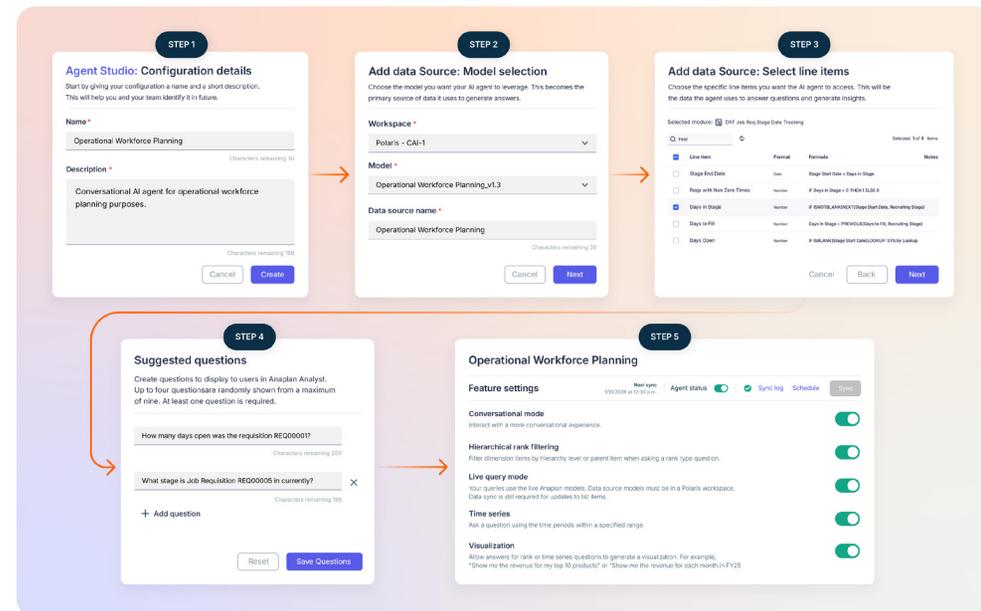# Anaplan Agent Studio

Control Anaplan AI agents. Build and scale centrally.

As more custom AI agents and out-of-the-box agents (also known as analysts) are built across Anaplan applications, organizations will need a unified way to control, deploy and manage them. Building and activating analysts requires manual, application-specific setup, which slows adoption and makes it difficult to scale AI capabilities safely across your planning environment. This leads to governance risks and slow rollout across your planning environment.

Anaplan Agent Studio provides a centralized administrative hub that enables organizations to create, deploy, and manage their Anaplan AI agent portfolio with confidence. From a single control plane, an AI administrator can configure and manage all Anaplan AI agents, including custom agents, intelligent role-based agents, and Anaplan CoModeler, across applications and planning models. With embedded enterprise-grade permissions, Agent Studio provides the trusted infrastructure needed to expand AI adoption securely across the enterprise.

There's a smarter way to plan

Anaplan Agent Studio provides a single, trusted control plane for COEs, senior model builders, platform owners and others who have AI Admin roles, to manage the creation, deployment and activation of AI agents across the enterprise. It allows you to scale AI with confidence, keeping insights secure, explainable, and aligned to your trusted planning data.

"

Anaplan continues to demonstrate strong AI innovation with the introduction of Anaplan CoModeler, Anaplan Custom Analyst and Anaplan Agent Studio. From our delivery experience, these capabilities already provide a more practical and intuitive way for teams to build and interact with planning models, helping accelerate solution development and shorten the path from insight to action. As Anaplan's strategic partner in EMEA, we are actively working with customers to deploy CoModeler, Custom Analyst and Agent Studio today, while partnering closely with Anaplan as the capabilities continue to evolve to support broader, enterprise-scale planning use cases

Chris Minett
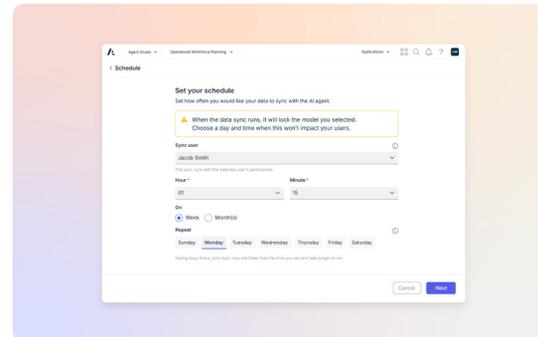Solution Consulting Director at Bedford Consulting

Key Benefits

- **Manage all AI agents from one place:** Build, configure, and deploy all Anaplan AI agents across all applications, models, and workspaces, in one place within your Anaplan platform.

- **Create and deploy Custom Analyst agents for your models:** Create conversational AI agents that understand your model structure, speak your business language, and automatically inherit your existing role-based permissions and dimension security.

- **Embedded native governance and security:** With embedded Anaplan governance and security, custom AI agents operate with consistent permissions and workspace boundaries respecting workflows, role hierarchies, and data access rules.

- **Consistently activate agents across your environment:** Enable AI capabilities across eligible workspaces and applications using a consistent, repeatable process, eliminating manual setup and ensuring all agents follow your organization's standards.
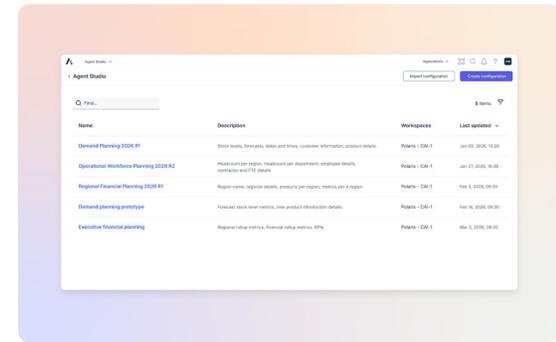
Use cases

Build

- Create and configure new Anaplan Custom Analyst agents for your custom and heavily extended planning models.

- Ensure AI agents understand your model structure, respect your existing security rules, and follow the same governance controls you've already built into your planning environment.

Manage

- Manage all custom and intelligent role-based agents and CoModeler, from a central, built-in admin console.

- Develop and test your custom agents in a controlled environment, then deploy when validation is complete.
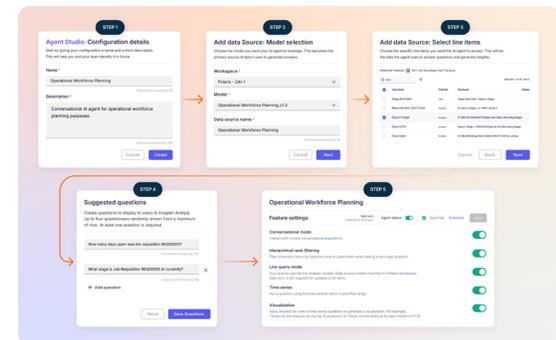
Scale

- Standardize the deployment of your custom agents and intelligent role-based agents across eligible Anaplan applications by selecting the modules and line items for each data source.

- Confidently scale Anaplan AI agents across the enterprise with consistent, repeatable controls.

Four easy steps to build and govern AI agents with Anaplan Agent Studio

STEP 1: Grant Anaplan AI administrators access to Agent Studio

- Open Anaplan and navigate to the administration section.
- In the administration pane, select Users > Internal and select the user who needs access to Agent Studio.
- In the user pane, under the Roles tab, toggle the AI admin switch to on.

STEP 2: Build & configure custom agents

- Use the self-service interface to author and configure new custom agents for your custom planning models.
- AI administrators control configuration content. When multiple AI administrators contribute to a configuration, all contributors can view the entire configuration.
- Define the data source, modules, and line items for each custom agent.
- Add guided starter questions that showcase key use cases and help users unlock insights faster.

STEP 3: Test, validate, and deploy with confidence

- Test your custom agents in your models, validate outputs, iterate confidently, and deploy when ready.
- Agents can be enabled from any page within Agent Studio.

STEP 4: Activate & scale Anaplan AI agents with confidence

- Activate intelligent role-based agents in Anaplan applications and enable CoModeler within designated workspaces using predictable, repeatable processes.
- Custom Analyst access and permissions are based on your existing Anaplan model role.
- Schedule a data sync with your custom agent and data source based on your preferred timeframe.
- A sync log is accessible on any page in Agent Studio and helps you understand if data syncs have been successfully completed.
- Confidently scale the use of all agents across the enterprise, knowing they adhere to your strict governance framework.

Key Features

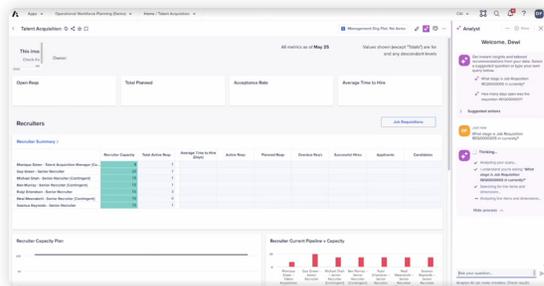### 1. Unified Anaplan AI agent management

- Utilize a platform-embedded administrative experience to manage all Anaplan AI agents.

- Manage custom and intelligent role-based agents and CoModeler from a single interface.

2. Self-service custom agent creation

- Create, configure, and deploy Anaplan custom agents directly within Agent Studio.

- Allow designated AI admins to configure custom agents for specific models.

- Select the modules and line items you want the AI agent to access for each data source.

3. Scalable enterprise AI agent deployment

- Enable a consistent activation process for custom and intelligent role-based agents across all eligible applications, replacing manual deployments with a scalable, repeatable process.

- Control the activation of CoModeler at the workspace level for intentional, secure rollouts.

- Agents can be enabled from any page within Agent Studio.

About Anaplan

Anaplan is a leading AI-driven scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 global brands plan with Anaplan.

To learn more, visit www.anaplan.com

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