Anaplan XL Reporting

Supercharge reporting and ad hoc analysis in data-connected Excel

Anaplan

Today's finance teams are expected to operate with agility and velocity in a rapidly changing business environment that includes evolving market trends, customer needs, and organizational requirements. Plus, they are often challenged by complex business structures, outdated processes, and disparate datasets in fragmented systems that result in reporting misalignment and inaccuracies.

Fast, flexible, intuitive

Unlike other tools, Anaplan XL Reporting goes beyond just dashboards to put finance teams in control of their reporting needs. Designed for the increasing demands placed on finance teams, Anaplan XL Reporting offers more formatting control and ad hoc capabilities by extending data-connected Excel — providing you the flexibility and capabilities for insightful and interactive analysis, reports, and dashboards of company-wide metrics for any stakeholders at any time.

Key benefits

- **Accelerate reporting, no IT needed:** Empower finance teams with a finance-owned, no-code solution with self-serve capabilities for analysis, reporting, and dashboarding to meet challenging delivery timeframes.

- **Real-time, unified financial view:** Seamlessly connect multiple data sources and deliver real-time access to critical financial data. More than 30 built-in data connectors with bi-directional data flow to increase reporting accuracy and drive better analysis and decisions.

- **Increase control and governance:** Ensure governance required by IT while giving finance the flexibility to slice/dice and drill up/down into data with ease.

- **Clearer insights with less effort:** Leverage a library of interactive charts to elevate financial reporting and reduce maintenance with finance-focused, intuitive visualizations connected to a multitude of data sources.

- **Seamless collaboration across devices:** Automate report distribution and share Excel-developed reports and dashboards easily with any stakeholder on web and mobile devices.

- **Quick adoption, immediate value:** Improve time to value with a low learning curve, fast user acceptance in a familiar Excel environment, and visualization that gives finance teams more time to focus on higher-value activities.

BERTELSMANN

Bertelsmann is a media, services, and education company that operates in more than 50 countries with over 80,000 employees worldwide. It includes the entertainment group RTL Group, the trade book publisher Penguin Random House, the music company BMG, the service provider Arvato Group, Bertelsmann Marketing Services, the Bertelsmann Education Group, and Bertelsmann Investments.

Challenges

Bertelsmann's central group reporting team sought:

- **Fast, simple, and flexible access** to an extensive range of financial data.
- **Full control over the way standard reports were designed —** including complex formatting and layout requirements — without having to depend on internal or external IT resources.
- **Management of ad-hoc reporting requests** and support of users who wanted to conduct more comprehensive analysis.

Results

Bertelsmann has used our self-service and analysis reporting products for over a decade and has realized these results:

- Leveraged existing knowledge of Excel, reducing the learning curve for a **high adoption rate.**
- **Eliminated risk** of data storage in Excel.
- **Expanded usage** beyond 30 initial users to 300+ across the business for quality and consistent reports tailored for different audiences.
- **Automated report distribution** using Excel, PDF, or PowerPoint files accessible on web and mobile devices.

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Anaplan XL Reporting gives us the flexibility that we need to efficienctly implement the ever-evolving requirements of our financial reporting."

Senior Director
Business Intelligence at Bertelsmann

Key features

Anaplan XL Reporting enables you to create insightful, interactive, finance-owned reporting for any business audience.

- **Connection and security:** Data connections use industry standard drivers or custom APIs and utilize the security model of the underlying data platform. Data sources include OLAP, relational, and cloud.

- **Ad hoc analysis:** Explore your data with interactive drilling, slice and dice analysis and intuitive user calculations.

- **Financial reporting:** Self-serve creation and maintenance of highly formatted custom layout reports and management packs.

- **Dashboards:** Create custom layout, best practice data-connected dashboards directly in Excel.

- **Interactive charting:** Create interactive, drillable charts with Excel to gain new insights on your business.

- **Report across multiple data sources:** Use one reporting tool to report across different data assets, to give a coherent view of your business on a single page.

- **Reporting flexibility:** Supports interactive grid and graphical reports, formula-based reporting for total control of layout, and pre-defined financial report templates.

- **Web sharing and report bursting:** Share data-connected Excel developed reports with browser and mobile based users by publishing to Anaplan XL Reporting Web. Schedule any published report for automated delivery in PDF, Excel or PowerPoint formats.

- **IBCS certification:** Ensure global standardization and uphold the highest standards of clarity and visual design in every report.

About Anaplan

Anaplan is the only 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 2,400 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

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