMUM
May
MAXIMUM
July

10px

8px

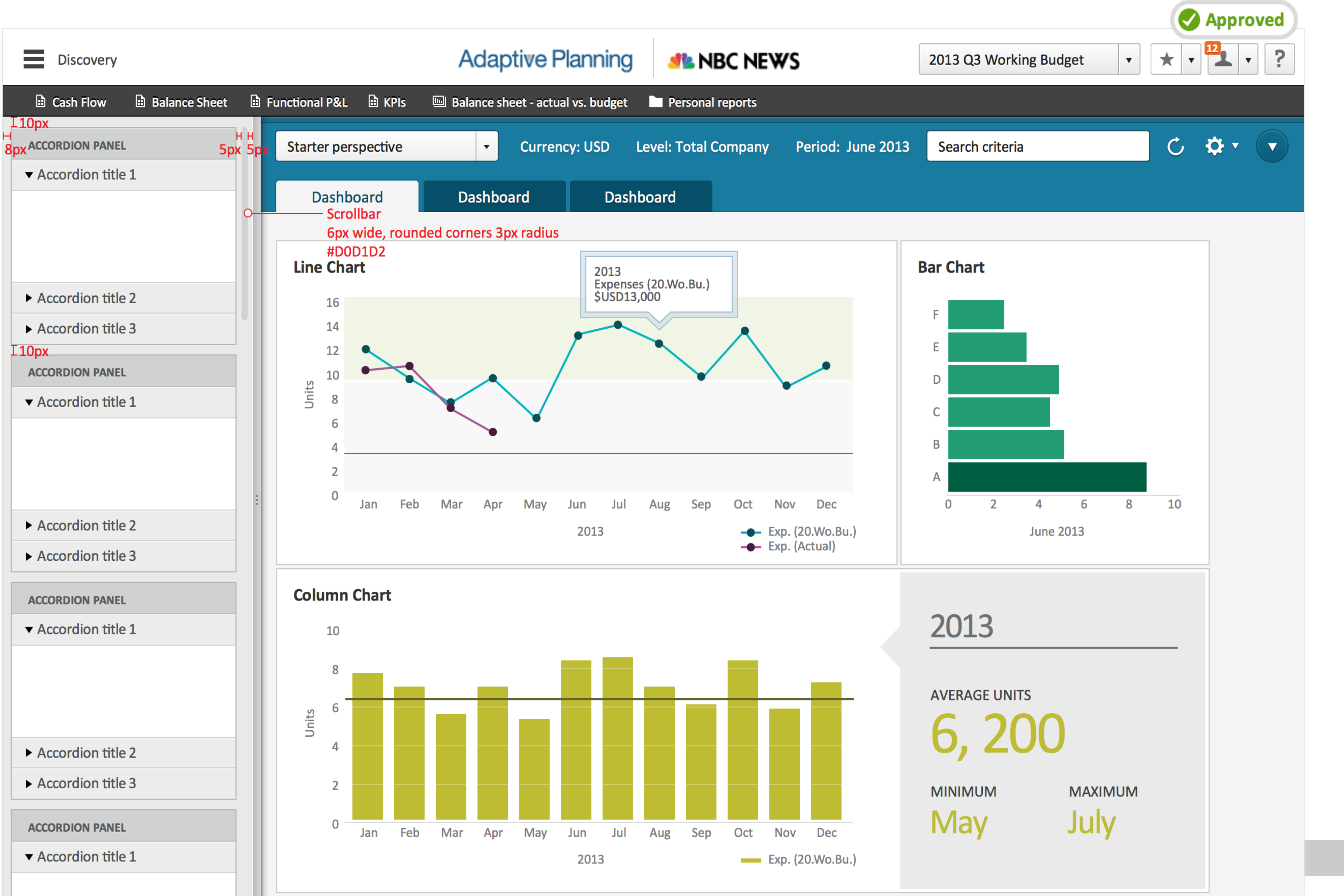
8px

10px

minimum panel width 244px

Secondary Components

Example of panels on page with scrollbar


Approved
Discovery
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
ACCORDION PANEL
Accordion title 1
Accordion title 2
Accordion title 3
ACCORDION PANEL
Accordion title 1
Accordion title 2
Accordion title 3
ACCORDION PANEL
Accordion title 1
Accordion title 2
Accordion title 3
ACCORDION PANEL
Accordion title 1
Starter perspective
Currency: USD
Level: Total Company
Period: June 2013
Search criteria
Dashboard
Dashboard
Dashboard
Line Chart
2013
Expenses (20.Wo.Bu.)
$USD13,000
16
14
12
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
Exp. (Actual)
Bar Chart
F
E
D
C
B
A
0
2
4
6
8
10
June 2013
Column Chart
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
2013
AVERAGE UNITS
6, 200
MINIMUM
May
MAXIMUM
July

10px

8px

5px 5px

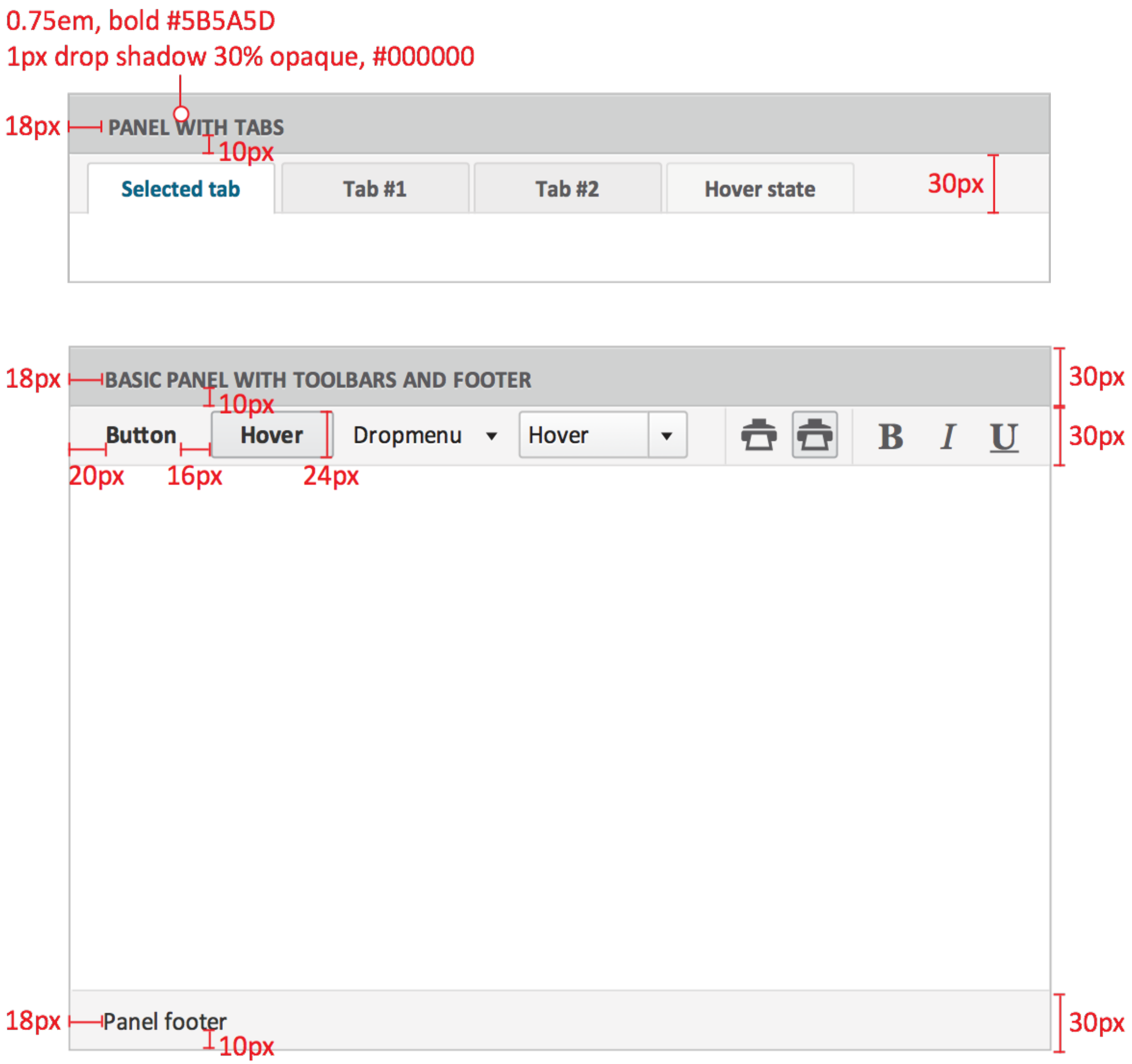
Scrollbar
6px wide, rounded corners 3px radius
#D0D1D2

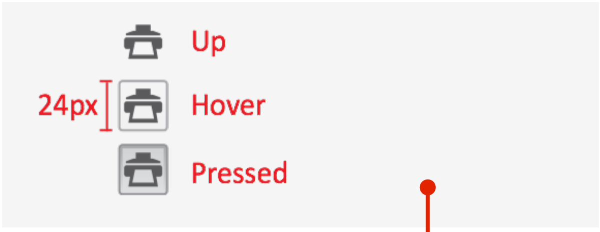
10px

Secondary Components

Panel toolbars

Approved


0.75em, bold #5B5A5D
1px drop shadow 30% opaque, #000000
18px
PANEL WITH TABS
10px
Selected tab
Tab #1
Tab #2
Hover state
30px
18px
BASIC PANEL WITH TOOLBARS AND FOOTER
10px
30px
Button
Hover
Dropmenu
Hover
B
I
U
30px
20px
16px
24px
18px
Panel footer
10px
30px


Up
24px
Hover
Pressed

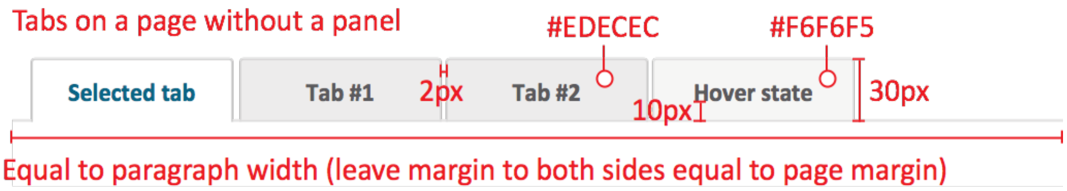
Hover states for panel toolbars are similar to sheet toolbar. Show icons first, button outline on hover, and button pressed down state on press.

See button specifications on generic components.

Secondary Components

Tabs

Approved


Tabs on a page without a panel
#EDECEC
#F6F6F5
Selected tab
Tab #1
2px
Tab #2
10px
Hover state
30px
Equal to paragraph width (leave margin to both sides equal to page margin)

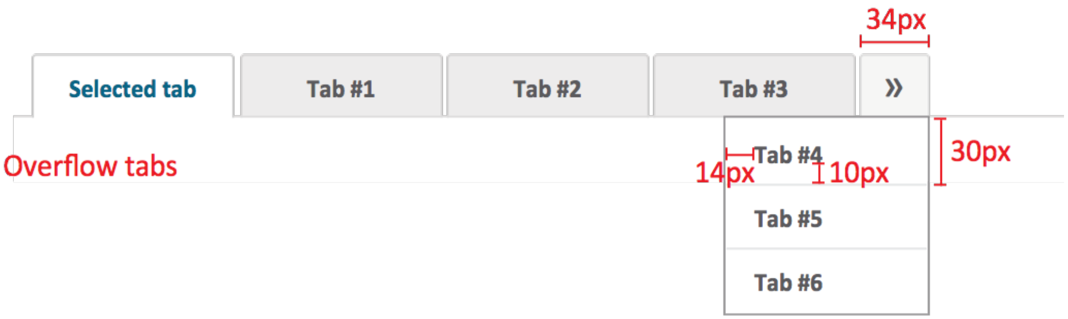

34px
Selected tab
Tab #1
Tab #2
Tab #3
»
Overflow tabs
14px
Tab #4
10px
30px
Tab #5
Tab #6

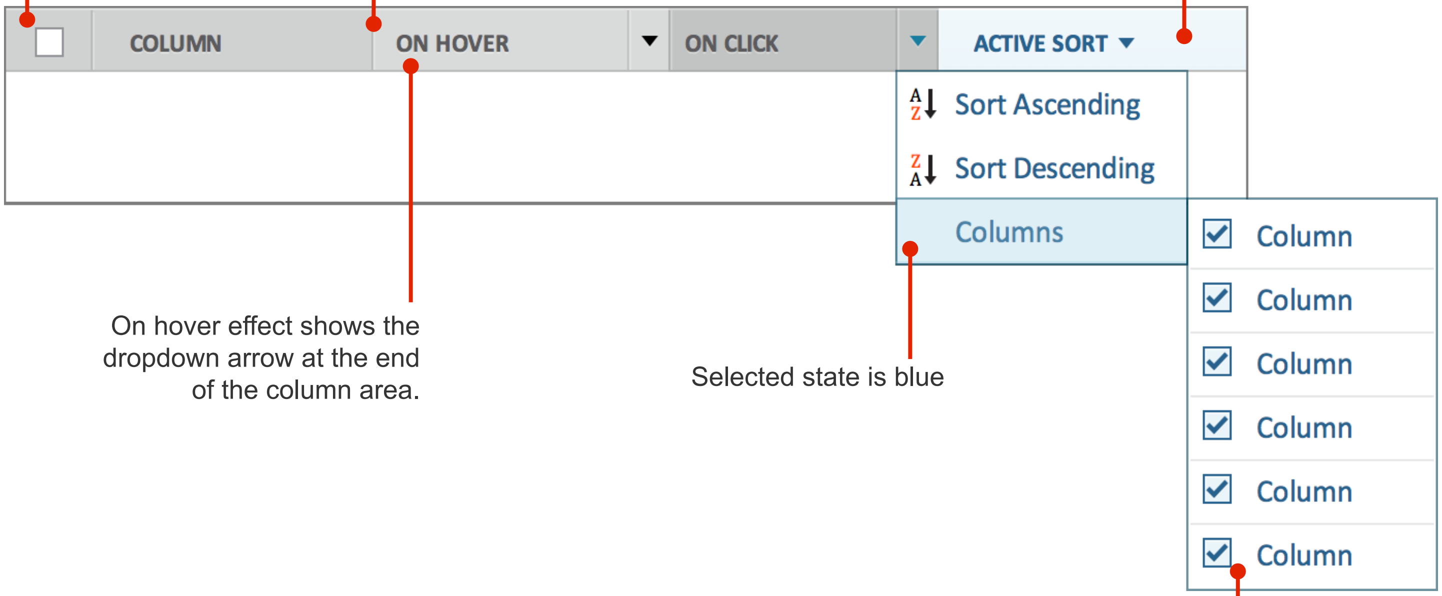
Table grid column headers

Approved

Quick select all / none

Resize column width with drag and drop. Change cursor to reflect functionality.

This column header has an active sort in it. Click to switch through sort type, in this case asc/desc


☐
COLUMN
ON HOVER
ON CLICK
ACTIVE SORT
Sort Ascending
Sort Descending
Columns
☑ Column
☑ Column
☑ Column
☑ Column
☑ Column
☑ Column

On hover effect shows the dropdown arrow at the end of the column area.

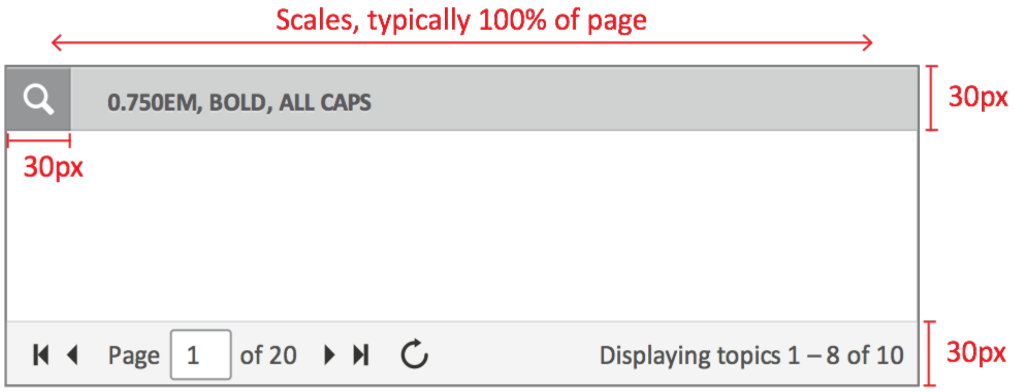
Selected state is blue

Control which columns to show

Secondary Components

Grid footer and search

Approved

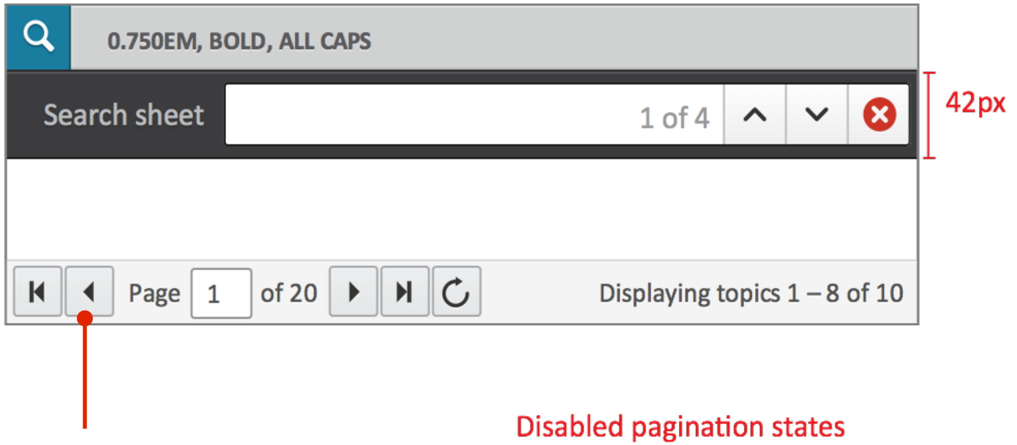

0.750EM, BOLD, ALL CAPS
Page
1
of 20
Displaying topics 1 – 8 of 10

Scales, typically 100% of page

30px

30px

30px

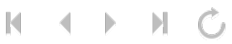

0.750EM, BOLD, ALL CAPS
Search sheet
1 of 4
Page
1
of 20
Displaying topics 1 – 8 of 10

42px

Search bar pushes content down as it appears (would be feasible to use an overlay too if that's technically easier. It persists unless dismissed from "x" or from magnifying glass-button.

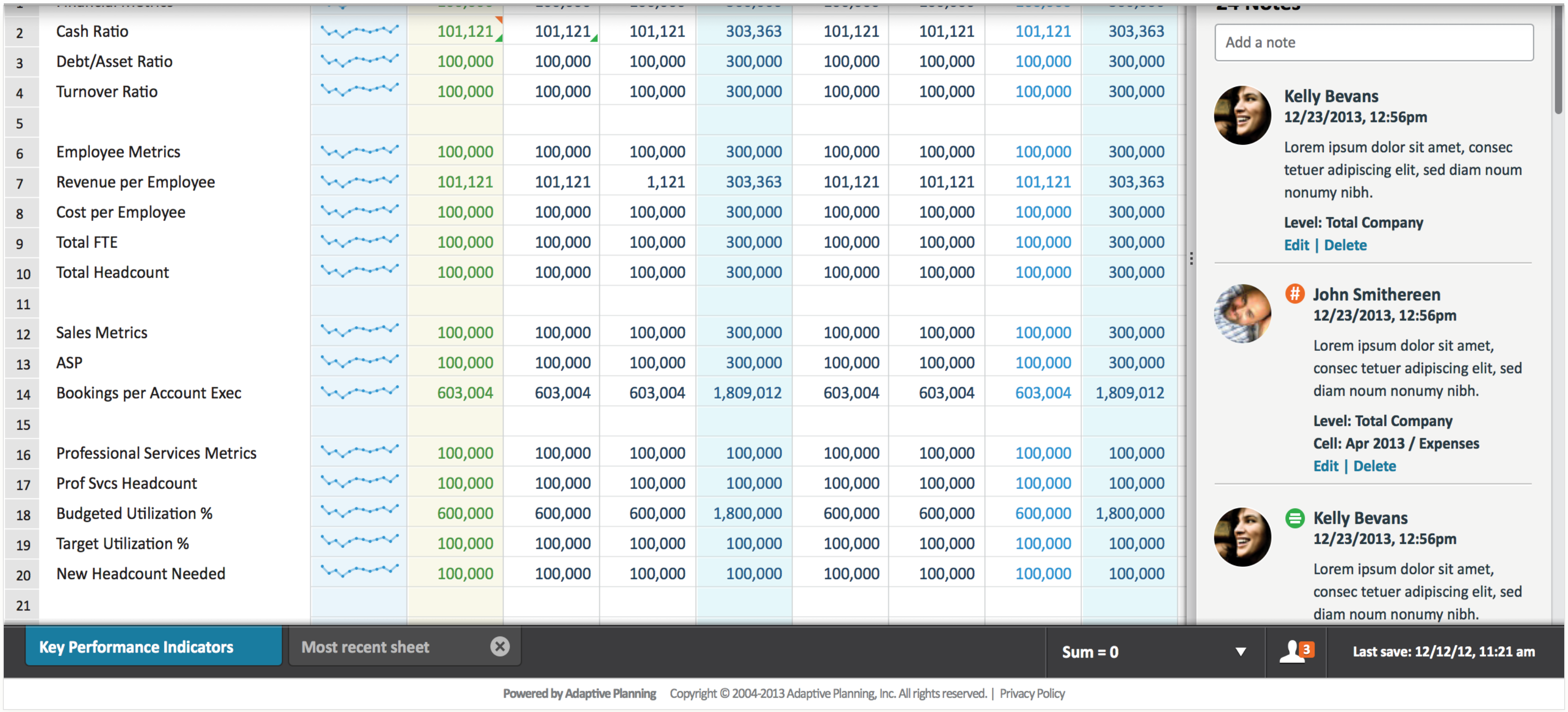
Hover states for buttons

Disabled pagination states



Global footer

Approved



2	Cash Ratio	101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363
3	Debt/Asset Ratio	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
4	Turnover Ratio	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
5									
6	Employee Metrics	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
7	Revenue per Employee	101,121	101,121	1,121	303,363	101,121	101,121	101,121	303,363
8	Cost per Employee	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
9	Total FTE	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
10	Total Headcount	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
11									
12	Sales Metrics	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
13	ASP	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000
14	Bookings per Account Exec	603,004	603,004	603,004	1,809,012	603,004	603,004	603,004	1,809,012
15									
16	Professional Services Metrics	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
17	Prof Svcs Headcount	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
18	Budgeted Utilization %	600,000	600,000	600,000	1,800,000	600,000	600,000	600,000	1,800,000
19	Target Utilization %	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
20	New Headcount Needed	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
21									

Add a note

Kelly Bevans
12/23/2013, 12:56pm

Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.

Level: Total Company
Edit | Delete

John Smithereen
12/23/2013, 12:56pm

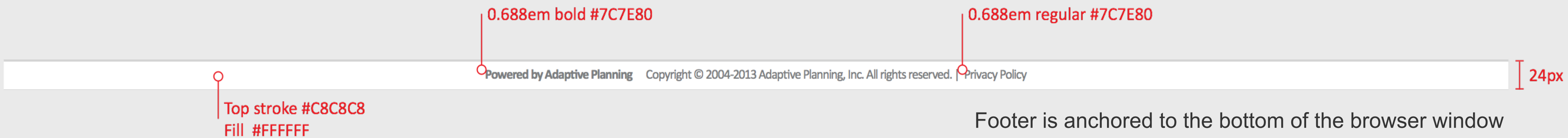
Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.

Level: Total Company
Cell: Apr 2013 / Expenses
Edit | Delete

Kelly Bevans
12/23/2013, 12:56pm

Lorem ipsum dolor sit amet, consec tetuer adipiscing elit, sed diam noum nonumy nibh.

Powered by Adaptive Planning Copyright © 2004-2013 Adaptive Planning, Inc. All rights reserved. | Privacy Policy



0.688em bold #7C7E80

0.688em regular #7C7E80

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24px

Top stroke #C8C8C8
Fill #FFFFFF

Footer is anchored to the bottom of the browser window and is a separate element from the rest of the screen

Secondary Components

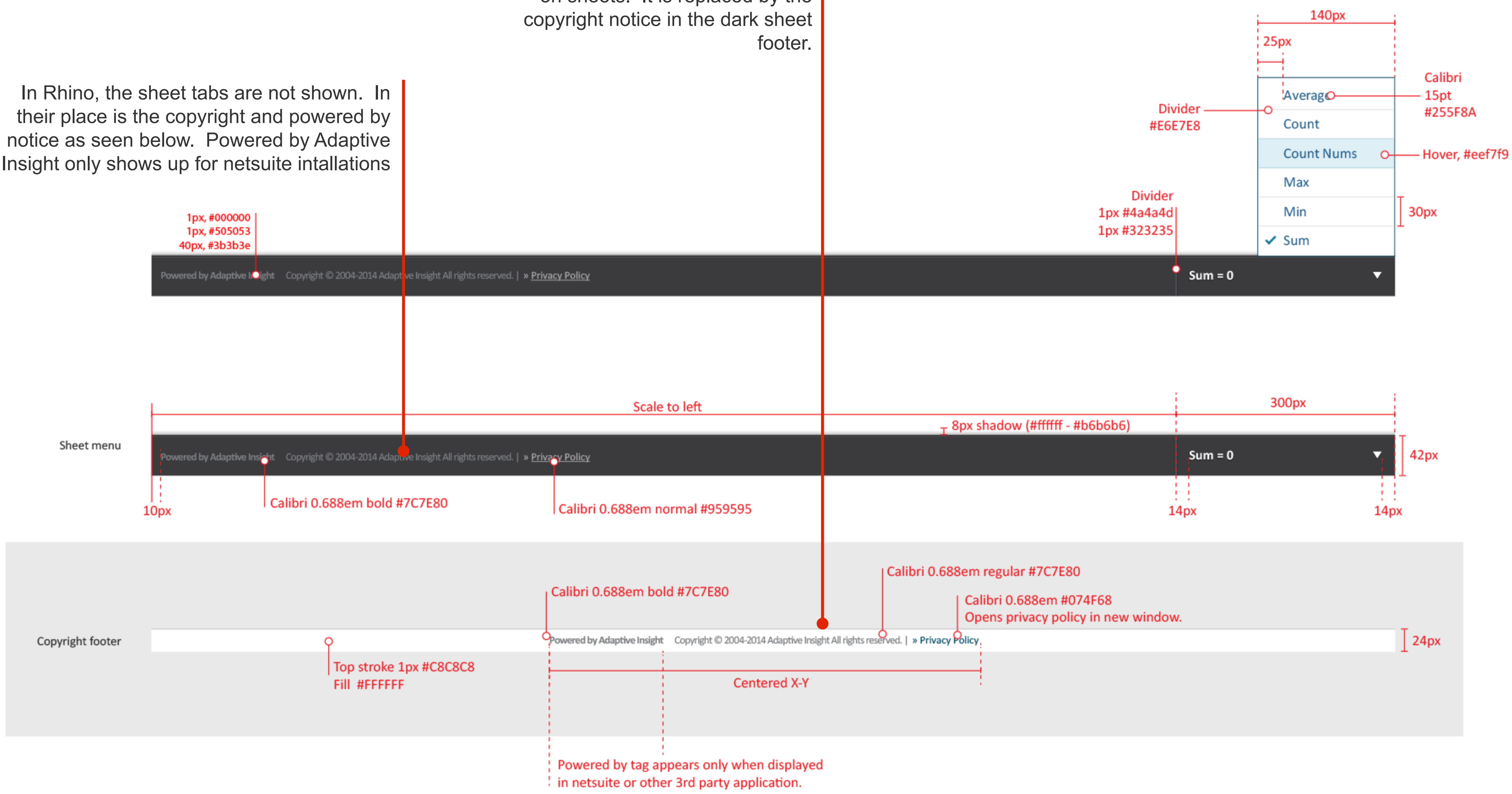
Global footer (Rhino Timeframe)

Adaptive Insight

✓ Approved

The white footer does not appear on sheets. It is replaced by the copyright notice in the dark sheet footer.

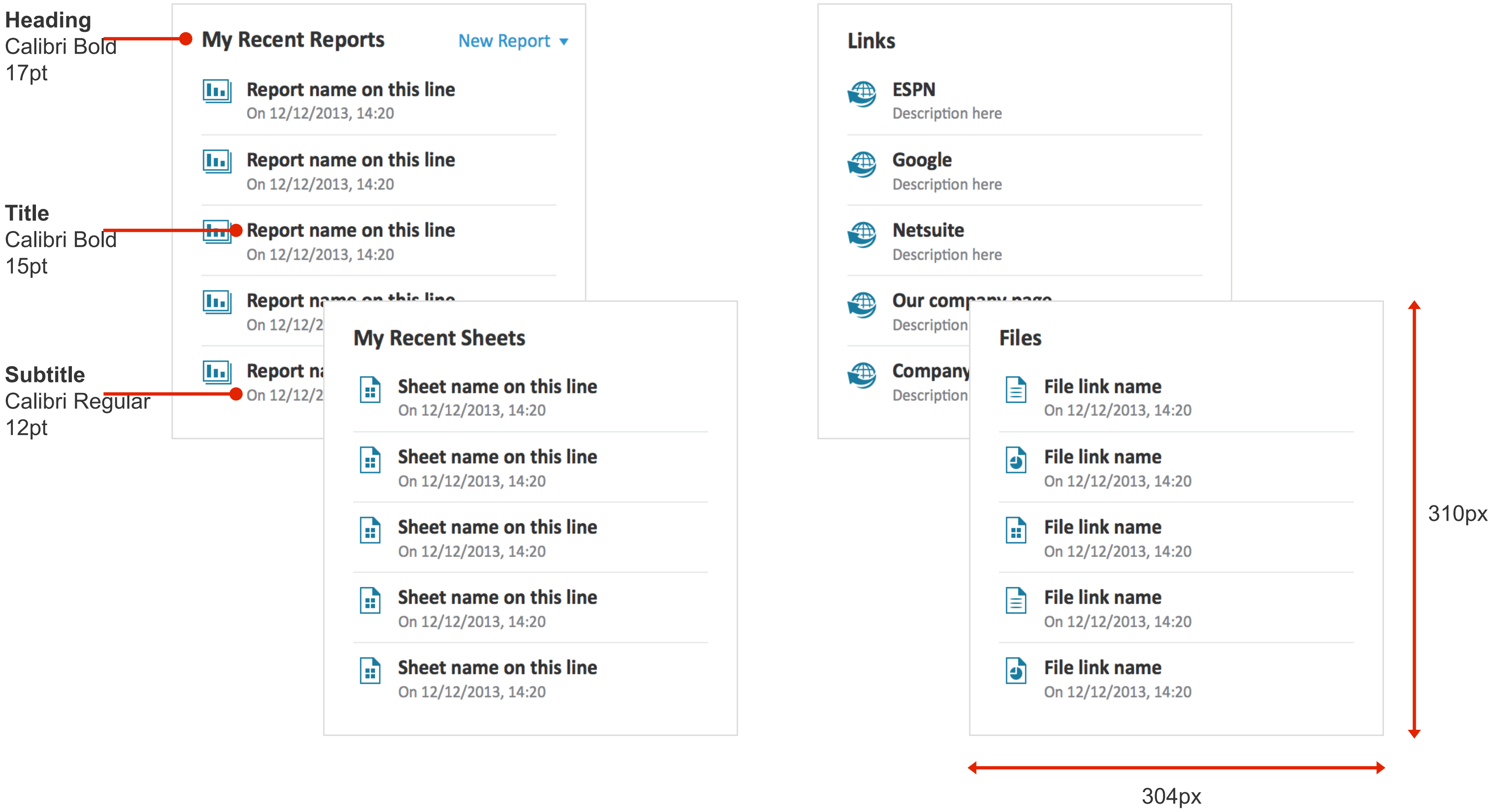
In Rhino, the sheet tabs are not shown. In their place is the copyright and powered by notice as seen below. Powered by Adaptive Insight only shows up for netsuite intallations


140px
25px
Divider
#E6E7E8
Average
Calibri
15pt
#255F8A
Count
Count Nums
Hover, #eef7f9
Max
Min
30px
Sum
Divider
1px #4a4a4d
1px #323235
1px, #000000
1px, #505053
40px, #3b3b3e
Powered by Adaptive Insight
Copyright © 2004-2014 Adaptive Insight All rights reserved. | » Privacy Policy
Sum = 0
Scale to left
300px
8px shadow (#ffffff - #b6b6b6)
Sheet menu
Powered by Adaptive Insight
Copyright © 2004-2014 Adaptive Insight All rights reserved. | » Privacy Policy
Sum = 0
42px
10px
Calibri 0.688em bold #7C7E80
Calibri 0.688em normal #959595
14px
14px
Calibri 0.688em regular #7C7E80
Calibri 0.688em bold #7C7E80
Calibri 0.688em #074F68
Opens privacy policy in new window.
Copyright footer
Powered by Adaptive Insight
Copyright © 2004-2014 Adaptive Insight All rights reserved. | » Privacy Policy
24px
Top stroke 1px #C8C8C8
Fill #FFFFFF
Centered X-Y
Powered by tag appears only when displayed
in netsuite or other 3rd party application.

Start Page

Start Page

Widgets



Heading
Calibri Bold
17pt

Title
Calibri Bold
15pt

Subtitle
Calibri Regular
12pt

My Recent Reports New Report ▾

Report name on this line
On 12/12/2013, 14:20

Report name on this line
On 12/12/2013, 14:20

Report name on this line
On 12/12/2013, 14:20

Report n
On 12/12/2

Report na
On 12/12/2

My Recent Sheets

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Sheet name on this line
On 12/12/2013, 14:20

Links

ESPN
Description here

Google
Description here

Netsuite
Description here

Our comp
Description

Company
Description

Files

File link name
On 12/12/2013, 14:20

File link name
On 12/12/2013, 14:20

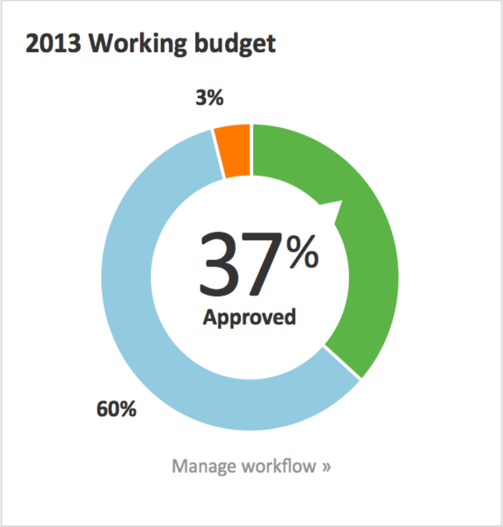
File link name
On 12/12/2013, 14:20

File link name
On 12/12/2013, 14:20

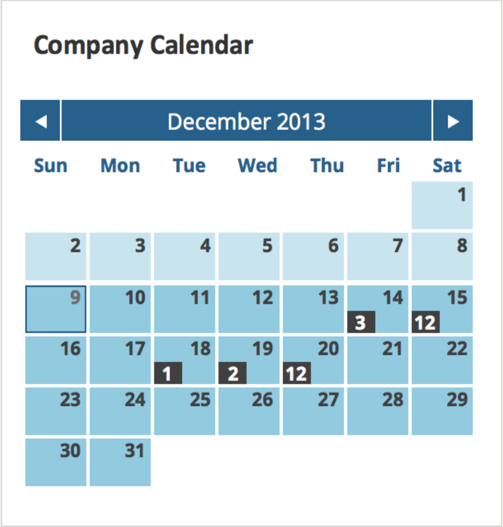
File link name
On 12/12/2013, 14:20

Start Page

Widgets

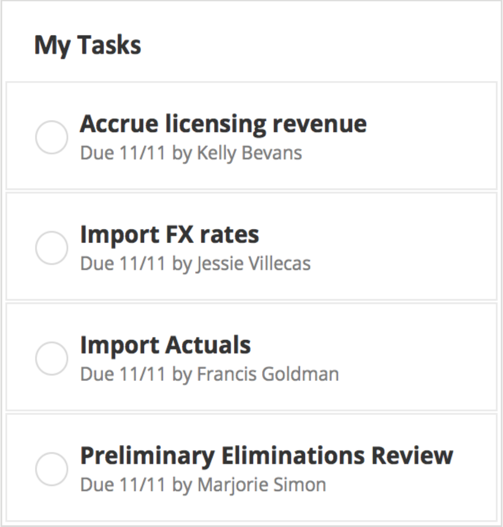

2013 Working budget

Manage workflow »


Company Calendar

◀ December 2013 ▶

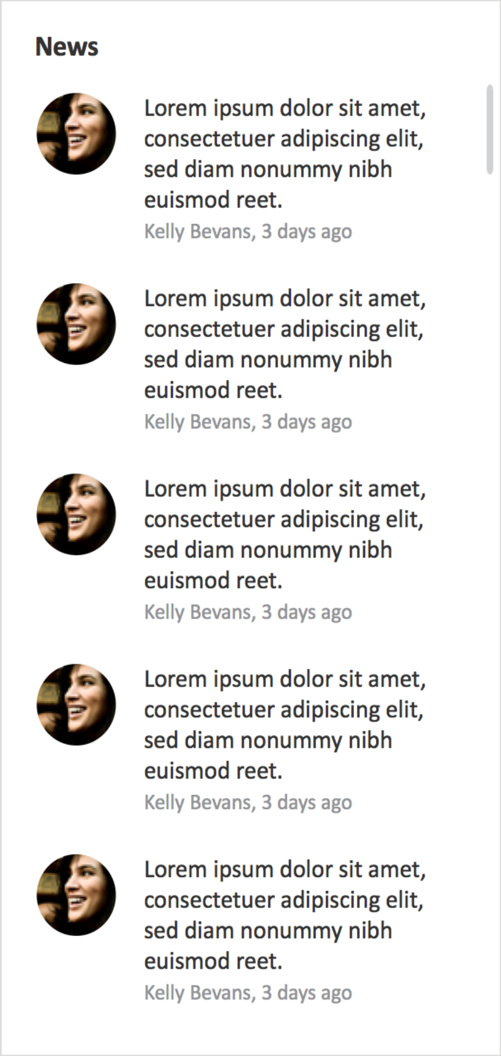
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14 3	15 12
16	17	18 1	19 2	20 12	21	22
23	24	25	26	27	28	29
30	31					


My Tasks

- ○ **Accrue licensing revenue**
  Due 11/11 by Kelly Bevans
- ○ **Import FX rates**
  Due 11/11 by Jessie Villecas
- ○ **Import Actuals**
  Due 11/11 by Francis Goldman
- ○ **Preliminary Eliminations Review**
  Due 11/11 by Marjorie Simon

Start Page

Widgets



News

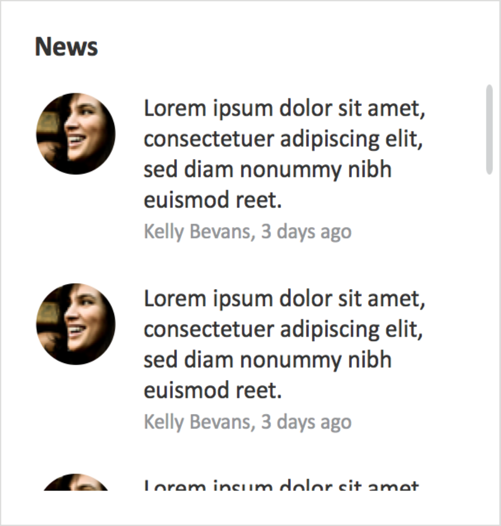
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago



News

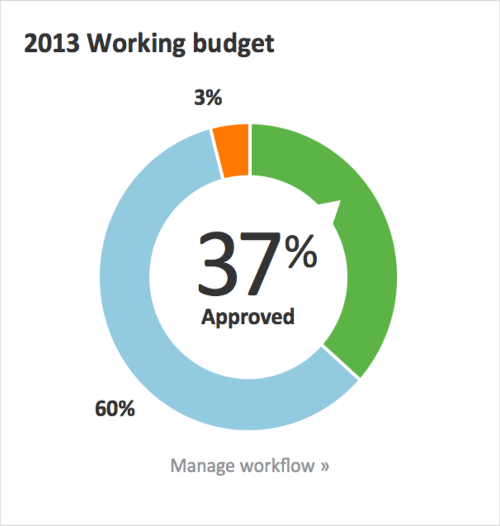
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod reet.
Kelly Bevans, 3 days ago

Lorem ipsum dolor sit amet

Start Page

Widgets


2013 Working budget
3%
37%
Approved
60%
Manage workflow »

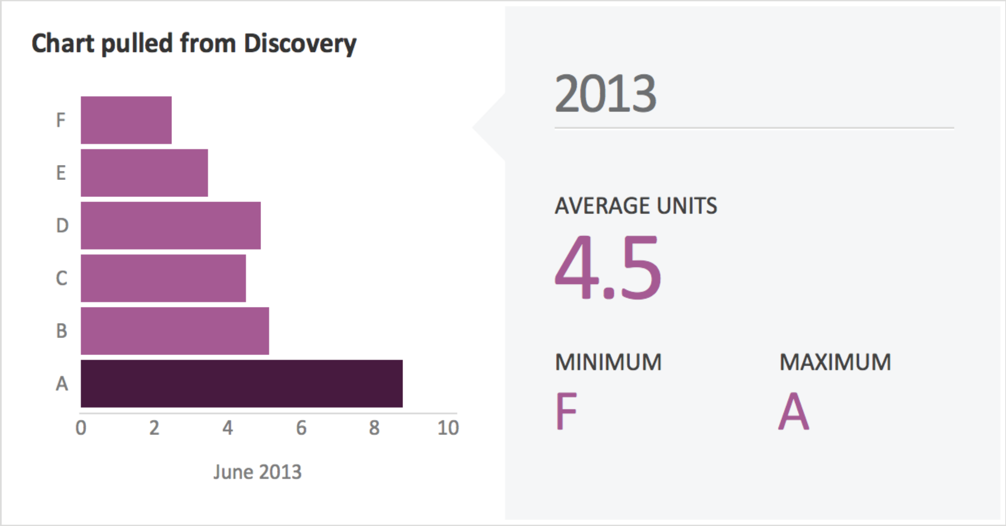


Chart pulled from Discovery
F
E
D
C
B
A
0
2
4
6
8
10
June 2013
2013

AVERAGE UNITS
4.5

MINIMUM
F

MAXIMUM
A

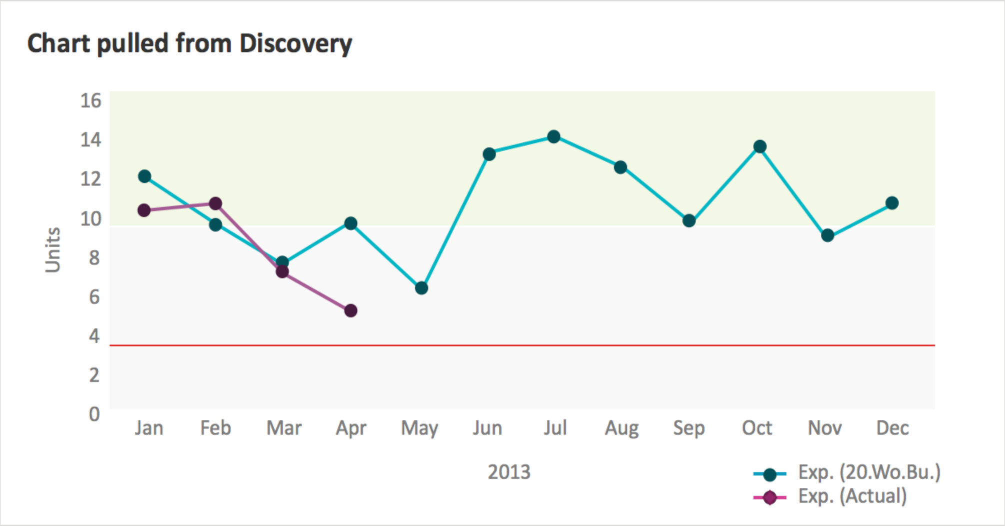


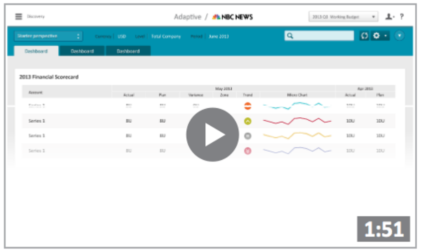
Chart pulled from Discovery
16
14
12
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
Exp. (Actual)

Start Page

Widgets

Review 2013 planned capital spending from Q4; remove any which have already been purchased.

Lorem ipsum



Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh.

Ut wisi enim ad minim veniam, quis

Lorem ipsum

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem.

[» Link somewhere]

by wsj.com, Dec 12th 2013

Lorem ipsum

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Diam nonummy hopla mot!

File name on this line
232kb

Guidelines

Sales actuals, including units and revenue, have been imported through December - see Sales cube sheet

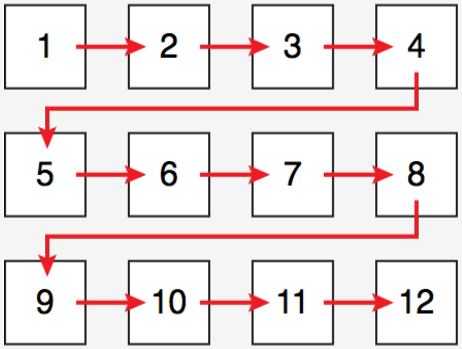
GL actuals, including transactions, have been imported through December 2011 - see Expenses and P&L sheets

Start Page

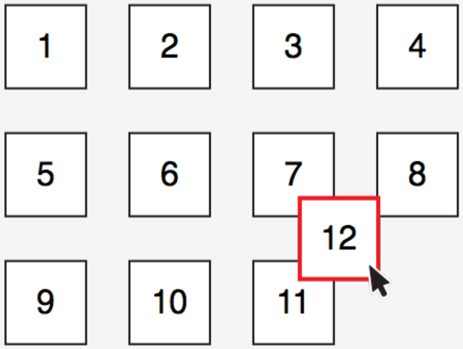
Organizing widgets

Approved

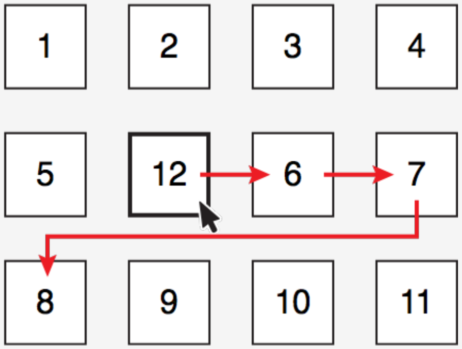
Priority of items


1
2
3
4
5
6
7
8
9
10
11
12

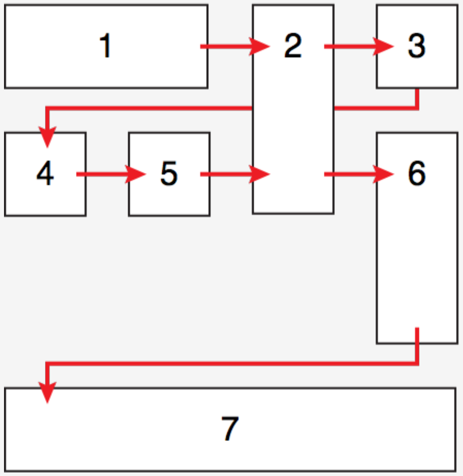
Moving an item


1
2
3
4
5
6
7
8
12
9
10
11

Reorder after dropping an item

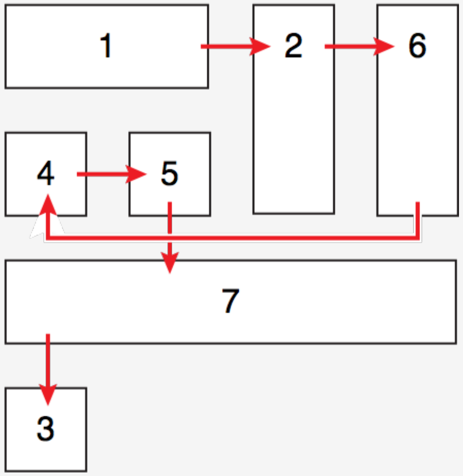

1
2
3
4
5
12
6
7
8
9
10
11

Priority of items



Auto-organize

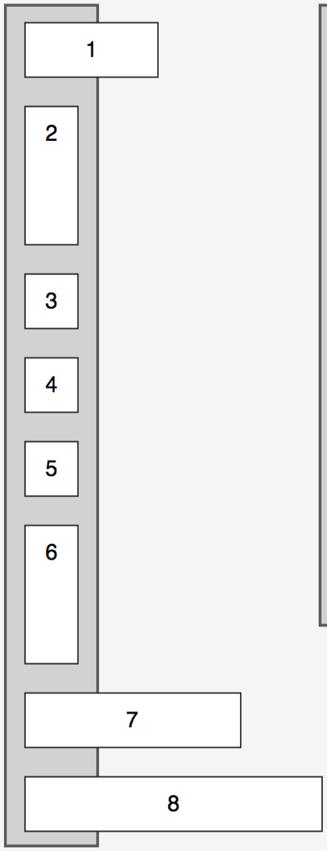
Changes order, not priority



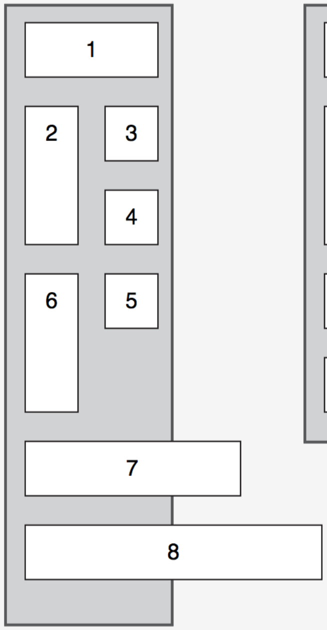
Scaling the widget screen

Approved

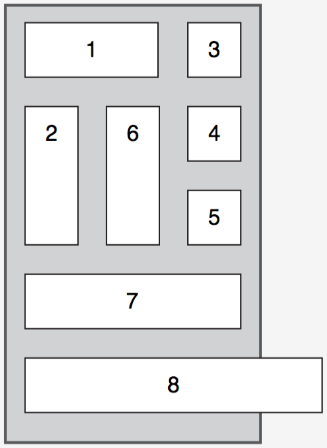
Window size < 640px
1-2-3-4-5-6-7-8



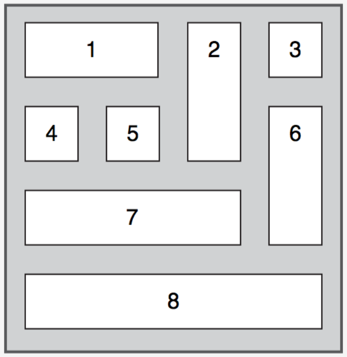
Window size = 640-959px
1-2-3-4-6-5-7-8



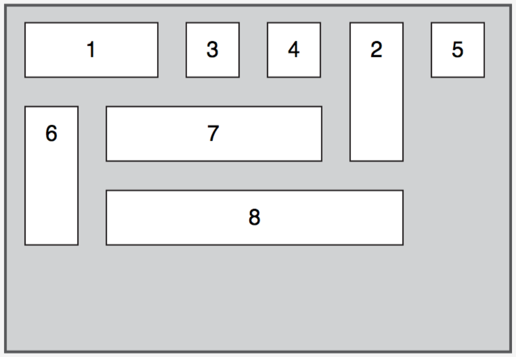
Window size = 960-1239px
1-3-2-6-4-5-7-8



Window size = 1240-1860px
1-2-3-4-5-6-7-8 **(baseline)**



Window size > 1860px
1-3-4-2-5-6-7-8



Rules for reordering widgets on scaling

1. Baseline priority is set when user saves a dashboard, all other resolutions are relative that order. If dashboard is edited again in different resolution, then that becomes new baseline. When resizing the screen, organize it automatically on the fly

2. Priority in organization: Avoid large holes in the layout. If there are gaps, have them on the right side. Strive to maintain order of elements as the same, as much as possible. When user is organizing the widgets the order is 1:1 same as what he is editing. “Auto-organize” button becomes active if there are holes in the layout that can be removed by reordering

Discovery

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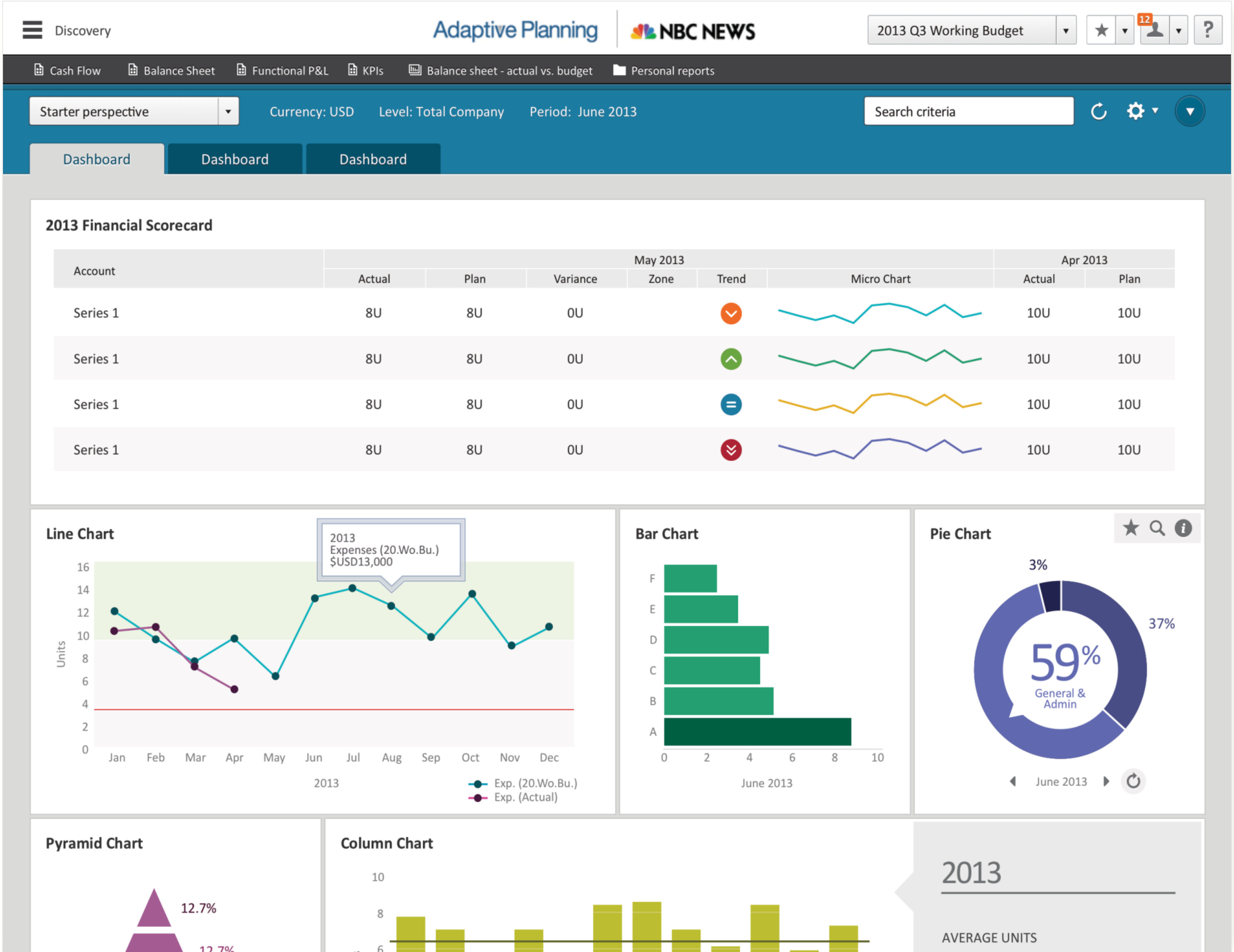
Discovery

Top controls


Discovery
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
Starter perspective
Search criteria
Dashboard
Dashboard
Dashboard

Currency: USD Level: Total Company Period: June 2013

2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U		⌄		10U	10U
Series 1	8U	8U	0U		⌃		10U	10U
Series 1	8U	8U	0U		=		10U	10U
Series 1	8U	8U	0U		⏬		10U	10U

Line Chart
2013
Expenses (20.Wo.Bu.)
$USD13,000
Units
16
14
12
10
8
6
4
2
0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
Exp. (Actual)
Bar Chart
F
E
D
C
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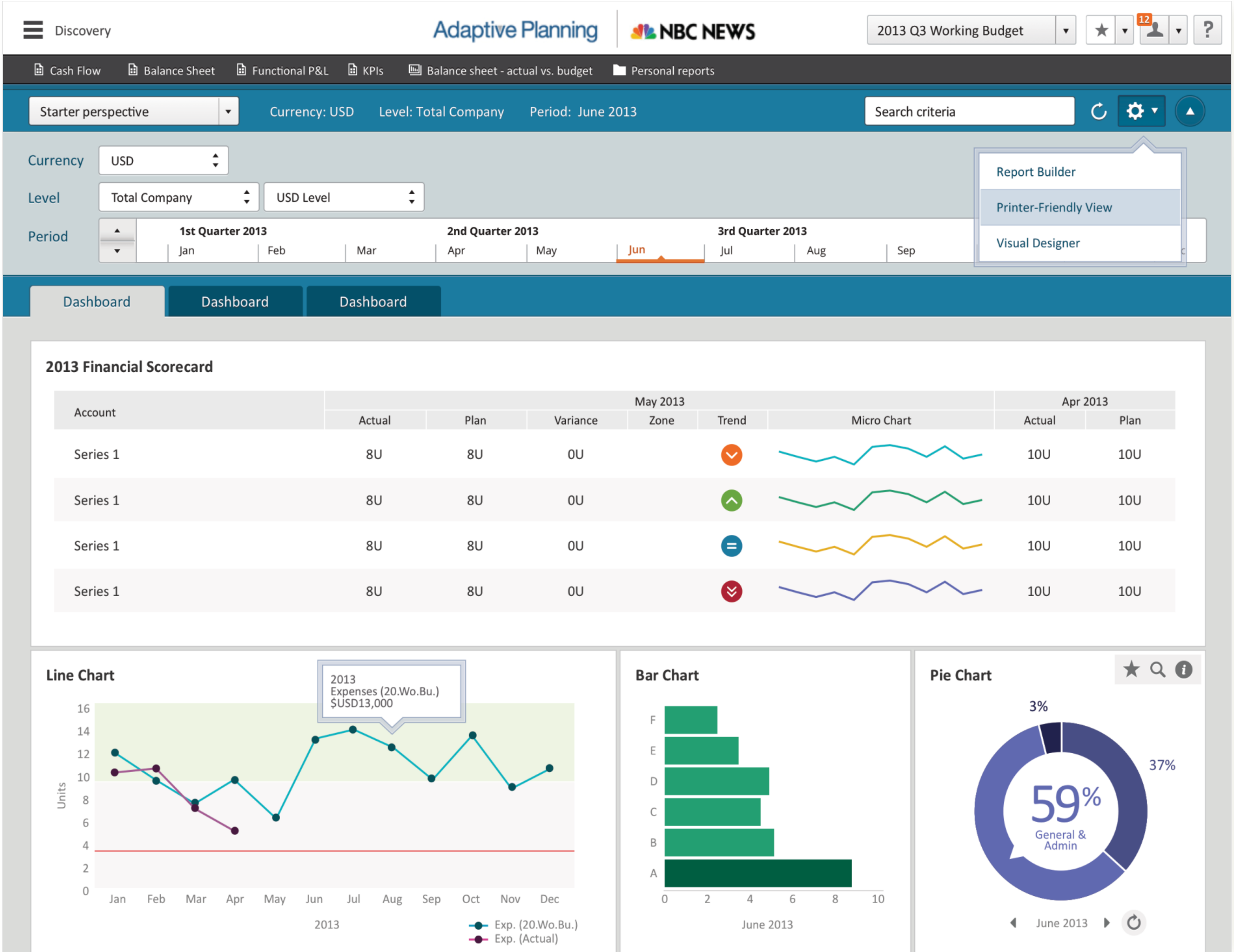
2
4
6
8
10
June 2013
Pie Chart
3%
37%
59%
General & Admin
June 2013
Pyramid Chart
12.7%
12.7%
Column Chart
10
8
6
2013
AVERAGE UNITS

Discovery

Top controls


Discovery
Adaptive Planning
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2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
Starter perspective
Currency: USD
Level: Total Company
Period: June 2013
Search criteria
Report Builder
Printer-Friendly View
Visual Designer
Currency
USD
Level
Total Company
USD Level
Period
1st Quarter 2013
2nd Quarter 2013
3rd Quarter 2013
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Dashboard
Dashboard
Dashboard
Line Chart
2013
Expenses (20.Wo.Bu.)
$USD13,000
Units
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12
10
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Exp. (20.Wo.Bu.)
Exp. (Actual)
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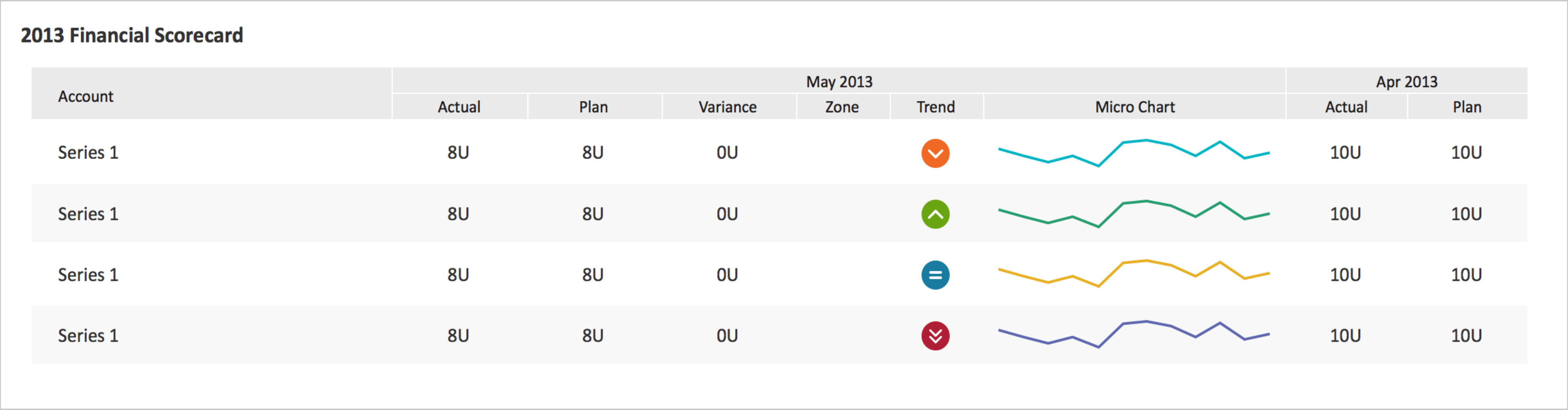
2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U		⌄		10U	10U
Series 1	8U	8U	0U		⌃		10U	10U
Series 1	8U	8U	0U		=		10U	10U
Series 1	8U	8U	0U		⌄⌄		10U	10U

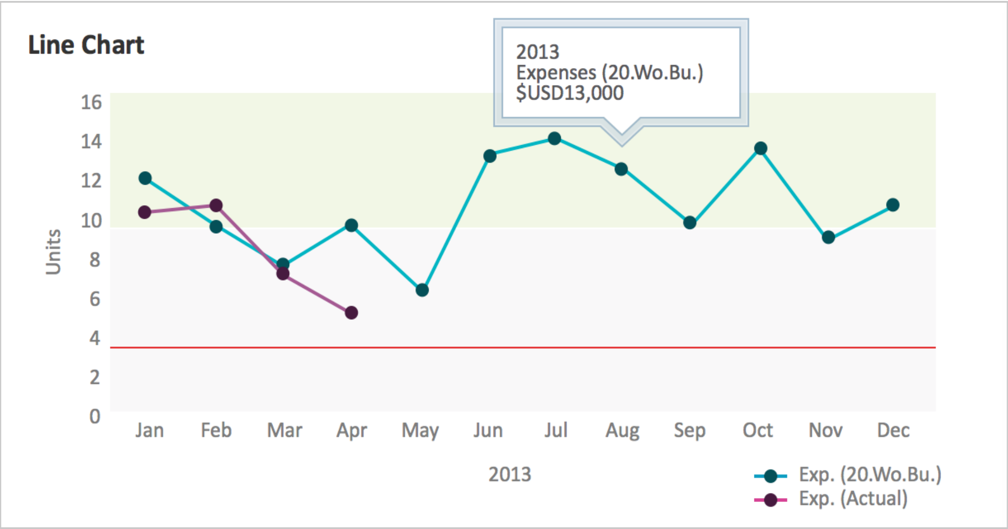
Discovery

Dials

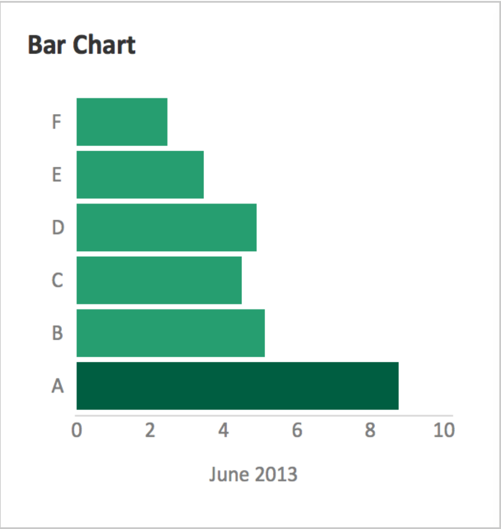


2013 Financial Scorecard

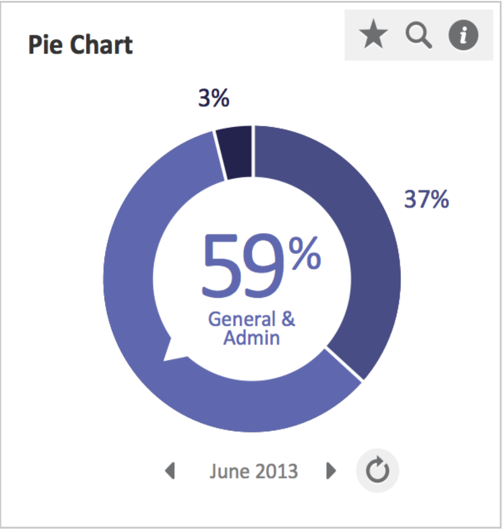
Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U		⌄		10U	10U
Series 1	8U	8U	0U		⌃		10U	10U
Series 1	8U	8U	0U		=		10U	10U
Series 1	8U	8U	0U		⌄⌄		10U	10U



Line Chart



Bar Chart

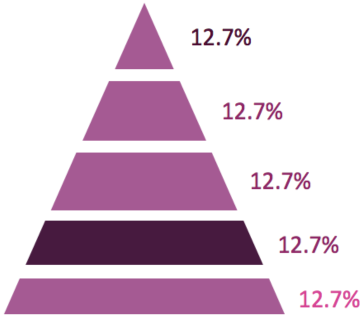


Pie Chart

Discovery

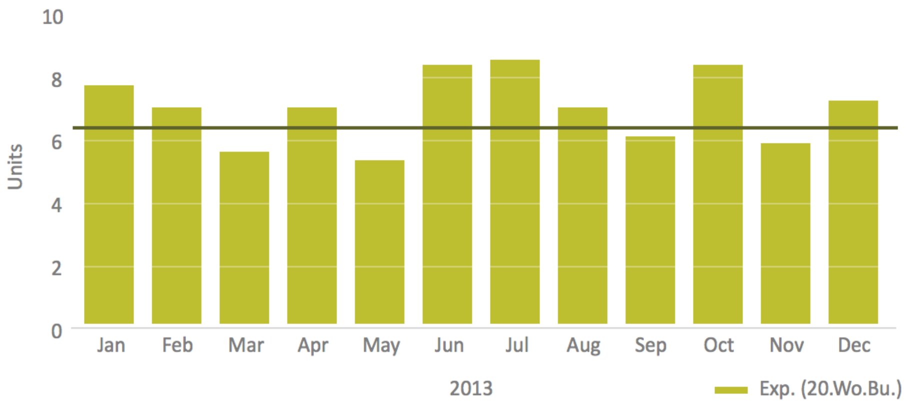
Dials

Pyramid Chart



June 2013

Column Chart



2013

AVERAGE UNITS

6, 200

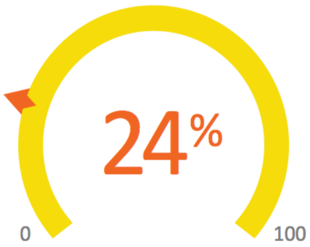
MINIMUM	MAXIMUM
May	July

Table

Account	Series
Category A	8U
Category B	8U
Category C	8U
Category D	8U
Category E	8U

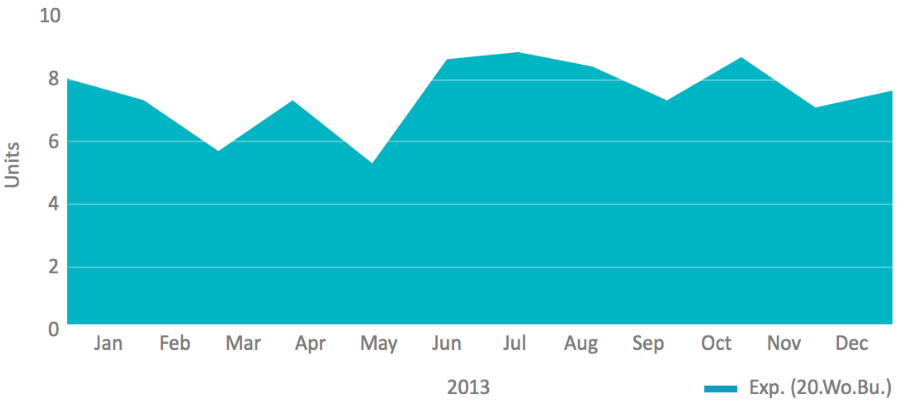
June 2013

Circular Gauge



June 2013

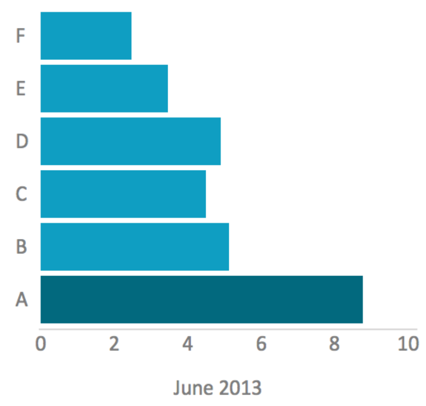
Area Chart



Discovery

Dials

Bar Chart

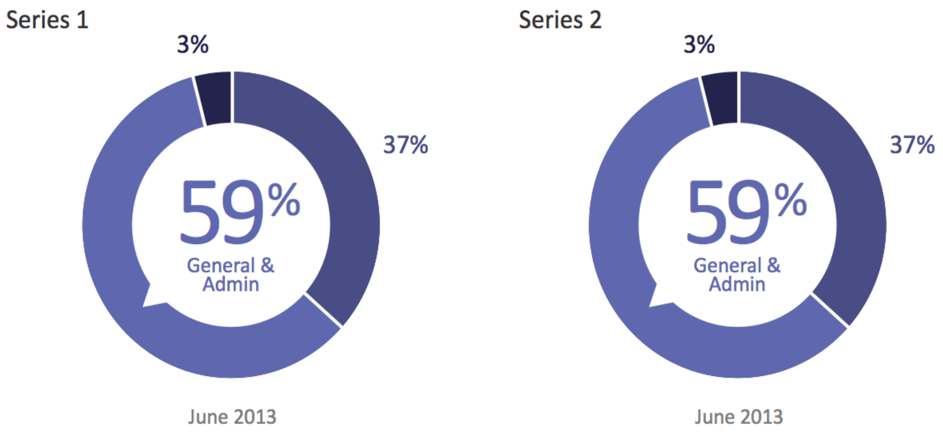


TEXTUAL DESCRIPTION

Bacon ipsum dolor sit amet chuck corned beef magna, mollit drumstick laboris sint venison bresaola veniam voluptate chicken flank.

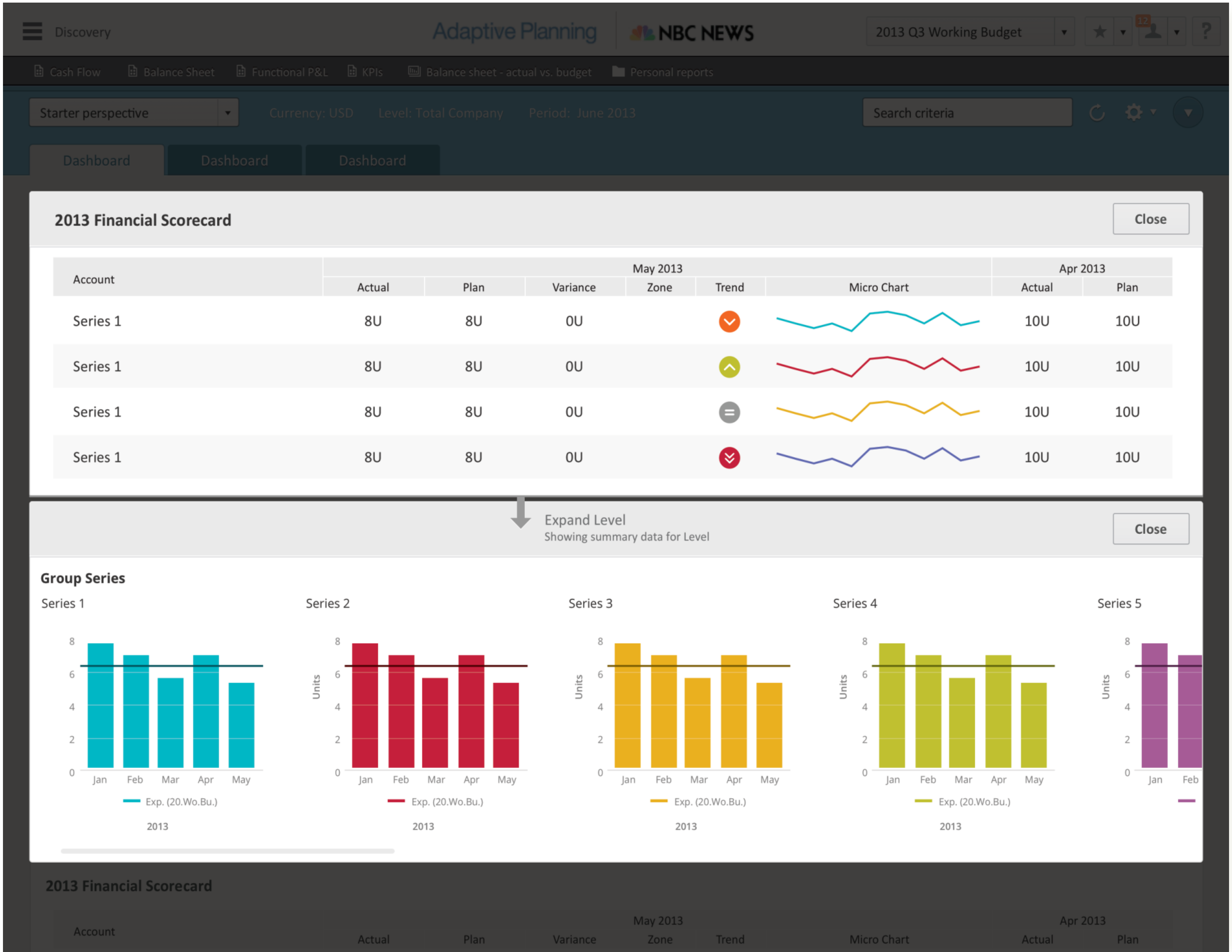
Filet mignon capicola fatback labori.

Pie Chart



Discovery

Drill down


Discovery
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
Starter perspective
Currency: USD
Level: Total Company
Period: June 2013
Search criteria
Dashboard
Dashboard
Dashboard
Close
Close

2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U		⌄		10U	10U
Series 1	8U	8U	0U		⌃		10U	10U
Series 1	8U	8U	0U		=		10U	10U
Series 1	8U	8U	0U		⌄⌄		10U	10U

Expand Level
Showing summary data for Level

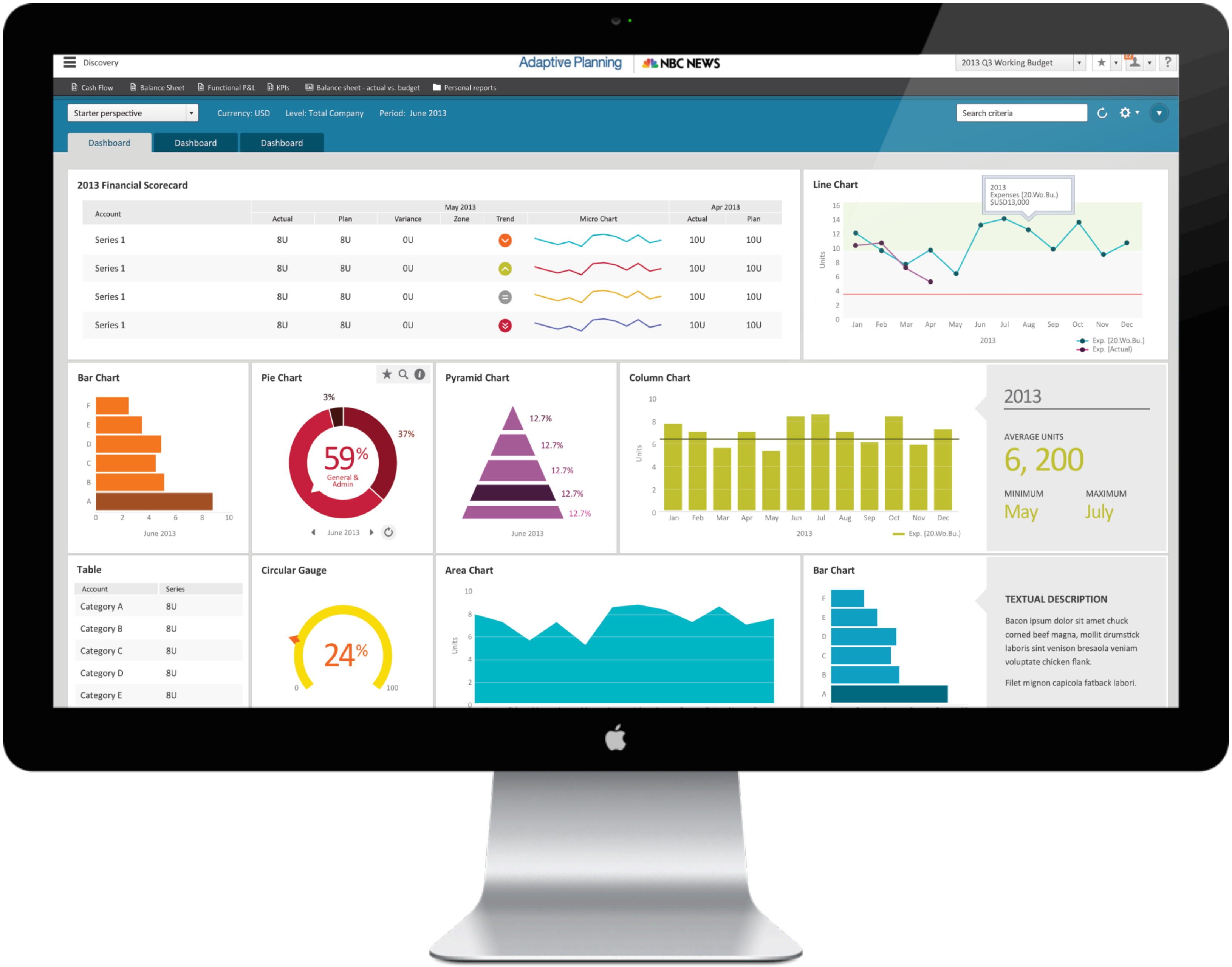
Group Series

Series 1
Series 2
Series 3
Series 4
Series 5
Units
0
2
4
6
8
Jan
Feb
Mar
Apr
May
Exp. (20.Wo.Bu.)
2013

2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan

Adaptive Insight



Discovery
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
Starter perspective
Currency: USD
Level: Total Company
Period: June 2013
Search criteria
Dashboard
Dashboard
Dashboard
Line Chart
2013
Expenses (20.Wo.Bu.)
$USD13,000
16
14
12
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Units
Jan
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Jun
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Aug
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Oct
Nov
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2013
Exp. (20.Wo.Bu.)
Exp. (Actual)
Bar Chart
F
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8
10
June 2013
Pie Chart
3%
37%
59%
General & Admin
June 2013
Pyramid Chart
12.7%
12.7%
12.7%
12.7%
12.7%
June 2013
Column Chart
10
8
6
4
2
0
Units
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
Exp. (20.Wo.Bu.)
2013
AVERAGE UNITS
6, 200
MINIMUM
May
MAXIMUM
July
Circular Gauge
24%
0
100
Area Chart
10
8
6
4
2
0
Units
Bar Chart
F
E
D
C
B
A

2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U				10U	10U
Series 1	8U	8U	0U				10U	10U
Series 1	8U	8U	0U				10U	10U
Series 1	8U	8U	0U				10U	10U

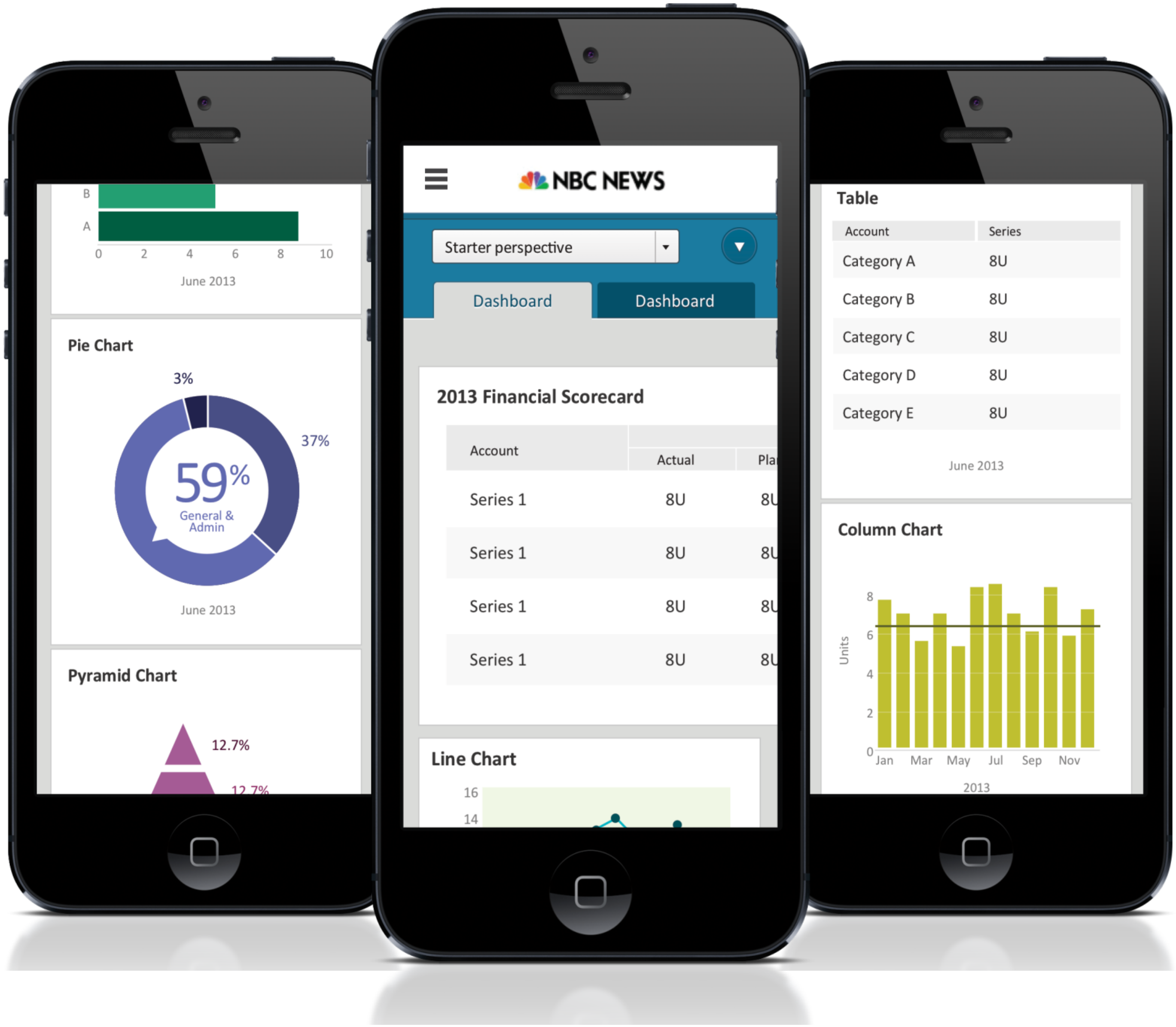
Table

Account	Series
Category A	8U
Category B	8U
Category C	8U
Category D	8U
Category E	8U

TEXTUAL DESCRIPTION

Bacon ipsum dolor sit amet chuck corned beef magna, mollit drumstick laboris sint venison bresaola veniam voluptate chicken flank.

Filet mignon capicola fatback labori.


B
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June 2013
Pie Chart
3%
37%
59%
General & Admin
June 2013
Pyramid Chart
12.7%
12.7%
NBC NEWS
Starter perspective
Dashboard
Dashboard

2013 Financial Scorecard

Account	Actual	Pla
Series 1	8U	8U
Series 1	8U	8U
Series 1	8U	8U
Series 1	8U	8U

Line Chart
16
14

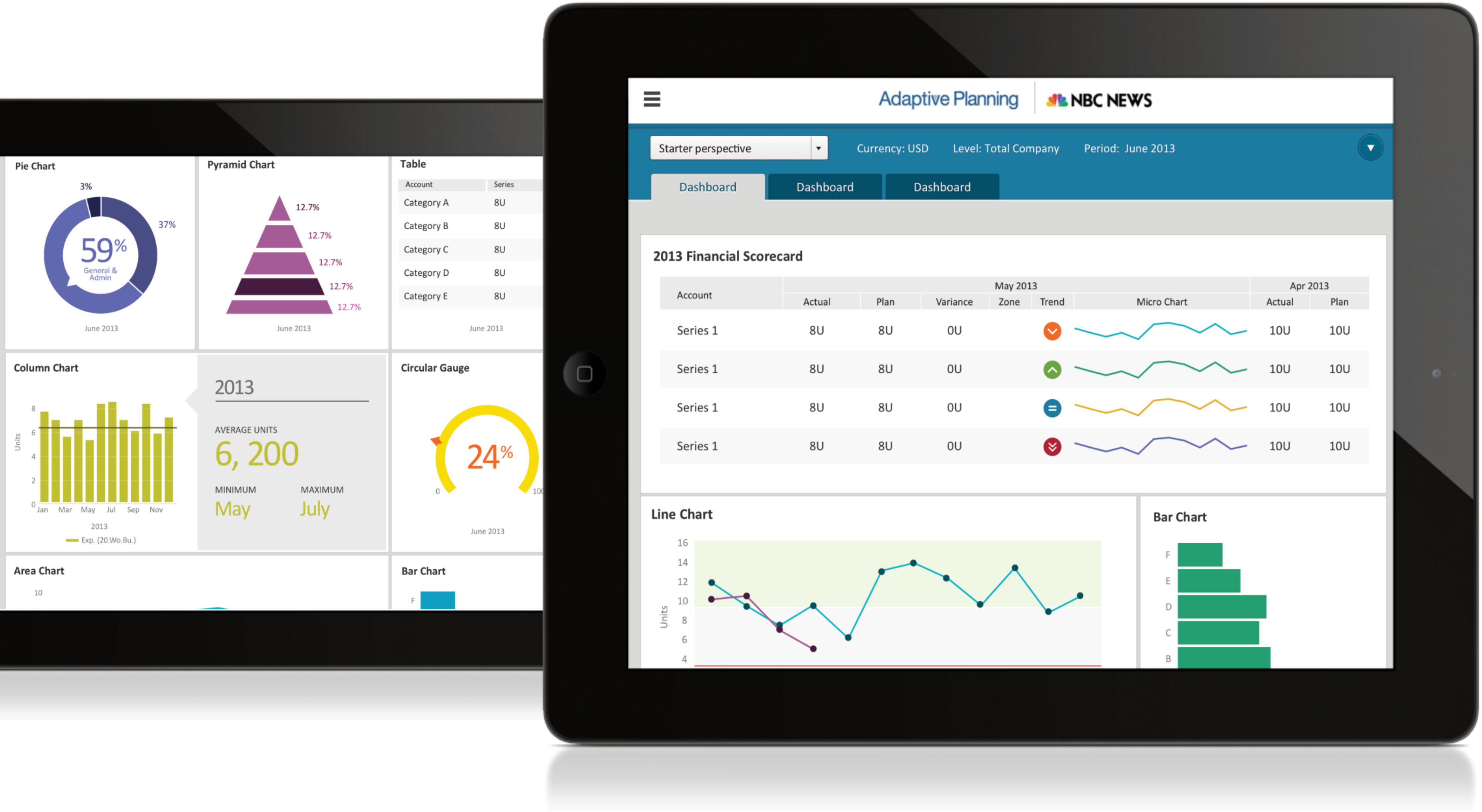
Table

Account	Series
Category A	8U
Category B	8U
Category C	8U
Category D	8U
Category E	8U

June 2013

Column Chart
Units
8
6
4
2
0
Jan
Mar
May
Jul
Sep
Nov
2013

Adaptive Insight



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Starter perspective ▾ Currency: USD Level: Total Company Period: June 2013

Dashboard | Dashboard | Dashboard

2013 Financial Scorecard

Account	May 2013						Apr 2013	
	Actual	Plan	Variance	Zone	Trend	Micro Chart	Actual	Plan
Series 1	8U	8U	0U		▼		10U	10U
Series 1	8U	8U	0U		▲		10U	10U
Series 1	8U	8U	0U		=		10U	10U
Series 1	8U	8U	0U		▼		10U	10U

Table

Account	Series
Category A	8U
Category B	8U
Category C	8U
Category D	8U
Category E	8U

June 2013

2013

AVERAGE UNITS 6, 200

MINIMUM May

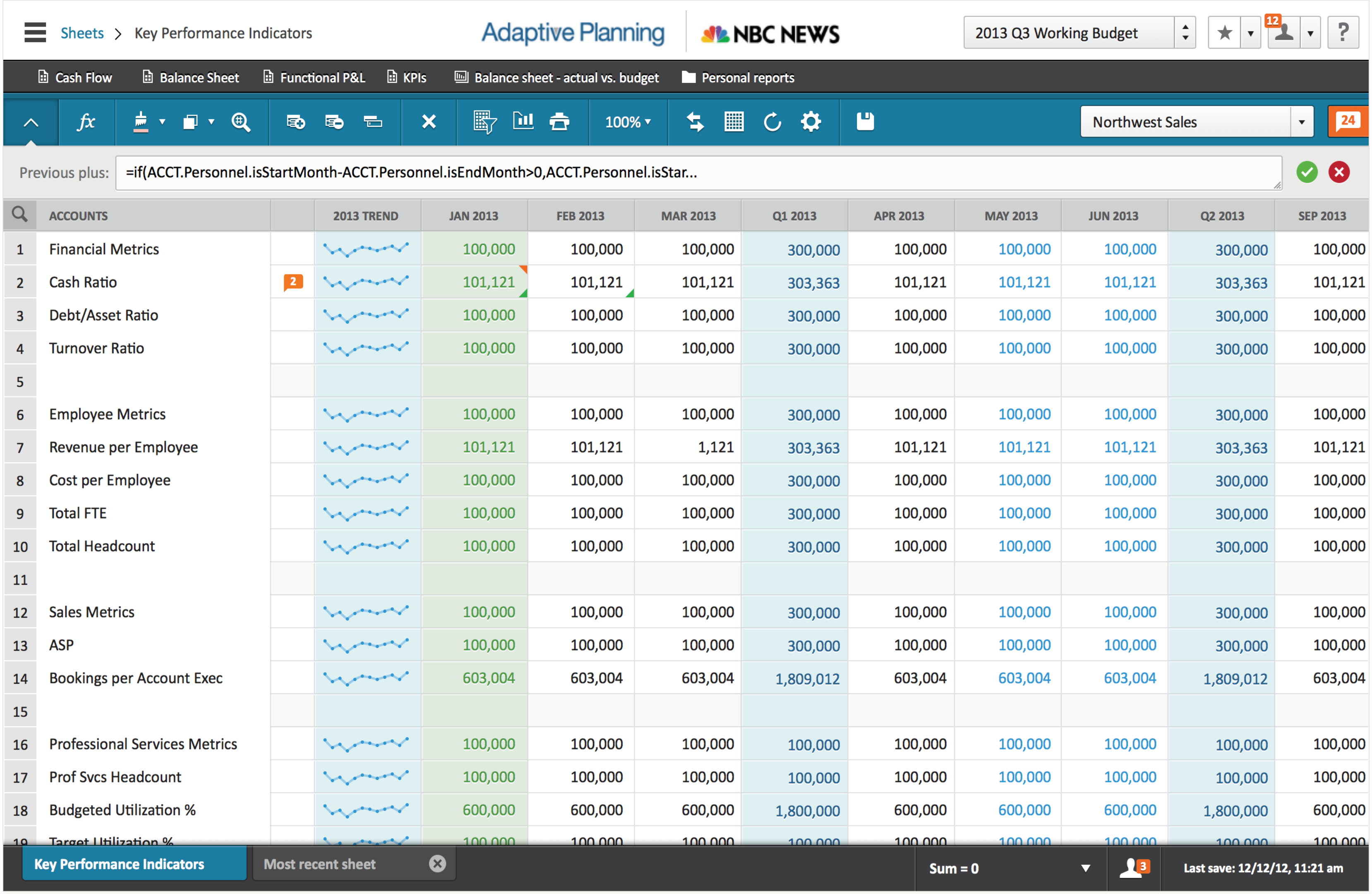
MAXIMUM July

Pie Chart
3%
37%
59%
General & Admin
June 2013
Pyramid Chart
12.7%
12.7%
12.7%
12.7%
12.7%
June 2013
Column Chart
Units
8
6
4
2
0
Jan
Mar
May
Jul
Sep
Nov
2013
Exp. (20.Wo.Bu.)
Circular Gauge
24%
0
100
June 2013
Area Chart
10
Bar Chart
F
Line Chart
16
14
12
10
8
6
4
Units
Bar Chart
F
E
D
C
B

Sheets

Standard sheet

Approved



Sheets > Key Performance Indicators
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Northwest Sales
24

Previous plus: =if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

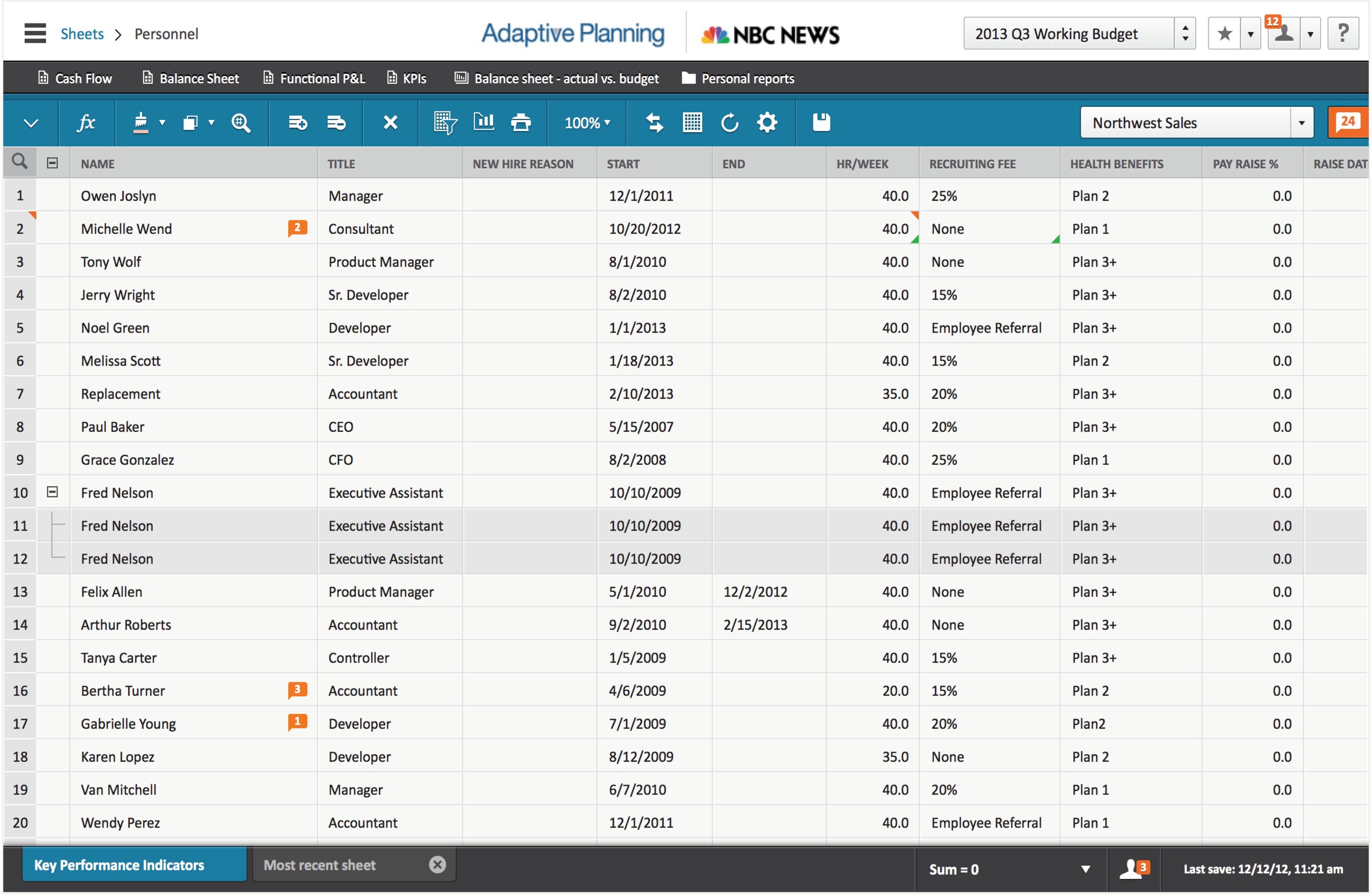
	ACCOUNTS		2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	SEP 2013
1	Financial Metrics			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
2	Cash Ratio	2		101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363	101,121
3	Debt/Asset Ratio			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
4	Turnover Ratio			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
5												
6	Employee Metrics			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
7	Revenue per Employee			101,121	101,121	1,121	303,363	101,121	101,121	101,121	303,363	101,121
8	Cost per Employee			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
9	Total FTE			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
10	Total Headcount			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
11												
12	Sales Metrics			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
13	ASP			100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
14	Bookings per Account Exec			603,004	603,004	603,004	1,809,012	603,004	603,004	603,004	1,809,012	603,004
15												
16	Professional Services Metrics			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
17	Prof Svcs Headcount			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
18	Budgeted Utilization %			600,000	600,000	600,000	1,800,000	600,000	600,000	600,000	1,800,000	600,000
19	Target Utilization %			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000

Key Performance Indicators
Most recent sheet
Sum = 0
3
Last save: 12/12/12, 11:21 am

Sheets

Modeled sheet

Approved


Sheets > Personnel
Adaptive Planning
NBC NEWS
2013 Q3 Working Budget
12
?
Cash Flow
Balance Sheet
Functional P&L
KPIs
Balance sheet - actual vs. budget
Personal reports
fx
100%
Northwest Sales
24

	NAME	TITLE	NEW HIRE REASON	START	END	HR/WEEK	RECRUITING FEE	HEALTH BENEFITS	PAY RAISE %	RAISE DAT
1	Owen Joslyn	Manager		12/1/2011		40.0	25%	Plan 2	0.0	
2	Michelle Wend	Consultant		10/20/2012		40.0	None	Plan 1	0.0	
3	Tony Wolf	Product Manager		8/1/2010		40.0	None	Plan 3+	0.0	
4	Jerry Wright	Sr. Developer		8/2/2010		40.0	15%	Plan 3+	0.0	
5	Noel Green	Developer		1/1/2013		40.0	Employee Referral	Plan 3+	0.0	
6	Melissa Scott	Sr. Developer		1/18/2013		40.0	15%	Plan 2	0.0	
7	Replacement	Accountant		2/10/2013		35.0	20%	Plan 3+	0.0	
8	Paul Baker	CEO		5/15/2007		40.0	20%	Plan 3+	0.0	
9	Grace Gonzalez	CFO		8/2/2008		40.0	25%	Plan 1	0.0	
10	Fred Nelson	Executive Assistant		10/10/2009		40.0	Employee Referral	Plan 3+	0.0	
11	Fred Nelson	Executive Assistant		10/10/2009		40.0	Employee Referral	Plan 3+	0.0	
12	Fred Nelson	Executive Assistant		10/10/2009		40.0	Employee Referral	Plan 3+	0.0	
13	Felix Allen	Product Manager		5/1/2010	12/2/2012	40.0	None	Plan 3+	0.0	
14	Arthur Roberts	Accountant		9/2/2010	2/15/2013	40.0	None	Plan 3+	0.0	
15	Tanya Carter	Controller		1/5/2009		40.0	15%	Plan 3+	0.0	
16	Bertha Turner	Accountant		4/6/2009		20.0	15%	Plan 2	0.0	
17	Gabrielle Young	Developer		7/1/2009		40.0	20%	Plan2	0.0	
18	Karen Lopez	Developer		8/12/2009		35.0	None	Plan 2	0.0	
19	Van Mitchell	Manager		6/7/2010		40.0	20%	Plan 1	0.0	
20	Wendy Perez	Accountant		12/1/2011		40.0	Employee Referral	Plan 1	0.0	

Key Performance Indicators
Most recent sheet
Sum = 0
3
Last save: 12/12/12, 11:21 am

Sheets

Cube sheet

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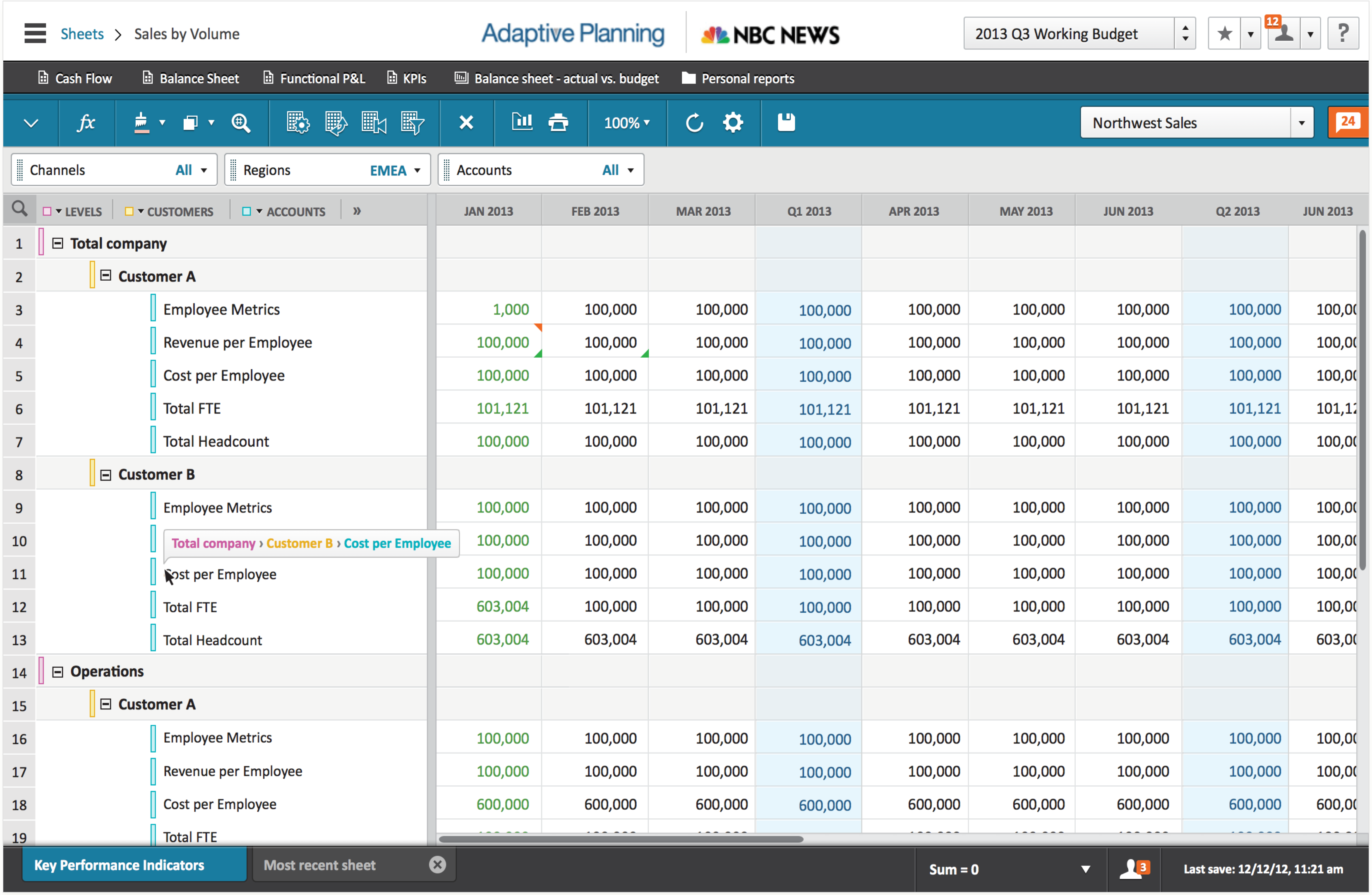


☰ Sheets > Sales by Volume

Adaptive Planning | NBC NEWS

2013 Q3 Working Budget

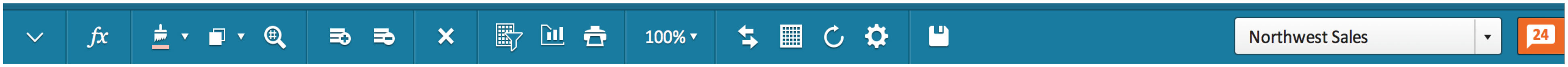
Channels All ▾ | Regions EMEA ▾ | Accounts All ▾

	☐ LEVELS ☐ CUSTOMERS ☐ ACCOUNTS »	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	JUN 2013
1	⊟ **Total company**									
2	⊟ **Customer A**									
3	Employee Metrics	1,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
4	Revenue per Employee	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
5	Cost per Employee	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
6	Total FTE	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,1
7	Total Headcount	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
8	⊟ **Customer B**									
9	Employee Metrics	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
10	Total company › Customer B › Cost per Employee	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
11	ost per Employee	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
12	Total FTE	603,004	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
13	Total Headcount	603,004	603,004	603,004	603,004	603,004	603,004	603,004	603,004	603,0
14	⊟ **Operations**									
15	⊟ **Customer A**									
16	Employee Metrics	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
17	Revenue per Employee	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,0
18	Cost per Employee	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,0
19	Total FTE									

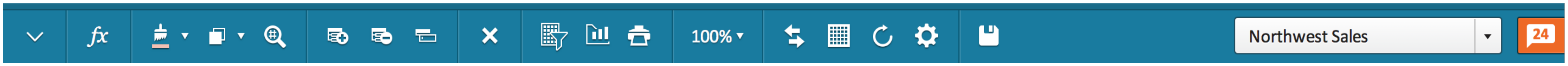
Key Performance Indicators | Most recent sheet ⊗ | Sum = 0 ▾ | 3 | Last save: 12/12/12, 11:21 am

Toolbar

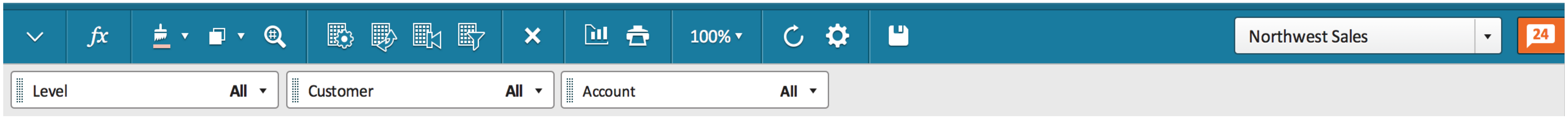
Approved


100%
Northwest Sales
24

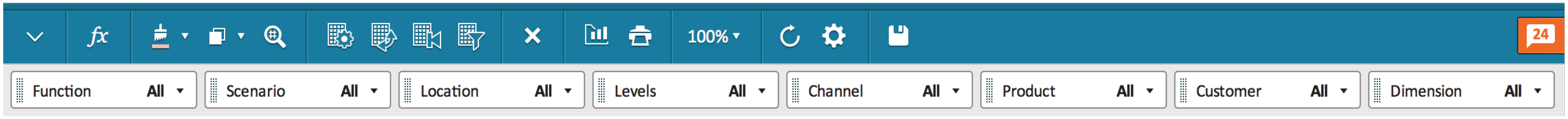
Modeled sheet


100%
Northwest Sales
24

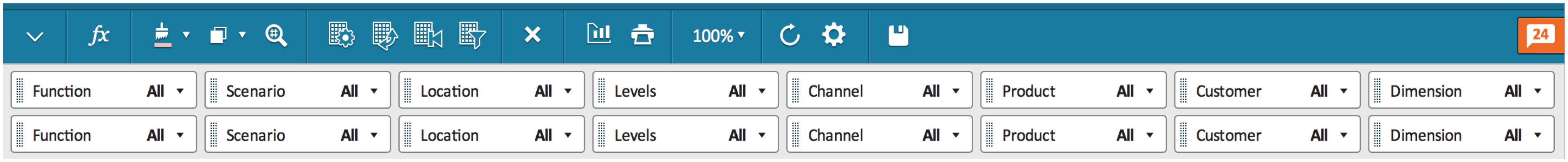
Standard sheet


100%
Northwest Sales
24
Level All
Customer All
Account All

Cube sheet with 3 dimensions


100%
24
Function All
Scenario All
Location All
Levels All
Channel All
Product All
Customer All
Dimension All

Cube sheet with 8 dimensions

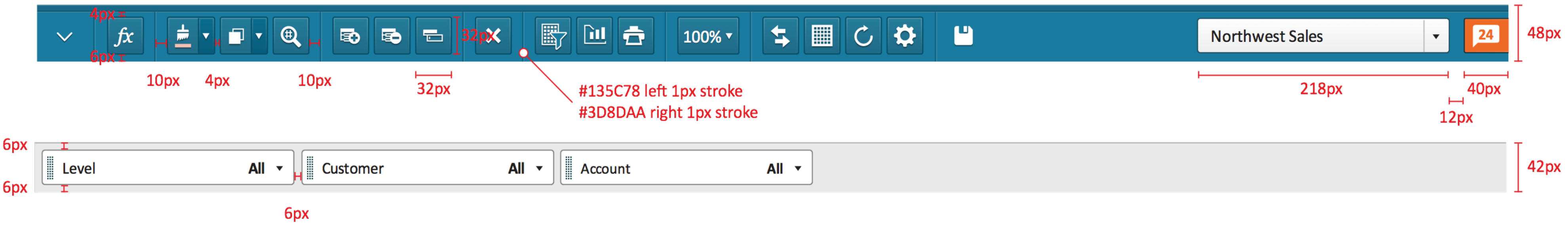

100%
24
Function All
Scenario All
Location All
Levels All
Channel All
Product All
Customer All
Dimension All
Function All
Scenario All
Location All
Levels All
Channel All
Product All
Customer All
Dimension All

Cube sheet with 16 dimensions

Sheets

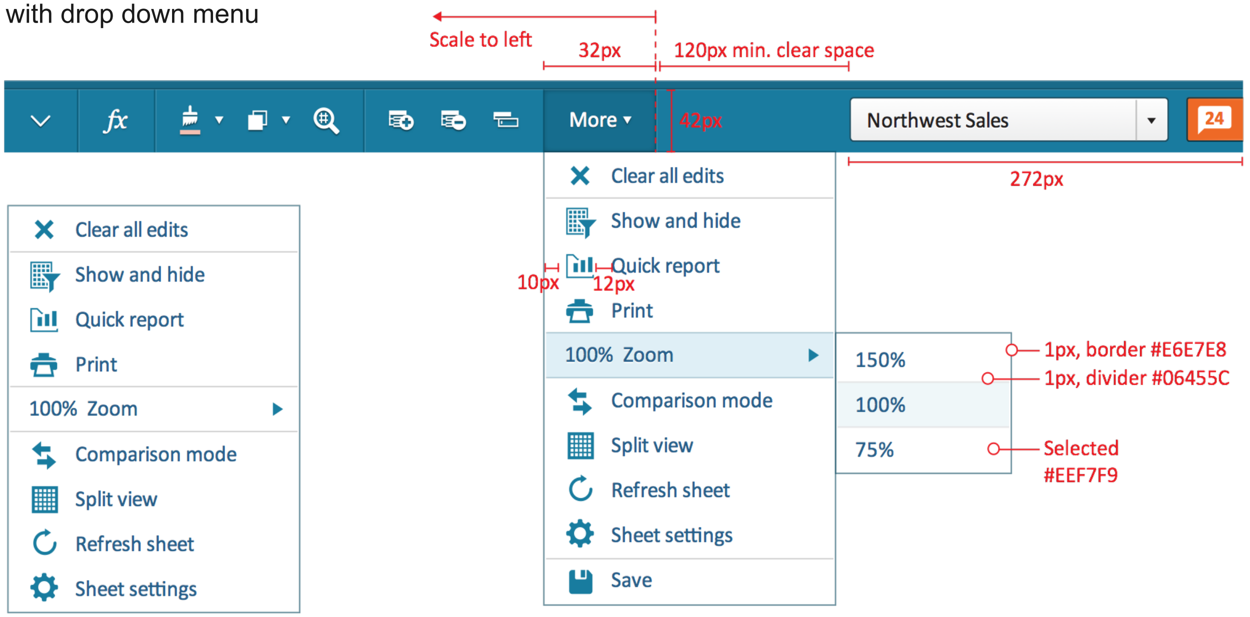
Toolbar

Approved



4px
6px
fx
32px
100%
Northwest Sales
24
48px
10px
4px
10px
32px
#135C78 left 1px stroke
#3D8DAA right 1px stroke
218px
40px
12px
6px
6px
Level
All
Customer
All
Account
All
42px
6px

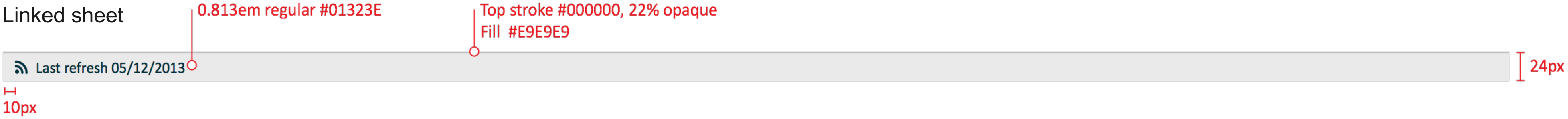
Scaled toolbar
with drop down menu



Scale to left
32px
120px min. clear space
fx
More
42px
Northwest Sales
24
272px
Clear all edits
Show and hide
Quick report
Print
100% Zoom
Comparison mode
Split view
Refresh sheet
Sheet settings
Clear all edits
Show and hide
10px
12px
Quick report
Print
100% Zoom
Comparison mode
Split view
Refresh sheet
Sheet settings
Save
150%
100%
75%
1px, border #E6E7E8
1px, divider #06455C
Selected
#EEF7F9

Secondary toolbars

Linked sheet



Last refresh 05/12/2013

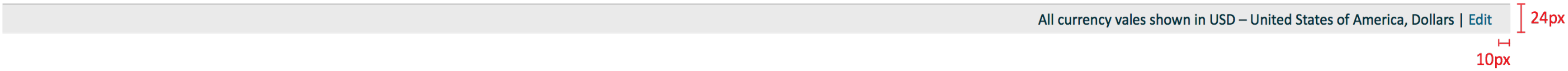
0.813em regular #01323E

Top stroke #000000, 22% opaque
Fill #E9E9E9

24px

10px

Currency display

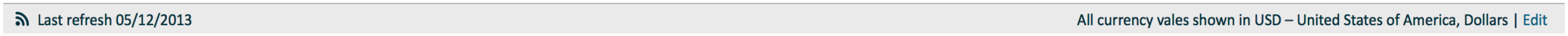


All currency vales shown in USD – United States of America, Dollars | Edit

24px

10px

Linked sheet with currency display



Last refresh 05/12/2013

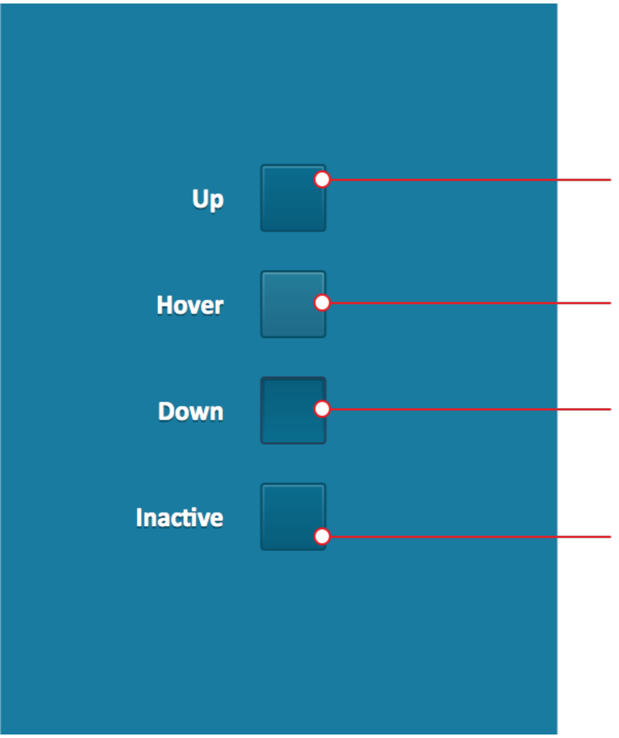
All currency vales shown in USD – United States of America, Dollars | Edit

If both data pieces are visible, push them to the same element.

Sheets

Toolbar button states

Approved



Gradient: top #156C8C, bottom #135E7C
1px inner stroke, #074F68
1px inner stroke, offset -1px, gradient: top #FFFFFF 20% opaque

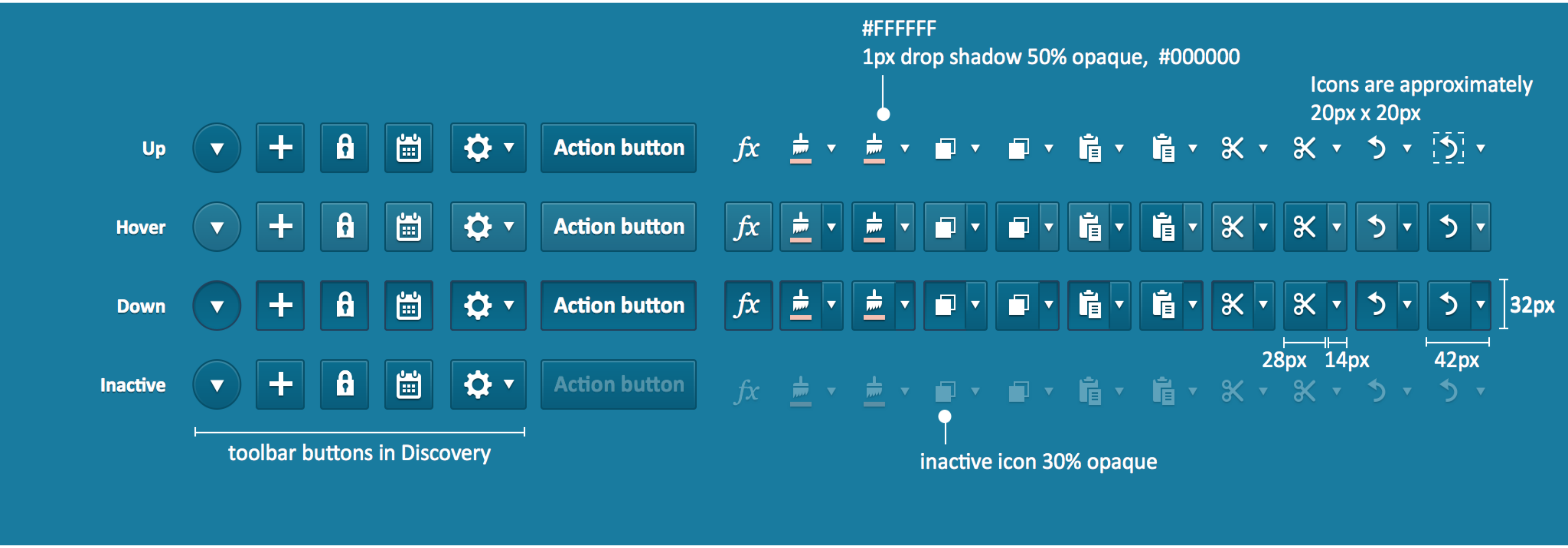
Gradient: top #2B7D98, bottom #266D89
***Inner stroke same as specs for Up state**

Gradient: top #125E7B, bottom #156C8C
1px inner stroke, #23415C
1px inner stroke, offset -1px, gradient: top #000000 20% opaque

Gradient: top #2B7D98, bottom #266D89
***Inner stroke same as specs for Up state**

Toolbar button states

Approved


Up
Hover
Down
Inactive
Action button
Action button
Action button
Action button
fx
32px
28px
14px
42px

#FFFFFF
1px drop shadow 50% opaque, #000000

Icons are approximately 20px x 20px

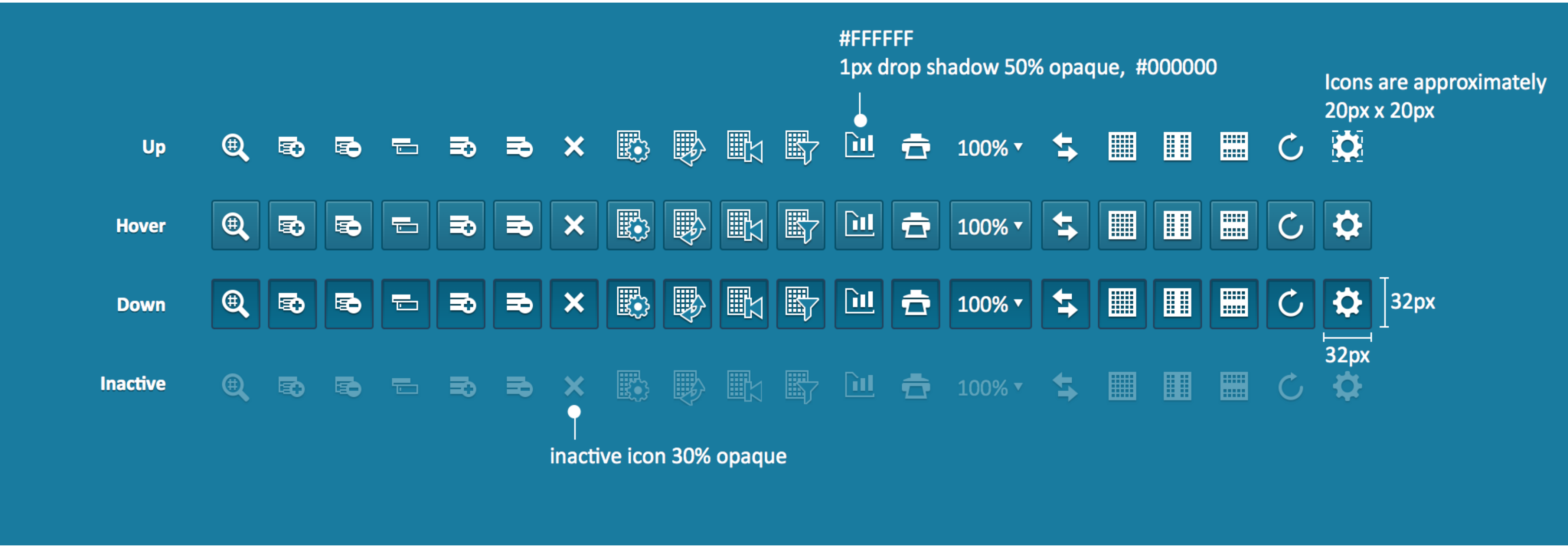
toolbar buttons in Discovery

inactive icon 30% opaque

Sheets

Toolbar button states

✓ Approved


Up
Hover
Down
Inactive
100%
32px
32px

#FFFFFF
1px drop shadow 50% opaque, #000000

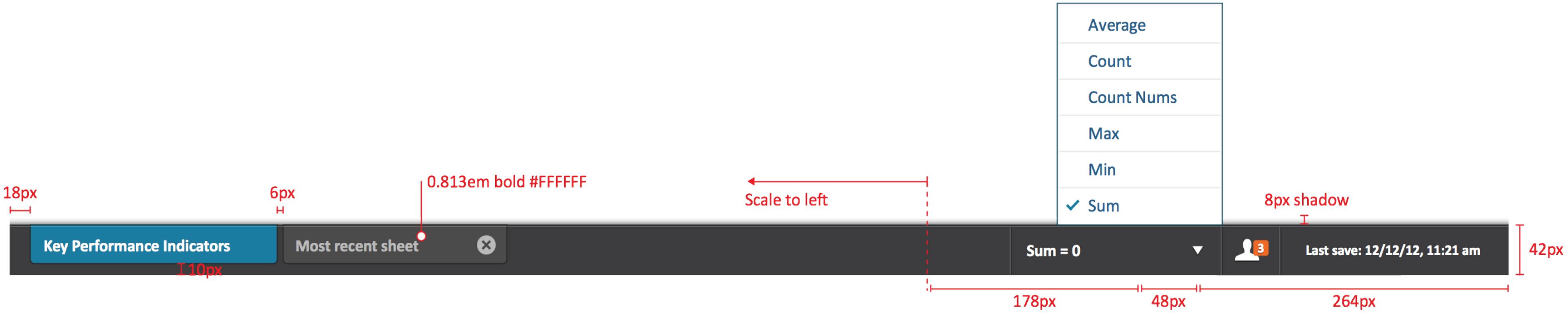
Icons are approximately 20px x 20px

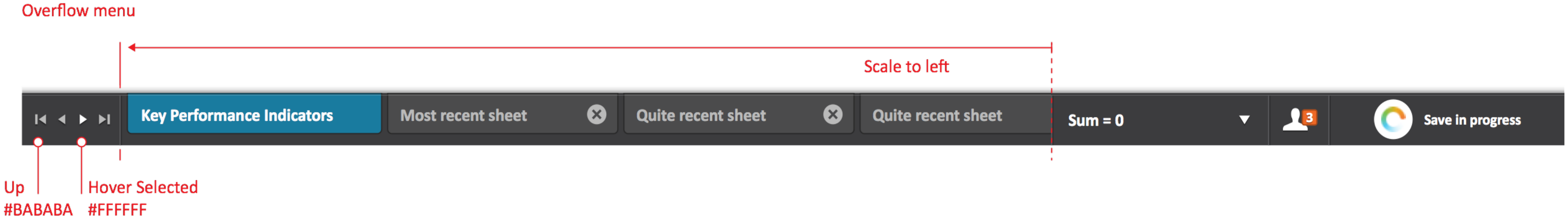
inactive icon 30% opaque

Sheets

Action bar

Approved


Average
Count
Count Nums
Max
Min
✓ Sum
18px
6px
0.813em bold #FFFFFF
Scale to left
8px shadow
Key Performance Indicators
10px
Most recent sheet
Sum = 0
3
Last save: 12/12/12, 11:21 am
42px
178px
48px
264px


Overflow menu
Scale to left
Key Performance Indicators
Most recent sheet
Quite recent sheet
Quite recent sheet
Sum = 0
3
Save in progress
Up
#BABABA
Hover Selected
#FFFFFF

Overflow Menu
Controls behave identical to Excel where arrows are used to scroll through the tab list. Click on the direct back or forward button to go to the beginning or end of the list.

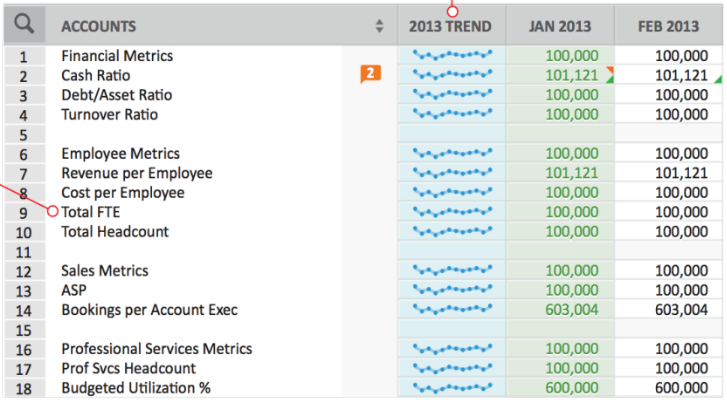
Sheets

Cell sizes

#5A5A5C
0.750em regular
Drop shadow 1px #FFFFFF, 30% opaque

14px cell height

0.750em regular
#211F1F



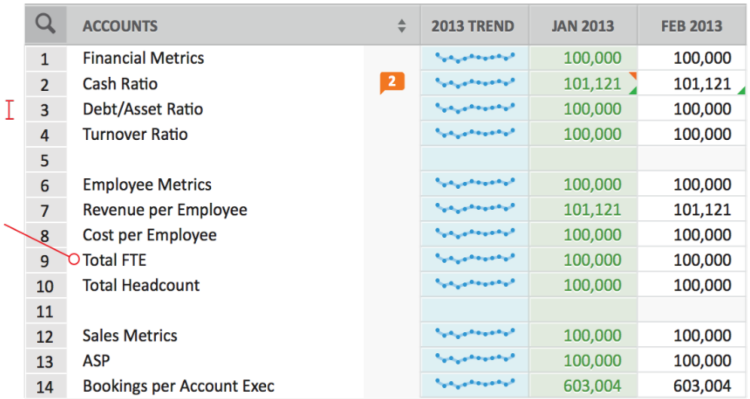
	ACCOUNTS		2013 TREND	JAN 2013	FEB 2013
1	Financial Metrics			100,000	100,000
2	Cash Ratio	2		101,121	101,121
3	Debt/Asset Ratio			100,000	100,000
4	Turnover Ratio			100,000	100,000
5					
6	Employee Metrics			100,000	100,000
7	Revenue per Employee			101,121	101,121
8	Cost per Employee			100,000	100,000
9	Total FTE			100,000	100,000
10	Total Headcount			100,000	100,000
11					
12	Sales Metrics			100,000	100,000
13	ASP			100,000	100,000
14	Bookings per Account Exec			603,004	603,004
15					
16	Professional Services Metrics			100,000	100,000
17	Prof Svcs Headcount			100,000	100,000
18	Budgeted Utilization %			600,000	600,000

80px default minimum width

14px cell height, 0.750em regular, 75% zoom

18px cell height

0.813em regular
#211F1F



	ACCOUNTS		2013 TREND	JAN 2013	FEB 2013
1	Financial Metrics			100,000	100,000
2	Cash Ratio	2		101,121	101,121
3	Debt/Asset Ratio			100,000	100,000
4	Turnover Ratio			100,000	100,000
5					
6	Employee Metrics			100,000	100,000
7	Revenue per Employee			101,121	101,121
8	Cost per Employee			100,000	100,000
9	Total FTE			100,000	100,000
10	Total Headcount			100,000	100,000
11					
12	Sales Metrics			100,000	100,000
13	ASP			100,000	100,000
14	Bookings per Account Exec			603,004	603,004

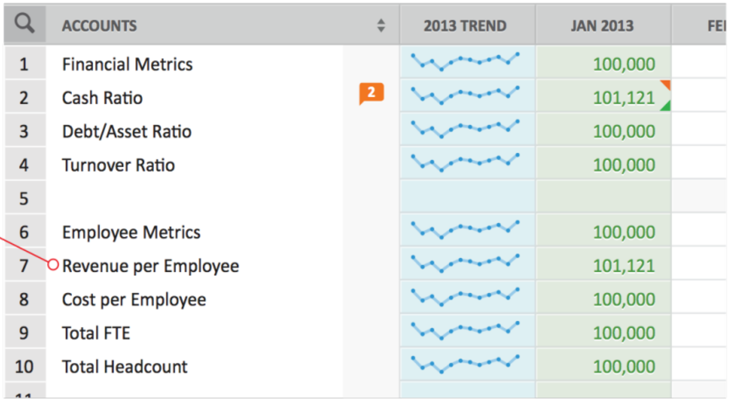
Default for Web

80px default minimum width

18px cell height, 0.813em regular, 100% zoom

24px cell height

0.875em regular
#211F1F



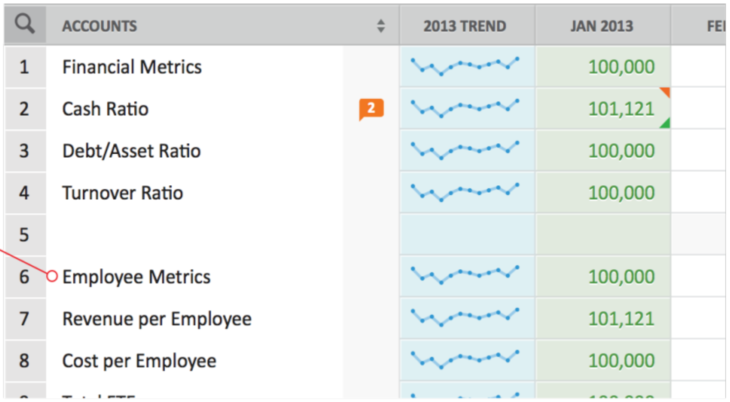
	ACCOUNTS		2013 TREND	JAN 2013	FEI
1	Financial Metrics			100,000	
2	Cash Ratio	2		101,121	
3	Debt/Asset Ratio			100,000	
4	Turnover Ratio			100,000	
5					
6	Employee Metrics			100,000	
7	Revenue per Employee			101,121	
8	Cost per Employee			100,000	
9	Total FTE			100,000	
10	Total Headcount			100,000	

100px default minimum width

24px cell height, 0.875em regular, 125% zoom

30px cell height

0.938em regular
#211F1F



	ACCOUNTS		2013 TREND	JAN 2013	FEI
1	Financial Metrics			100,000	
2	Cash Ratio	2		101,121	
3	Debt/Asset Ratio			100,000	
4	Turnover Ratio			100,000	
5					
6	Employee Metrics			100,000	
7	Revenue per Employee			101,121	
8	Cost per Employee			100,000	

Default for Tablet

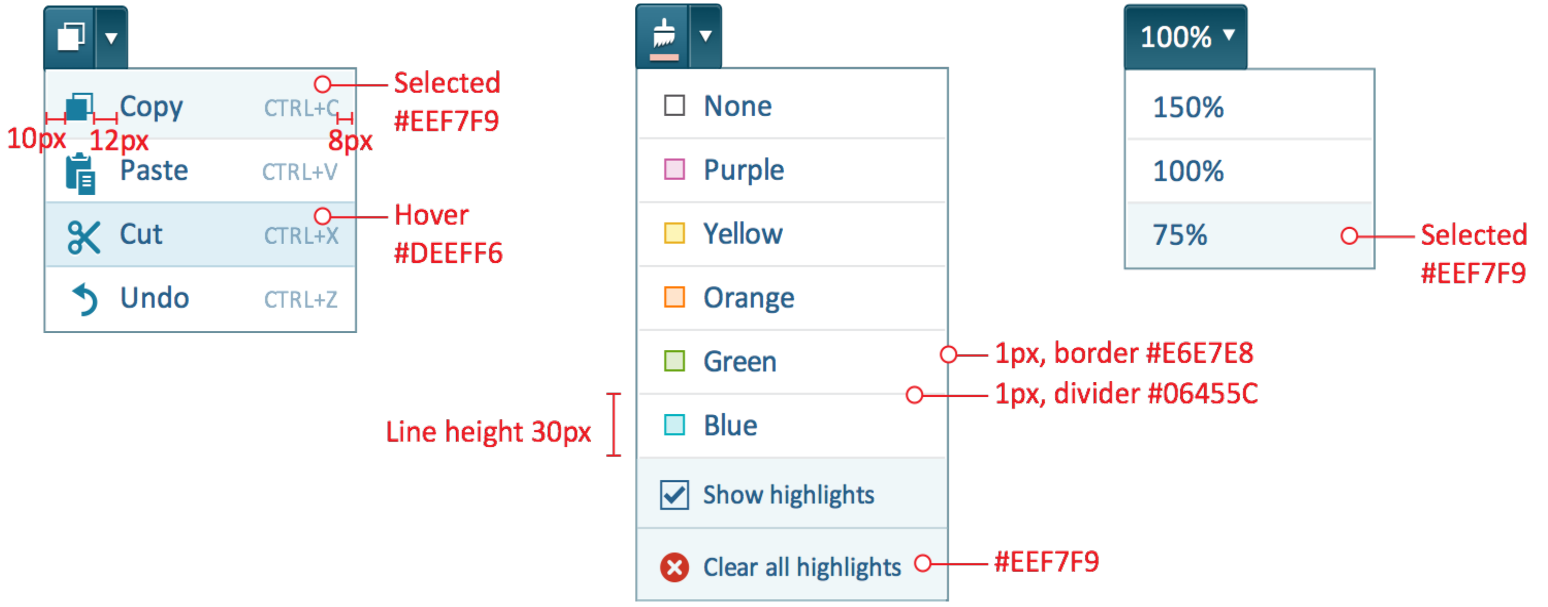
100px default minimum width

30px cell height, 0.938em regular, 150% zoom

Sheets

Drop down

Approved


Copy CTRL+C
Paste CTRL+V
Cut CTRL+X
Undo CTRL+Z
None
Purple
Yellow
Orange
Green
Blue
☑ Show highlights
Clear all highlights
100%
150%
100%
75%

10px 12px 8px

Selected #EEF7F9

Hover #DEEFF6

Line height 30px

1px, border #E6E7E8

1px, divider #06455C

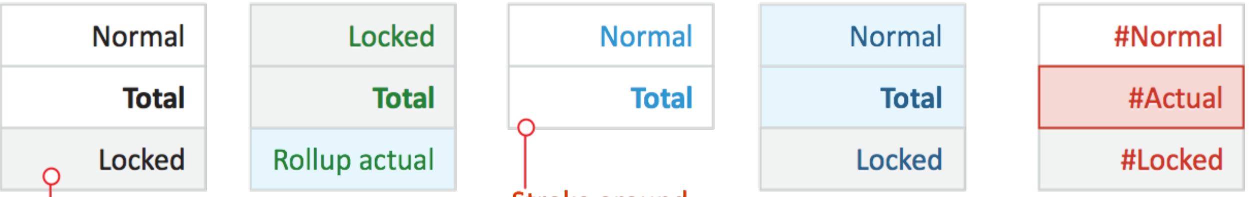
#EEF7F9

Selected #EEF7F9

Sheets

Cell states

Approved



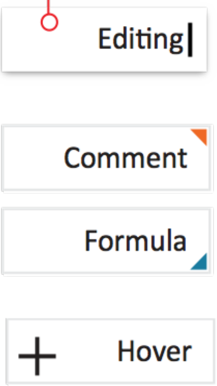
Defaults	Actuals: #238236	Unsaved: #2d96d0	Rollups: #26608b	Error: #cc3525
Normal	Locked	Normal	Normal	#Normal
Total	Total	Total	Total	#Actual
Locked	Rollup actual		Locked	#Locked

#f5d7d3, 1px stroke #cc3525

Background #f1f2f2

Stroke around #d0d3d4 cells

No border
Shadow: 50% opaque, #000, size 2px, Y+1



Editing

Comment

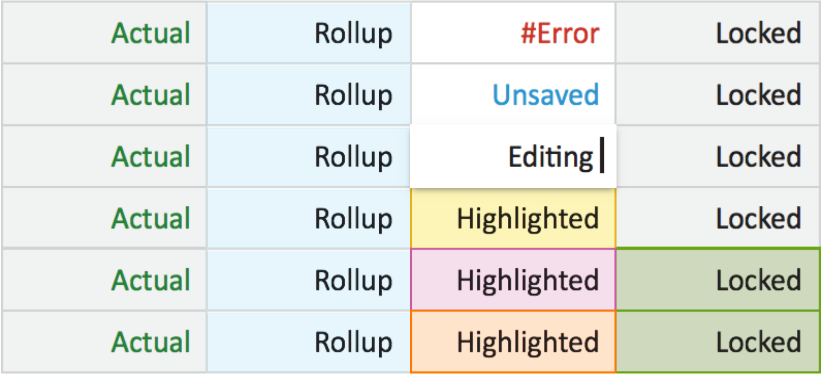
#ef6925

Formula

#197b9f

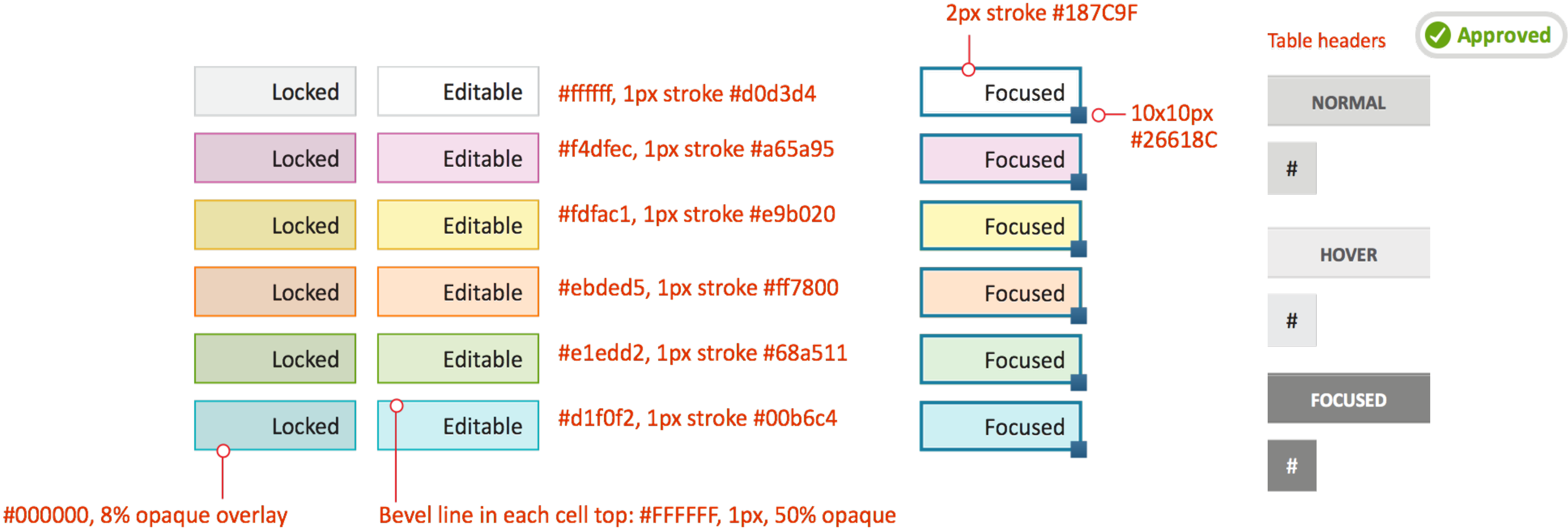
Hover

Display mousecursor
as “crosshair” on hover
over editable cells
switch to “text” on edit



Actual	Rollup	#Error	Locked
Actual	Rollup	Unsaved	Locked
Actual	Rollup	Editing	Locked
Actual	Rollup	Highlighted	Locked
Actual	Rollup	Highlighted	Locked
Actual	Rollup	Highlighted	Locked

Cell states, highlight and focus



2px stroke #187C9F

Table headers ✓ Approved

Locked	Editable	#ffffff, 1px stroke #d0d3d4	Focused
Locked	Editable	#f4dfec, 1px stroke #a65a95	Focused
Locked	Editable	#fdfac1, 1px stroke #e9b020	Focused
Locked	Editable	#ebded5, 1px stroke #ff7800	Focused
Locked	Editable	#e1edd2, 1px stroke #68a511	Focused
Locked	Editable	#d1f0f2, 1px stroke #00b6c4	Focused

10x10px
#26618C

NORMAL
#

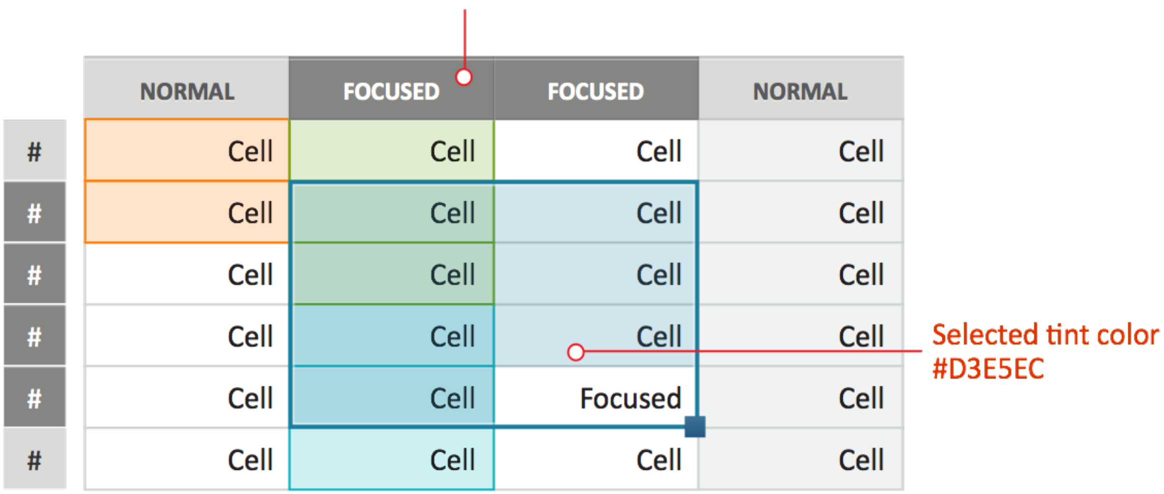
HOVER
#

FOCUSED
#

#000000, 8% opaque overlay

Bevel line in each cell top: #FFFFFF, 1px, 50% opaque

Highlight selected rows and column headers too

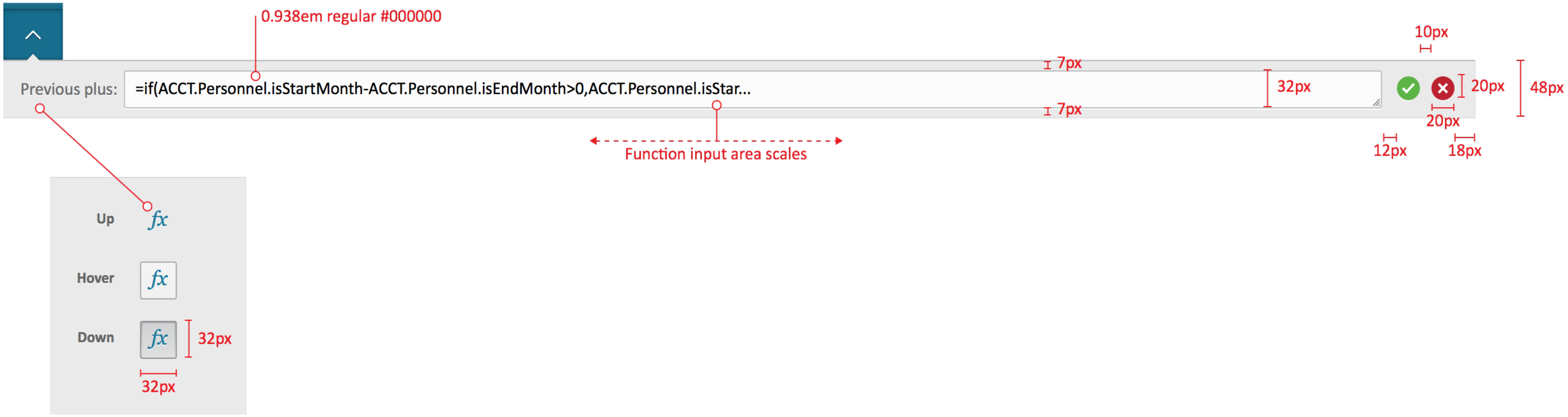


	NORMAL	FOCUSED	FOCUSED	NORMAL
#	Cell	Cell	Cell	Cell
#	Cell	Cell	Cell	Cell
#	Cell	Cell	Cell	Cell
#	Cell	Cell	Cell	Cell
#	Cell	Cell	Focused	Cell
#	Cell	Cell	Cell	Cell

Selected tint color
#D3E5EC

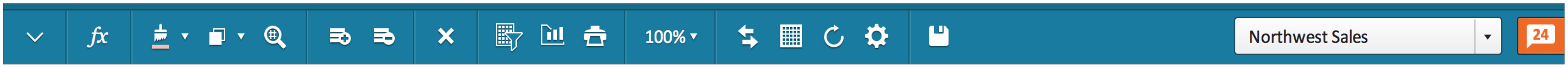
Formula toolbar

Approved



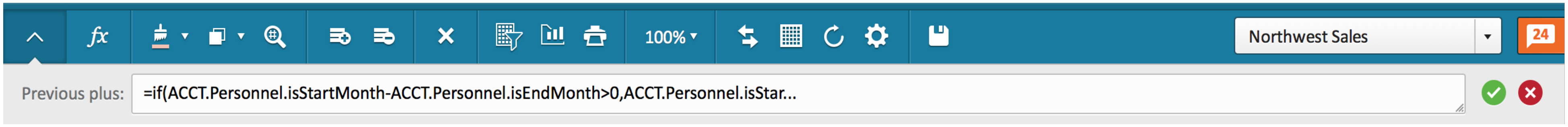
Previous plus: =if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

0.938em regular #000000
7px
32px
7px
Function input area scales
10px
20px
48px
20px
12px
18px
Up
Hover
Down
32px
32px



100%

Northwest Sales

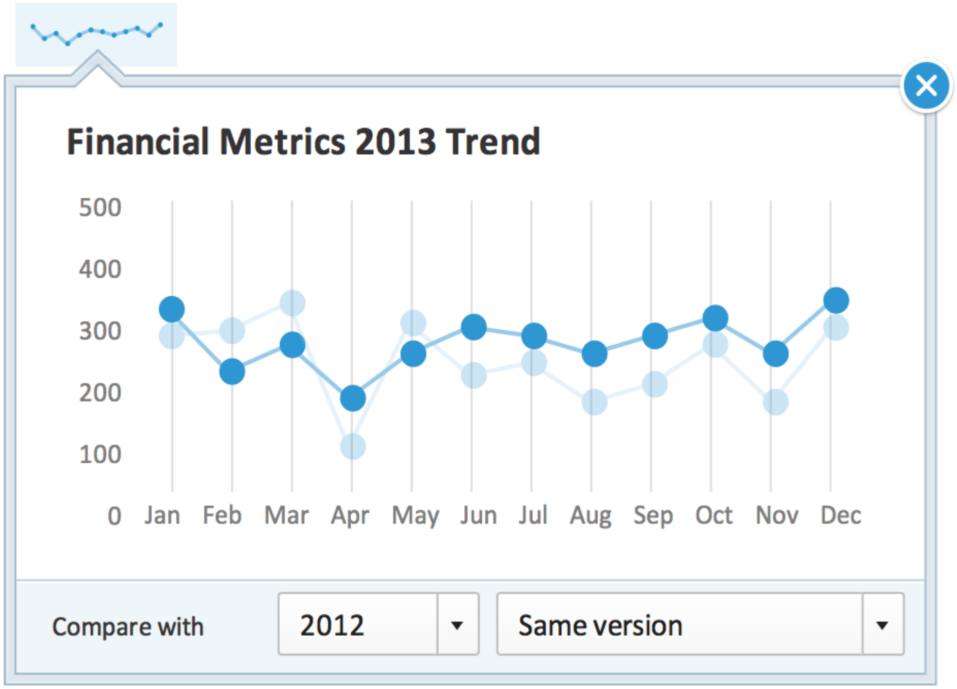


100%

Northwest Sales

Previous plus: =if(ACCT.Personnel.isStartMonth-ACCT.Personnel.isEndMonth>0,ACCT.Personnel.isStar...

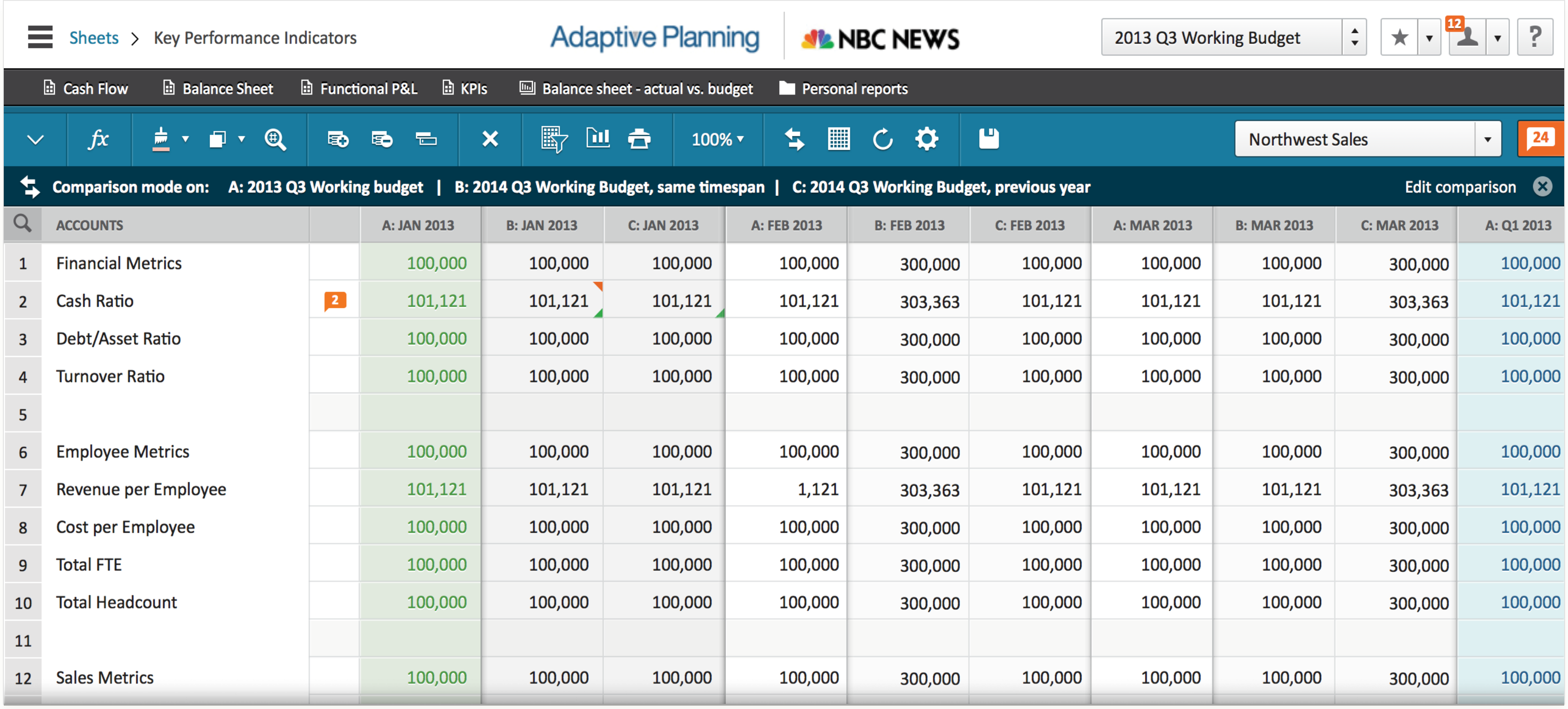
Trendline


Financial Metrics 2013 Trend
500
400
300
200
100
0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

Compare with 2012 Same version

Sheets

Version comparison mode



Sheets > Key Performance Indicators

Adaptive Planning | NBC NEWS

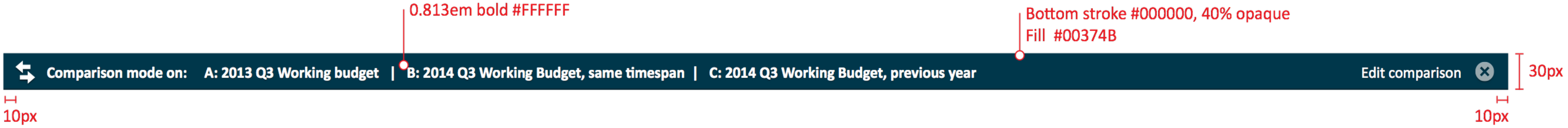
2013 Q3 Working Budget

Cash Flow | Balance Sheet | Functional P&L | KPIs | Balance sheet - actual vs. budget | Personal reports

100% | Northwest Sales | 24

Comparison mode on: A: 2013 Q3 Working budget | B: 2014 Q3 Working Budget, same timespan | C: 2014 Q3 Working Budget, previous year Edit comparison

	ACCOUNTS		A: JAN 2013	B: JAN 2013	C: JAN 2013	A: FEB 2013	B: FEB 2013	C: FEB 2013	A: MAR 2013	B: MAR 2013	C: MAR 2013	A: Q1 2013
1	Financial Metrics		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
2	Cash Ratio	2	101,121	101,121	101,121	101,121	303,363	101,121	101,121	101,121	303,363	101,121
3	Debt/Asset Ratio		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
4	Turnover Ratio		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
5												
6	Employee Metrics		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
7	Revenue per Employee		101,121	101,121	101,121	1,121	303,363	101,121	101,121	101,121	303,363	101,121
8	Cost per Employee		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
9	Total FTE		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
10	Total Headcount		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000
11												
12	Sales Metrics		100,000	100,000	100,000	100,000	300,000	100,000	100,000	100,000	300,000	100,000



0.813em bold #FFFFFF

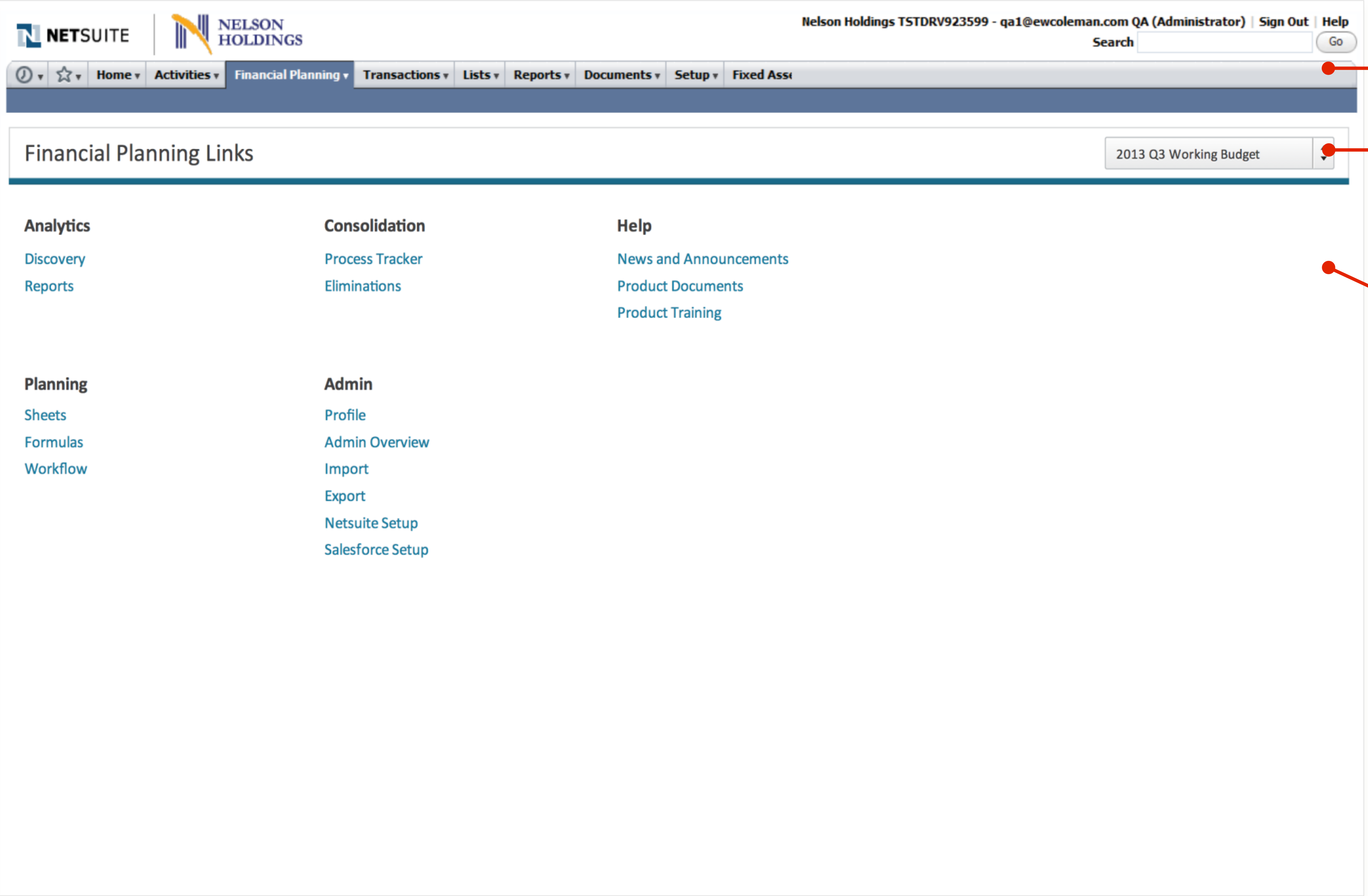
Bottom stroke #000000, 40% opaque
Fill #00374B

Comparison mode on: A: 2013 Q3 Working budget | B: 2014 Q3 Working Budget, same timespan | C: 2014 Q3 Working Budget, previous year Edit comparison

Netsuite

Netsuite

Navigation page


NETSUITE
NELSON HOLDINGS
Nelson Holdings TSTDRV923599 - qa1@ewcoleman.com QA (Administrator) | Sign Out | Help
Search
Go
Home
Activities
Financial Planning
Transactions
Lists
Reports
Documents
Setup
Fixed Ass
2013 Q3 Working Budget

Financial Planning Links

Analytics
- Discovery
- Reports

Consolidation
- Process Tracker
- Eliminations

Help
- News and Announcements
- Product Documents
- Product Training

Planning
- Sheets
- Formulas
- Workflow

Admin
- Profile
- Admin Overview
- Import
- Export
- Netsuite Setup
- Salesforce Setup

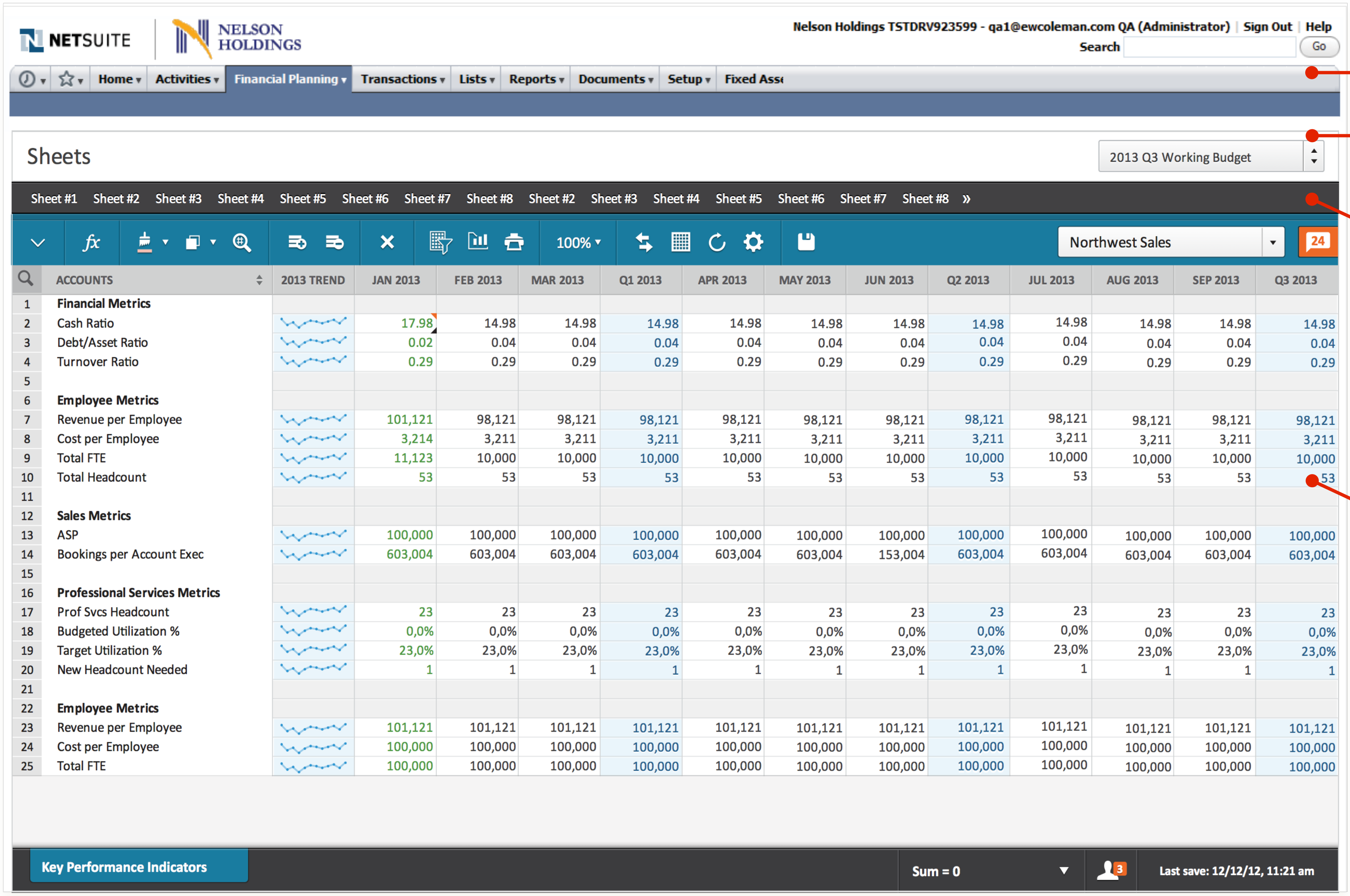
Netsuite standard navigation

Page header, version control shown on right.

Full page navigation menu as in current product.

Netsuite

Page header and navigation


NETSUITE
NELSON HOLDINGS
Sign Out
Help
Search
Go
Home
Activities
Financial Planning
Transactions
Lists
Reports
Documents
Setup
Fixed Ass
Sheets
2013 Q3 Working Budget
Sheet #1
Sheet #2
Sheet #3
Sheet #4
Sheet #5
Sheet #6
Sheet #7
Sheet #8
Sheet #2
Sheet #3
Sheet #4
Sheet #5
Sheet #6
Sheet #7
Sheet #8
»
fx
100%
Northwest Sales
24
Key Performance Indicators
3

Nelson Holdings TSTDRV923599 - qa1@ewcoleman.com QA (Administrator)

	ACCOUNTS	2013 TREND	JAN 2013	FEB 2013	MAR 2013	Q1 2013	APR 2013	MAY 2013	JUN 2013	Q2 2013	JUL 2013	AUG 2013	SEP 2013	Q3 2013
1	**Financial Metrics**													
2	Cash Ratio		17.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98	14.98
3	Debt/Asset Ratio		0.02	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04
4	Turnover Ratio		0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29	0.29
5														
6	**Employee Metrics**													
7	Revenue per Employee		101,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121	98,121
8	Cost per Employee		3,214	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211	3,211
9	Total FTE		11,123	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
10	Total Headcount		53	53	53	53	53	53	53	53	53	53	53	53
11														
12	**Sales Metrics**													
13	ASP		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
14	Bookings per Account Exec		603,004	603,004	603,004	603,004	603,004	603,004	153,004	603,004	603,004	603,004	603,004	603,004
15														
16	**Professional Services Metrics**													
17	Prof Svcs Headcount		23	23	23	23	23	23	23	23	23	23	23	23
18	Budgeted Utilization %		0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
19	Target Utilization %		23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%	23,0%
20	New Headcount Needed		1	1	1	1	1	1	1	1	1	1	1	1
21														
22	**Employee Metrics**													
23	Revenue per Employee		101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121	101,121
24	Cost per Employee		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
25	Total FTE		100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000

Sum = 0

Last save: 12/12/12, 11:21 am

Netsuite standard navigation

Page header, version control shown on right.

Secondary navigation (as the navicon is not in use), similar to current AP build. Sheets overflow to a dropmenu.

Normal product screens, except the Netsuite gutter on left and right edge.

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