



Anaplan Global Enablement

Anaplan Course Catalog

Last updated March 28, 2016

Certifications

Having the right people, in the right role, with the right knowledge, is critical to your success with Anaplan. To help you and your organization be successful, we offer the following certifications.

Official Anaplaner	<p>The Official Anaplaner Certification is available to customers and internal employees, and requires successful completion of all of the class requirements of:</p> <ul style="list-style-type: none">101: Foundations102: Introduction to Model Building<ul style="list-style-type: none">80% or better score on a 50 question final examSuccessful completion of instructor-evaluated final project
Model Builder	<p>The Model Builder Certification is available to partners, internal employees, and customers who want to have an internal Super User. It requires successful completion of all of the class requirements of:</p> <ul style="list-style-type: none">101: Foundations102: Introduction to Model Building<ul style="list-style-type: none">80% or better score on a 50 question final examSuccessful completion of instructor-evaluated final project201: Intermediate Model Building<ul style="list-style-type: none">80% or better score on a 50 question final exam340: Agile Implementation Methodology for Customers and Partners<ul style="list-style-type: none">Completion of the 340: Agile Implementation Methodology for Customers and Partners SCORM package
Solution Architect	<p>The Solution Architect Certification is available to partners and internal employees, and requires successful completion of all of the class requirements below, as well as three months of active Anaplan project experience, as verified by Anaplan's Partner Readiness.</p> <ul style="list-style-type: none">101: Foundations102: Introduction to Model Building<ul style="list-style-type: none">80% or better score on a 50 question final examSuccessful completion of instructor-evaluated final project201: Intermediate Model Building<ul style="list-style-type: none">80% or better score on a 50 question final exam340: Agile Implementation Methodology for Customers and Partners<ul style="list-style-type: none">Completion of the 340: Agile Implementation Methodology for Customers and Partners SCORM package401: Solution Architect<ul style="list-style-type: none">Successful completion of instructor-evaluated final project within three months of completion of the classroom portion of the class.

101: Foundations

Get up to speed on the Anaplan platform. While this is not intended to be a deep-dive into building models, and is general information not specific to your Anaplan build, this will give you a good overview of Anaplan and what it does.

Time Commitment	25-35 minutes; no enrollment period
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	None
To Enroll	Enroll yourself via the Learning Center
Learning Objectives	By the end of this class, you'll understand... <ul style="list-style-type: none">• Who Anaplan is• What the Anaplan platform is• What Anaplan means to your role and others within your company• Basic Anaplan navigation and terms
Completion Requirements	Completion of video course with interactive elements
Course Outline	Welcome & Process Welcome to 101: Anaplan Foundations Introduction About Anaplan Introduction to Anaplan Details So what is the platform? Adding items Changing views Even more Platform summary
Delivery Methods	On Demand only

102: Introduction to Model Building

In this class, you'll learn about what Anaplan is, and gain a solid understanding of what Anaplan offers by working with a pre-designed Financial Planning & Analysis (FP&A) model. You'll learn about the basic building blocks of Anaplan, the App Hub, and how to access, use, and design basic models. Upon successful completion of this class, you'll be a certified Official Anaplaner!

Time Commitment	15-25 hours; three (3) week enrollment period
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	<p>By the end of this class, you should be able to:</p> <ul style="list-style-type: none"> • Explain the purposes and function of Anaplan and App Hub • Identify the basic building blocks of Anaplan • Demonstrate how to access and use basic model building features • Explain design principles & translate model schema into a model • Manually import data into modules and lists • Use Blueprint view to add formatting and functionality to data • Create basic formulas within individual models & across other models • Create and design dashboards • Set model access
Completion Requirements	80% or better score on a 50 question final exam; successful completion of instructor-evaluated final project
Course Outline	<ol style="list-style-type: none"> 1. Course Introduction 2. What is Anaplan? 3. Design Matters 4. Start Guided Build 5. Import Model Data 6. Model Blueprint 7. Formulas & Functions 8. Finish Guided Build 9. Create Dashboards 10. Set Access & Roles 11. Certification: Project 12. Certification: Exam
Delivery Methods	<p>On Demand</p> <p>Instructor-Led Want a bit more guidance? Our Anaplan Enablement Consultants and/or Solutions Architects hold virtual classes at least once a quarter in EMEA, and on request worldwide. All material is covered over 2-3 days, at a per-person cost of \$2,500 USD.</p> <p>On Site Please contact Global Enablement for pricing/availability.</p>

201: Intermediate Model Building

Intermediate Model Building is the third in a series of learning courses available through Anaplan's Learning Center either as on-demand training or live instructor-led courses. Before taking this course, you must successfully complete 101: Foundations and 102: Introduction to Model Building.

Time Commitment	6-9 hours; two (2) week enrollment period	
Cost	None	
Audience	Partners, Customers, & Anaplan Employees	
Prerequisite(s)	101: Foundations 102: Introduction to Model Building	
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)	
Learning Objectives	<p>By the end of this class, you'll be able to...</p> <ul style="list-style-type: none"> • Use model-building vocabulary as it relates to Anaplan • Understand and use the various types of lists in Anaplan • Read Model Maps and understand how data flows through an Anaplan model • Build models and dashboards to address bottom-up and top-down planning processes 	
Completion Requirements	80% or better score on a 30 question final exam	
Course Outline	Unit 1: Course Introduction Unit 2: Intermediate Lists Unit 3: Staging Modules Unit 4: Top-Down Introduction Unit 5: Top-Down Modules Unit 6: Region Formula Part 1 Unit 7: Region Formula Part 2 Unit 8: Subregion Goal Set Unit 9: Conditional Formatting Unit 10: Geo Goal Set Dashboard Unit 11: Assumption Modules	Unit 12: Quota Modules Intro/Rep Quota Unit 13: Subregion Quota Module Unit 14: Dependent Dropdowns Unit 15: Capacity Dashboard Part 1 Unit 16: Capacity Dashboard Part 2 Unit 17: Capacity Dashboard Part 3 Unit 18: Functional Areas Unit 19: User Access Unit 20: Breakback and Bulk Copy Intermediate Model Building Exam
Other Delivery Methods	<p>On Demand</p> <p>Instructor-Led</p> <p>Want a bit more guidance? Our Anaplan Enablement Consultants and/or Solutions Architects hold virtual classes at least once a quarter in EMEA, and on request worldwide. All material is covered over 2-3 days, at a per-person cost of \$2,500 USD.</p> <p>On Site</p> <p>Please contact Global Enablement for pricing/availability.</p>	

301: Anaplan Connect

Anaplan Connect enables the Anaplan administrator to automate Anaplan imports of data and lists, and other actions from the client. Find out more about this valuable tool in this course.

Time Commitment	15-30 minutes; no enrollment period
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you'll be able to... <ul style="list-style-type: none">• Use the Anaplan Connect Guide• Download and set up Anaplan Connect• Set up an import file• Get additional information from the Data Integration Community and Anapedia
Completion Requirements	Completion of the 301: Anaplan Connect SCORM package
Course Outline	<ul style="list-style-type: none">• 301: Anaplan Connect SCORM package
Other Delivery Methods	On Demand only

302: Anaplan Connect Wizard

Good Anaplan Connect scripts can be hard to create, especially if you don't know anything about scripting or programming. This course walks you through the use of the unofficial Anaplan Connect Wizard which helps automate the script writing process.

Time Commitment	10-15 minutes; no enrollment period
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you'll be able to... <ul style="list-style-type: none">• Install the Anaplan Connect Wizard on your computer• Create basic scripts using the Anaplan Connect Wizard• Use the Anaplan Connect Wizard to import data from an outside source into Anaplan• Get additional information from the Data Integration Community and Anapedia
Completion Requirements	Completion of the 302: Anaplan Connect Wizard SCORM package
Course Outline	<ul style="list-style-type: none">• 302: Anaplan Connect Wizard SCORM package
Other Delivery Methods	On Demand only

303: Data Integration

Hungry to know more? Anaplan Advanced Topics are deeper dives into specific areas of Anaplan. Data is everywhere, and our customers are eager to know more about how they can get data from their databases and into their models. This process is called data integration, and this course will go over some of the basics.

Time Commitment	30-45 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you'll be able to... <ul style="list-style-type: none">• Define the term data integration• List the data integration options available at Anaplan• Describe the following methods of data integration, and who can use them:<ul style="list-style-type: none">○ Manual○ Anaplan Connect○ ETL○ Native connector○ REST API
Completion Requirements	80% or better score on a 10 question final exam
Course Outline	<ul style="list-style-type: none">• Anaplan Data Integration Basics (final quiz included)
Other Delivery Methods	On Demand only

304: Dashboards

Hungry to know more? Anaplan Advanced Topics are deeper dives into specific areas of Anaplan. In this class, learn all about Dashboards: the face of model planning and reporting-like capabilities...and so much more!

Time Commitment	60-90 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you'll be able to... <ul style="list-style-type: none">• Define the difference between Business Intelligence tools and Anaplan• Identify general categories of Dashboards and describe key features• Differentiate and explain business use cases for Navigation, Input, and Reporting Dashboards
Completion Requirements	80% or better score on a 15 question final exam
Course Outline	<ul style="list-style-type: none">• Anaplan Dashboards• Anaplan Dashboard Roadmap• Anaplan Dashboards Final Assessment
Other Delivery Methods	On Demand only

305: Hub Model Hierarchy Management

Hungry to know more? Anaplan Advanced Topics are deeper dives into specific areas of Anaplan. This class gives the Anaplanner the fundamental steps to automate a hierarchy load from a Hub model to a downstream model. This training is intended for Anaplanners wanting to automate loading hierarchies/lists. You should have a good understanding of modules, views, actions, and processes before taking this training.

Time Commitment	20-21 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Understand the architecture of hierarchy management from a Hub model• Utilize best practices in this process• Use the Anaplan Connect Wizard to import data from an outside source into Anaplan
Completion Requirements	Completion of the 305: Hub Model Hierarchy Management SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan Hub Model Hierarchy Management• Anaplan Hub Model Hierarchy Management Post Course Survey
Other Delivery Methods	On Demand only

306: User Access & Roles Overview

Understanding how to setup user roles and selective access is key in the model building process. Take a closer look at the controls available for this process. It provides an overview of both user roles and selective access before moving into more details around the user role feature.

Time Commitment	15-20 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Explain the importance of user roles and selective access in a model• Create a model role• Use roles to set up permissions for modules, versions, Lists and Actions• Set landing dashboards for roles• Personalize content by role• Assign a model role
Completion Requirements	Completion of the 306: User Access & Roles Overview SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan User Access & Roles Overview• Anaplan User Access & Roles Overview Post-Course Survey
Other Delivery Methods	On Demand only

307: Selective Access

This course dives deeper into selective access. Using selective access allows the model builder a greater amount of control over what individual users see and have access to.

Time Commitment	15-20 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Explain the items for which selective access can allow and deny access• Turn on selective access• Setting selective access for users• Assigning selective access by user• Explain how selective access affects dashboard views and interactions• Utilize selective access with dependent dropdowns• Assign different level of read and write access
Completion Requirements	Completion of the 307: Selective Access Overview SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan Selective Access• Anaplan Selective Access Post-Course Survey
Other Delivery Methods	On Demand only

308: Automating User Access

Users can be automatically added to a model through an Import process. At the same time you can also set their Model Role and Selective Access information automatically. This training covers what you need to know to perform this process.

Time Commitment	11 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Automatically add users to the system through an import• Set users model role and any selective access designations• Setup a permission module• Utilize saved views to optimize the import process• Create import actions• Automate permission updates
Completion Requirements	Completion of the 308: Automating User Access Overview SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan Automating User Access• Anaplan Automating User Access Post-Course Survey
Other Delivery Methods	On Demand only

309: Reducing Model Size – Introduction to Sparsity

Unnecessary model size has a large impact on your Anaplan environment from using valuable space to slowing down key processes. Sparsity is one of the biggest causes of inflated models. Understanding what sparsity is and how it impacts a model is the first step in knowing how to reduce it.

Time Commitment	5-10 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Define concepts such as storage capacity and workspace memory• Differentiate between model, module and line item sizes• Contrast the differences between spaces cells and dense cells• Explain how sparsity is measured in a model
Completion Requirements	Completion of the 309: Reducing Model Size – Introduction to Sparsity SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan Reducing Model Size – Introduction to Sparsity• Anaplan Reducing Model Size – Introduction to Sparsity Post-Course Survey
Other Delivery Methods	On Demand only

310: Eliminating Sparsity

Sparse cells within an Anaplan model are cells that do not contain and are not expected to contain data. The platform still needs to allocate memory space to these cells even though they are not used. The trick is being able to identify and combat these cells in existing models as well as preventing them when building new.

Time Commitment	10-20 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Identify sparse cells in existing models• Think critically when building new models to keep sparsity at a minimum• Utilize line item components such as Applies to, Formulas, Summary, Versions, and Time to reduce sparsity• Analyze which dimensions are necessary in a module and which could be removed• Write formulas which allow you to eliminate other line items or dimensions• Understand how numbered or subset lists can be used to reduce sparsity
Completion Requirements	Completion of the 310: Eliminating Sparsity SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan Eliminating Sparsity• Anaplan Eliminating Sparsity Post-Course Survey
Other Delivery Methods	On Demand only

311: Effective Dating

Use of effective dating addresses the basic challenge of recording the dates when a change is made in the system. To use an HR example, recording when an employee transfers from one department to another. Other examples include contract renewals, territory assignments, and compensation plans. Essentially, any change that you want to be able to document and record a history of when that change happened, requires effective dating.

Time Commitment	17-20 minutes
Cost	None
Audience	Customers, Partners, & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you will: <ul style="list-style-type: none">• Explain when is an appropriate time to use effective dating techniques and why they are important• Utilize start, end, and transfer dates to create effective dating formulas• Create an Action to sync employee information• Have the system properly attribute resources to the correct hierarchy, such as the employee's salary to the correct department• Write formulas to calculate headcount
Completion Requirements	Completion of the 311: Effective Dating SCORM package
Course Outline	<ul style="list-style-type: none">• Anaplan Effective Dating• Anaplan Effective Dating Post-Course Survey
Other Delivery Methods	On Demand only

340: Agile Implementation Methodology for Customers & Partners

This training provides the background you need to fully understand the Agile process – what it is; how it works; who’s involved; and why it works. The first part of the training is about the type of Agile Methodology used by Anaplan, the Scrum version of Agile. The second part of the training is all about Anaplan’s specific processes using Scrum as the framework for how an implementation is completed.

Time Commitment	45-60 minutes; two (2) week enrollment period
Cost	None
Audience	Customers, Partners & Anaplan Employees
Prerequisite(s)	101: Foundations
To Enroll	Enroll yourself via the Learning Center after completing prerequisite(s)
Learning Objectives	By the end of this class, you’ll be able to... <ul style="list-style-type: none">• Provide an overview of Agile• Explain the advantages of Agile vs. waterfall• Outline how Anaplan implementations use agile• Explain the importance of the different Agile components• Define the roles and expectations in the Agile process as it applies to Anaplan
Completion Requirements	Completion of the 340: Agile Implementation Methodology for Customers and Partners SCORM package
Course Outline	340: Agile Implementation Methodology for Customers and Partners SCORM
Other Delivery Methods	On Demand only

401: Solution Architect

This course is designed for partners and Anaplan consultants who are currently doing project work as certified Model Builders and rare ready to make the next step up to a Certified Solution Architect. Experienced model builders will obtain the skills needed to move beyond creating well performing, functional Anaplan models to designing best-in-class Anaplan solutions.

Time Commitment	Three (3) days of onsite classroom learning, with an additional 20-40 hours of a certification project to be completed within three months of the end of class.
Cost	None
Audience	Partners & Anaplan Employees
Prerequisite(s)	101: Foundations 102: Introduction to Model Building 201: Intermediate Model Building 340: Agile Implementation Methodology for Customers and Partners Minimum of three months of active Anaplan project experience
To Enroll	Enrollment by invitation only; course materials in Learning Center
Learning Objectives	By the end of this class, you'll be able to... <ul style="list-style-type: none"> • Scope an Anaplan project • Translate business requirements into user stories • Explain the Anaplan Agile Methodology • Design an Anaplan solution adhering to Architecture best practices • Build a production ready solution from the model design that meets functional requirements, has an intuitive end user experience and optimizes model maintenance for a system administrator • Demonstrate use of Project Planning App
Completion Requirements	Successful completion of an instructor-evaluated final project.
Course Outline	<p>Day One</p> <ul style="list-style-type: none"> • Review main use cases • Scope an Anaplan project • Discuss key deliverables • Prepare for and conduct a project kick off meeting • Review Agile methodology and project planning app • Gather project requirements <p>Day Two</p> <ul style="list-style-type: none"> • Review Customer Success package • Apply collated User Stores to appropriate sprints • Build out Revenue and Assigned Cost areas of model • Prepare demo on build to date <p>Day Three</p> <ul style="list-style-type: none"> • Discuss data integration • Review dashboards and dashboard requirements • Understand allocation of costs • Demo model build to date • Understand the accreditation process
Other Delivery Methods	Classroom only

Meet Anaplan

About Anaplan

Anaplan delivers cloud-based, in-memory business planning and execution for sales, operations, and finance. We built our platform from the ground up to empower companies to plan, collaborate and act—in real-time. Unlike legacy planning tools, Anaplan delivers what you've always needed in a planning solution—powerful modeling, adaptability on the fly, engaged users, and real-time performance no matter the data volume and complexity.

Anaplan enables business users across your organization to turn the complexity of your business operations into powerful, easy-to-use models. Stay ahead of critical business events, rapidly model potential impacts and course correct on the fly. With Anaplan's cloud-based platform, you can continuously align your people, plans and spend to your market opportunities.

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