

# Reporting with Anaplan

Create engaging, intuitive, impactful reports that drive business decisions.



## Executive Summary

Business leaders and key decision-makers must be ready for any type of change. Regardless of the catalyst of change—market fluctuation, internal drivers, or unexpected external disruption, business leaders must be prepared for how they will manage the organization amid heightened uncertainty. They must be able to easily create, iterate, and reference reports to inform planning scenarios and make decisions in an instant.

Delivering confident reporting hinges on leveraging up-to-date data from across the entire enterprise. This requires a unified platform with intuitive navigation and interface to make reporting accessible to all business users. Anaplan equips decision-makers with advanced reporting capabilities, empowering them to confidently engage and partner with fellow decision-makers to accelerate operational execution and drive positive outcomes.

## A unified platform for engaging reports

Anaplan delivers a unified platform to streamline the reporting processes. Reporting capabilities powered by a seamless user experience (UX) span robust Management Reporting, powerful connectors to enterprise-wide data and efficient extensions to third-party tools, so users can quickly create accurate reports based on a wide range of data.

### Create engaging visual reports

With a single Connected Platform and intuitive UX, end users can easily zero in on data to glean new insights, spot emerging trends, and create “what-if” scenarios to make more informed reports and decisions. With Anaplan-native reporting capabilities, users can visualize their data with a variety of charts and graphs such as Gantt, bubble, scatter, and maps. Users can tailor their dashboards and visualizations to fit the needs of their organization and best articulate their narratives.

### Report with confidence

Access a wide set of data with seamless integrations to third-party sources to create more informed, impactful reports. Anaplan connectors and extensions integrate data in and out of third-party tools and services to create engaging reports based on your organization’s particular needs. These tools sync data between Anaplan and other services with just one click, so users can customize reports to their specifications.

Leverage Anaplan as a planning source-of-truth and seamlessly integrate and report with business intelligence (BI) tools of choice, such as Tableau or Microsoft PowerBI. Easily conduct enterprise-wide reporting that combines Anaplan data with data from enterprise resource planning (ERP), CRM, and other enterprise systems — all without requiring IT support.



### Surveillance Security Company

A surveillance equipment manufacturer was using separate tools for planning and BI, making data collection cumbersome. With Anaplan, they can leverage Anaplan dashboards to easily see financial status at-a-glance and democratize planning. This keeps everyone up-to-date and saves time.



**We like Anaplan dashboards because they are easy to access and use.”**



### Healthcare Company

Forecasting scenarios prior to Anaplan was a tedious manual process for this healthcare company. Moreover, creating polished executive presentations to the C-Suite was a challenge. Anaplan allows them to deliver dynamic executive presentations with a unified platform for planning, scenario modeling, and reporting.



**Quarterly reviews and 10-year plans come to life with highly-visual dashboards and live scenario modeling.”**

## A multi-pronged approach to confident reporting

Anaplan's multi-pronged approach to reporting delivers a seamless experience that simplifies the complexity of disparate reporting processes. Through an intuitive UX, powerful extensions, and connectors, Anaplan empowers business users and key stakeholders to make more informed decisions with speed and confidence.

### Intuitive user experience

With Anaplan's intuitive UX, a broad range of visualization, online reporting, and analysis are available to tailor to a variety of unique scenarios. Customizable visualizations help users make sense of data and spot trends. In addition, they help teams improve forecasts, analyses, and decision-making by viewing data across timelines, plots, maps, and charts.

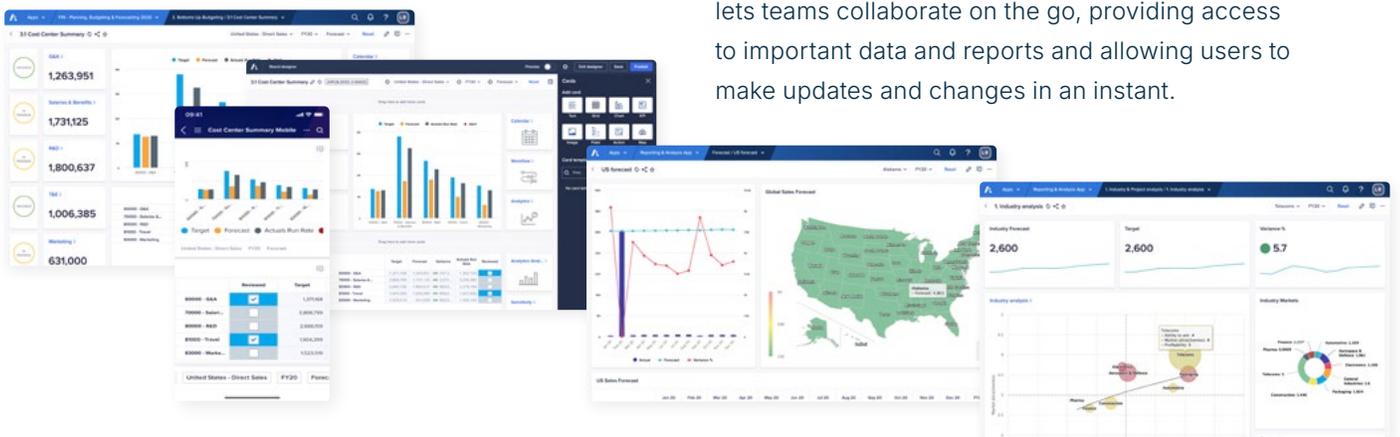
In particular, powerful visualizations such as scatter plot and bubble charts reveal data correlation and inter-relation to shape a compelling visual narrative. Donut charts help demonstrate a part-to-whole relationship and waterfall axis rotation lets users visualize data as a vertical waterfall chart to view more data in vertical scroll for better analysis. Users can easily design their dashboards with capabilities like "view designer," which enables creation of custom views where users can pivot, filter, sort, select, and analyze data.

With Gantt charts, users can plan projects proactively to spot and remediate potential bottlenecks quickly. Users can leverage conditional formatting to color-code a bar or milestone based on their business logic. For example, teams can easily track if a project is over/under budget or under resourced with a milestone or bar set to a specific color. For example, you could make a milestone red if it is overdue.

Maps allow users to create heatmaps for different countries and states, and regions based on conditional formatting. From there, users can drill down deeper into worksheets where they can consider detailed analysis and edit specific data.

Teams can extract key insights quickly with usability features. Keyboard shortcuts help users make updates fast. They can also filter and sort the data in any grid, and maximize grids to deep dive into areas of interest. Users can also edit data in a specific portion of a grid to see the impact of "what-if" scenarios on a granular level. Adding sparklines to KPI cards also helps users quickly spot patterns among the most important data points to identify high- and low- performing KPIs.

Individual end users can also take advantage of UX features. The "my pages" feature lets users create custom self-service reports to see the specific data they need. They can also view key metrics with boards. Board PDF exports allow users to focus on point-in-time data and scenarios with snapshots that are easy to share and print. The mobile app lets teams collaborate on the go, providing access to important data and reports and allowing users to make updates and changes in an instant.





European shipping company gains confidence in data accuracy



Beyond the significant time savings and efficiency we expect to see, reporting in Anaplan will give our management team greater confidence in our numbers — and their consistency — knowing every report is built right in the Anaplan platform. It will really heighten the value of our planning,”

**Jonas Perhage**

Head of Corporate Planning & Control at Stena Line



Sales engagement platform company streamlines planning with Variance Reporting



Anaplan's Management Reporting dashboards allow our executives and our department leaders to access both their forecasted budget and their actualized spend. And with the new variance enhancements being introduced finance can now create templated views for all department leaders in order to simplify annual planning while navigating current expense variances.”

**Robbie Phelps**

Anaplan Architect at Outreach.io

### Robust Management Reporting

Further extending the UX reporting capabilities, Anaplan Management Reporting allows users to create highly formatted, customized reports to share insights across the organization. It delivers feature sets that underscore the key value propositions of Anaplan Management Reporting and empower business leaders to sharpen decisions and performance.

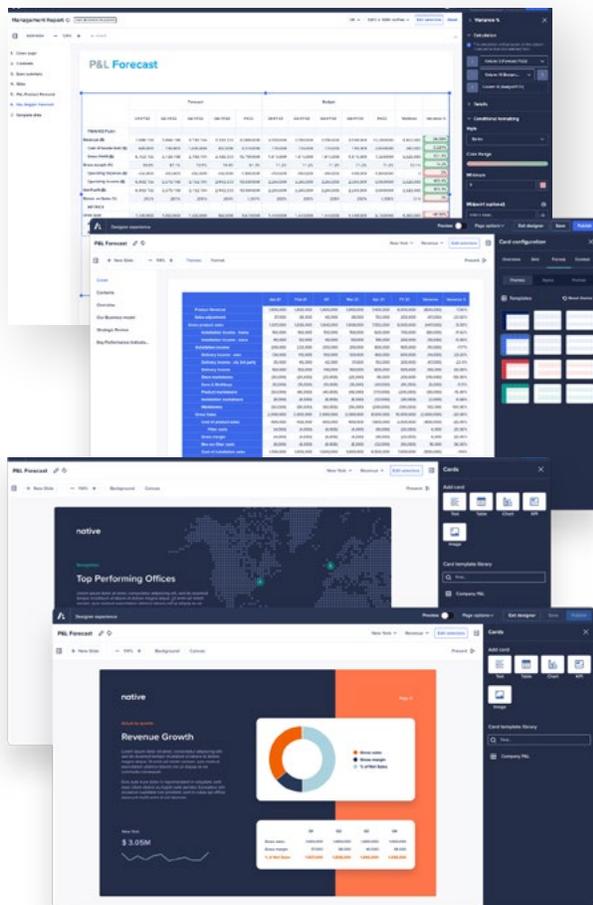
**Report at the speed of business.** Structured and real-time reporting capabilities allow page builders to easily create pre-built reports for stakeholders. Quickly turn around pre-existing reports with real-time data and highlight the status of the most important plans, budgets, and insights that resonate with stakeholders. Easily calculate both the numerical and percentage variance values of any two selected columns directly on the face

of the report to facilitate comparisons between actual and forecast numbers, thus making it easier to zero in on areas that need the most attention.\* When updated reports are ready, simply export them to share multi-page report packages that are stakeholder-ready so decision-makers can identify critical information and act fast.

**Convey key points clearly and effectively.** Bringing data narratives to life with rich, dynamic text cards and context capabilities, model builders enable stakeholders to easily understand new insights. Emphasize important points with flexible styling options and break out long reports into individual slides to help make the most critical content easily digestible. In addition, leverage customization options, including pre-defined table themes and apply different colors to report backgrounds, charts, and tables.

\* Targeted for general availability in H2 2022.

**Tailor the right reports for any audience.** Instill confidence by creating visually compelling board-ready reports that can be shared with a range of audiences across the business. For example, reports can be built to showcase standardized quota letters, commission statements, or important leadership metrics with management. Furthermore, reports can be juxtaposed to facilitate comparison of projected and actual data. As even more robust features come online, report pages will become increasingly more customizable to meet the needs of diverse audience.



## Powerful connectors

Join data with other data sources to efficiently answer key business questions.

Data integration tools allow users to leverage Anaplan as a single-source-of-truth. Anaplan integrations bring data from a variety of sources including on-premises, Software-as-a-Service, and the cloud into the centralized platform. Anaplan HyperConnect, powered by Informatica, integrates data from any source in just a few clicks, expediting planning and reporting. In addition, Anaplan CloudWorks™ puts data integration into the hands of the business users, allowing them to easily orchestrate integrations with both external and internal sources, such as Anaplan models, scheduling and automating processes.

For organizations that want to conduct enterprise-wide reporting with other systems, Anaplan BI tools and connectors seamlessly integrate data. The Anaplan Connector for Tableau delivers powerful visualization and analysis to complement planning in Anaplan so users can understand market changes and glean insights. With the Workiva connector, users can transform planning by importing data to create narrative reports and forecast summaries. The Anaplan Connector for Power BI allows users to easily pull data into and out of Power BI, so they can visualize data and act based on critical information. Companies already using Power BI to integrate with Anaplan can give employees to access more data in their decision-making systems.

## Efficient extensions

Anaplan UX delivers all of the capabilities users need for effective online reporting and users who want to conduct offline reporting with their productivity tools of choice can leverage Anaplan for Microsoft 365 (AM365).\*

\* Targeted for general availability in H2 2022.

You can now extend the capabilities of Connected Reporting to Microsoft 365 applications for precise, reliable reporting, planning, and ad hoc analysis, by adding multiple UX cards from multiple Anaplan Models in the same sheet, slide or page. Anaplan offers customers a flexible extension for Microsoft 365 to help users report, present, and collaborate with Anaplan UX cards from their preferred tool of choice in Microsoft's third-party applications.

Anaplan for Excel, PowerPoint, Word, and Google Sheets Add-on allow users create online and offline reports with Anaplan data.



\* Targeted for general availability in H2 2022.

Additionally with the Anaplan Excel Add-in on-prem, users can connect to Anaplan classic module views to insert data on Excel on desktop and eliminate the need for tedious manual data transfer. Easily refresh reports with the latest data from Anaplan, or input data using write-back capabilities and sync data fast.

Teams can use the Anaplan Add-in for PowerPoint on-prem for effortless report creation. Users can connect to Anaplan classic module views to insert charts, tables, and text components in PowerPoint to smoothly create reports in the format of their choice. One-click refreshes ensure that reports always incorporate the latest data for highly accurate, visualized reports.

The Anaplan Add-on for Google Sheets enables users to connect to Anaplan classic module views and analyze, report, and collaborate efficiently with Anaplan when using Google Sheets. Anaplan users can analyze data in their familiar tool to create their standard company reports and to collaborate with colleagues. Users can efficiently and seamlessly create connections to Anaplan from Google Sheets. Once the connection has been created, it can be refreshed with the latest data to ensure that the reports always use the latest source of truth.



## Key benefits

- Increase visibility into every asset, resource, risk, and change across disparate functions in the enterprise.
- Plot and pivot “what-if” scenarios to model options and pursue winning actions.
- Collaborate and target future planning implications and ultimate business outcomes.
- Shift from reactive to proactive decision-making.
- Drive better forecasting, gain end-to-end visibility, and reduce operational risk.
- Cast a financial line-of-sight into enterprise-wide operations.
- Strategically scenario-manage endless possibilities to best position for market opportunities and upheavals.
- Confidently anticipate the right moves to optimize revenue, cost, and profit.



## Conclusion: Simplify the reporting process with Anaplan

Anaplan’s unified reporting capabilities help teams drive increased productivity. Capabilities span an easy-to-use UX and streamlined connectors and extensions to third-party tools and data so users can efficiently create engaging visual reports based on the most recent set of information. These capabilities equip key decision-makers with the most informed set of data as a single source of truth, empowering more meaningful and agile decisions across the organization.

### 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](http://www.anaplan.com)

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