Anaplan Budget Turn Around (BTA)
User Manual

If you are having any problems with Anaplan access (for example, not seeing the data you would expect to see or seeing data you think you should not be seeing, adding/removing users, users changing assignments), please contact Decision Support & Analysis at decisionsupport@udel.edu. Any BTA or budget specific questions or comments can be directed to your budget office analyst or to wf-budgetofficebta@udel.edu

Navigation Pane
To see a “hyperlinked” Table of Contents for this document, open the Navigation Pane in Word by pressing Ctrl+F and select “Headings”
Logging into Anaplan

1. Access the Anaplan application using any browser: https://us1a.app.anaplan.com/home

2. Click on the “Log in with Single Sign-on (SSO)” link and sign-in using the Central Authentication Service (CAS).

3. Once logged in, you will see your ‘Home’ screen. You should see a blue title bar with a “Welcome, [Your Name]” displayed, as well as a list of available Apps and Pages.

4. Click the dropdown arrow for Apps then click on “Budget Turn Around BTA”. You should then see a list of categories and pages within the App.

Anaplan User Interface

The Anaplan UI (user interface) is primarily made of Apps, Pages, and Cards.
1. **Apps** – Collection of related Pages. An App can have many pages. You will see pages listed according to your permission settings.

2. **Pages** – Designed for BTA activities. A page is made up of many cards. Pages may also be called dashboards.

3. **Cards** – There are usually many cards on a page. A card is designed to display data in the best way for you to carry out your work.

**Tip:** Once you make a BTA page selection, a quick way to navigate to the various categories and pages within the categories is by selecting the down arrow at the top of the page (see below).
Anaplan Roles/Permissions

Every user in Anaplan is assigned a user role (or user permission type). See the below. Any questions about your role should be directed to decisionsupport@udel.edu
Where do I start?

A good place to start reviewing your area’s budgets are by running reports listed under the “8. Reporting” category for your College/Unit or Department. Many of the reports that have been created in Anaplan are like the reports that were previously available in Axiom.
3. Budgeting

The pages under “3. Budgeting” are where the non-compensation related expenses are input. There is a separate section “5. Other Labor” for other labor like S-Contracts.
3.1 Calculation Engine Overview

3.1 is a dashboard to review budgeting data. No input is done here. 3.1 gives you a view of all the historic budget & actuals data for the selected College/Unit or Department. It might be useful to have this tab open, and then work on a separate tab (i.e. 3.4) and refresh 3.1 as updates are made. Different time periods can be selected on the time filter. To streamline the viewing of the data, the “Suppress Zeros” checkbox removes lines that equal zero (based on the selections under the Time Filter).

3.2 Calculation Engine Drivers

3.2 lists the driver methods that the budget office initially set up for the Other Labor purpose & account combinations. The user can override these selections, if applicable.
In this section you can set the Budgeting line-item drivers at various levels (Line Item, Sub-Category, or GL Level.) The driver methods for each different account are what will ultimately drive the development of your budget. This is done at a Purpose - Account concatenation level. These concatenations will be prepopulated by an account level driver selection made by the budget office. If you want to review the driver methods selected for your unit, you may do so at the bottom of the grid.

Note that you can sync the lower levels of the account hierarchy by clicking on a row header. This will filter the grids below to only show the children of the selected item.

3.3 Manual Growth Rate Review

If you input a manual growth rate for any budgeting items, you should be able to see those listed here.

In this dashboard you can set the growth rates for each account which will ultimately drive the development of your budget for those accounts for which you selected the '％ Growth' driver. Setting a growth rate at a parent level will automatically populate all children with that rate, you
can then override at a child level for any exceptions. This allows you to make as little inputs as possible, and not have to make the inputs GL account by GL account.

If the '% Growth Override' column in the grid below is highlighted orange, this means you have entered a % but not checked the override column next to it meaning that value will not be applied. If the '% Final Growth' column is highlighted yellow, that means that a child of that account has been overridden. In this case there is no issue, it is just an indicator.

Note that you can sync the lower levels of the account hierarchy by clicking on a row header. This will filter the grids below to only show the children of the selected item.

The '% Final Growth' column in the bottom grid is what the model with ultimately use to calculate the budget you are developing for the upcoming fiscal year.

### 3.4 Manual Dollar Input

The 3.4 dashboard is the primary area for manually inputting the non-compensation expenses. The initial value (or baseline) is initially set by the Budget Office. To change the amount, you need to click on the checkbox in the “Override?” column, then type in the amount in the “Manual $ Input” column. **Both steps must be done in order to update the amount.**

### 3.5 Multiple Line Input

This dashboard is where you would see the usage of “multiple line item” drivers (i.e. if you wanted to do a growth rate plus some fixed amount). Most departments will probably not use 3.5.
3.6 Create New Purpose – Account Combinations

This area is where you can create new purpose code – account combinations. This would be where you want to budget on a PeopleSoft account in a particular purpose code, but that purpose code/account combination is not visible.

Input the needed fields for your new combination in the grid. Once you are finished, check the 'Create?' checkbox. The error indicator to the right of the grid will indicate if there are any issues with your inputs.

Once all errors have been rectified, click the “Create New Purpose – Account Combo” button to create your new combination. Note: You will need to refresh the page where you want to view the new purpose-account combo.
4. Position Planning
The pages under Section 4 are where the position data is updated, including separate selections for filling vacancies and creating new positions.

4.1 Current Position Planning

4.1 is where changes are made to existing positions. This position data is downloaded from HR at the beginning of the BTA process. Things that can be changed here include:

1) FTE
2) Salary
3) Merit
4) Other Increases
5) Admin Supplements and 1/9th
6) Distributions (purpose code/account/class) for Base Salary, Admin and 1/9th
7) Specific dates for salary changes

Note: These changes are only for BTA budget planning. The changes will not flow back to HR (i.e. LAM changes).

Under the filter selection, select the College/Unit you want to work on. You can sort by the various columns like Position ID, Position type or Salary.

Tip: To delete a date from a date cell, you can press “Delete” on your keyboard. You might need to wait a few seconds before it takes effect.

Tip: If you want to change a distribution, but that distribution only has one line (i.e. equals 100%), you will first have to go to 4.1a to add a new distribution. Once you do that, you can
navigate back to 4.1 (refresh the page) and you will see the new distribution for that position and will be able to click the box(es) for “Override Distribution?” and enter the new distribution percentage(s).

Tip: For faculty salaries or for academic positions where the merit increase is typically 9/1, Anaplan assumes that any distribution changes will also take effect 9/1. If the distribution change needs to be in effect on 7/1, you need to put 7/1 in the “Distribution Override Effective Date”.

### 4.1a Add a New Distribution

If you want to add a new distribution for a position, whether it is for base salary, admin supplement or a 1/9th, you will enter it under 4.1a. Enter the data as shown in the fields below. Make sure you read the pink “Error Message” box at the right for any potential input errors. Select the checkbox for “Create Distribution” and click on the “Create a New Distribution” button. When you navigate back to 4.1, you should be able to see what you just created (after refreshing).
4.2 Vacancy Planning

4.2 will show any vacant positions that were imported into Anaplan from HR for the selected College/Unit or Department. If you want to include them for budgeting, click on the checkbox for “Include?” next to each position. Scroll further down to select the “Override Salary?” checkbox for each position and input the salary dollars in the “Salary Override Amount” field (make sure to do both actions). Lastly, update the distribution percentages. If a new distribution is necessary, that must be done in 4.2a.

Continuing down the page are separate sections where you can override (i.e. update) the Base, Admin or 1/9th salary (if applicable).

4.2a Add New Vacancy Distribution

This works similar to 4.1a but it is used when a vacant position being included for budgeting needs a different purpose code / account / class.
4.3 New Position Planning

4.3 is where an entirely new position can be created.

Step 1 is to fill out the details for each position being created. Make sure to check the box for “Create Position?”.

Step 2: Click on the “Create New Positions” button

Step 3: Insert salary, start date, and any comments

Step 4: Input the distribution details
To summarize

- **Step1** - User enters the data for a new position
- **Step2** - creates the new position by clicking the blue button
- **Step3** – User fills in salary and start date
- **Step4** – User provides salary distribution information
- **Step5** - creates the salary distribution
- **Step6** - allows user to view how the position is being allocated

Once created

- Zeroing out the salary or the start date in Step3 removes the budget impact of the new position
- The funding distribution can be edited/deleted by the user in 4.3a
4.3a Remove New Positions and Distributions

4.3a is where you can delete any new positions or distributions that have been created.

4.4 CBO Export – Current Position Planning

This dashboard is where the position planning data can be exported & imported via an Excel template. This is useful if you have applicable data in a “shadow system” or other spreadsheet and would find it easier to have the budget office import the data into Anaplan instead of manually entering it.

Note: This section carries over the filter settings from 4.1

1. Click the applicable “Export” button to export the selected data as a CSV template for additional data entry or updates.
2. Once changes have been made in the CSV template, send it your budget office contact (or use the email link on the page). The Budget Office will import your file into Anaplan and will inform you when the data is ready to view in Anaplan.

Employee Level Inputs:

- Enter in: End Date, Rank/Retention Effective Dates, Distribution Override Effective Dates, FTE Override Dates, Override FTE? (FALSE to TRUE if changing) and New FTE
- Enter in dates as MM/DD/YYYY to see the overrides effective as of the entered date

Salary Override for Base:

- Change "Salary Override?" from FALSE to TRUE and enter "New Salary"
- Change "Merit Increase Override?" from FALSE to TRUE and enter "New Merit Increase"
- Enter $ increase in Rank/Retention OR % increase in Rank/Retention

Salary Override for Admin:

- If the Employee has Admin Distributions then when exporting change "Salary Override?" from FALSE to TRUE and enter "New Salary"

Salary Override for 1/9th:

- If the Employee has 1/9th Distributions then when exporting change "Salary Override?" from FALSE to TRUE and enter "Override Amount"

Labor Distribution Overrides:

- If applicable, change "Override Distribution?" from FALSE to TRUE and then enter "Distribution Override" as % (Note: Distributions must add to 100%)

4.5 CBO Vacancy Planning Export

4.5 can be used in the rare case when vacancy data needs to be exported to Excel to be worked on and then imported back into Anaplan. Your budget analyst can help you with the import function.
4.6 Review All Shared Position

4.6 is a report that can be used to view all your shared positions.
5. Other Labor
The Other labor section is where Other labor like overtime and misc wage is input.

5.1 Other Labor Calculation Engine

5.1 is a page to view the data, there are no actions to be done here. 5.1 gives you a view of all the historic other labor activity for the selected College/Unit or Department. It might be useful to have this tab open, and then work on inputting other labor on a separate tab (i.e. 5.4).
5.2 Other Labor Driver Review and Override

5.2 lists the driver methods that the budget office initially set up for the Other Labor purpose & account combinations. The user can override these selections if applicable.

In this section you can set the other labor line-item drivers at various levels (Line Item, Sub-Category, or GL Level)

% Growth – uses a simple percent growth rate
$ Input – defaults to baseline set by the Budget Office (PY budget or actuals), but allows the user to override.
Trend – takes a 3 year average
No change – take baseline budget, but users can’t override the amounts.
Multiple Line Input – allows for multiple driver manipulations
No Value – makes it equal to zero
5.3 Manual Growth Rate Summary

If you put a manual growth rate on any of your Other Labor, you should be able to see those listed here.

5.4 Other Labor Manual Inputs

This is where you can manually input the other labor. The initial baseline is set by the Budget Office. If you wish to update that amount, you need to click on the checkbox in the “Override?” column, then type in the amount in the “Manual $ Input” column. Both items need to be done to complete the update. The number in the “$ Input Final” is what will appear in the proposed budget.
5.5 Other Labor by Line Input

This is where in the case of multiple line item drivers (i.e. if you wanted to do a growth rate plus some fixed amount). **Most departments will probably not use this selection.**
6. Submissions

The submissions area is where the workflow process occurs and is tracked. Once the budgeting and labor areas are completed, they need to be submitted for approval.

6.1 Budgeting Submissions

Users that have been assigned the “CBO Reviewer + Prepare” role should have the ability to make additions/changes to any DeptID within their assignment as long as that DeptID has not been submitted into the workflow process. If the DeptID has been submitted, and the next approval level (CBO, Unit lead, or Dean/VP) rejects it, the original preparer has to resubmit it. The next approval level (CBO, Unit lead, or Dean/VP) cannot resubmit it. If a DeptID is in some workflow status and the original preparer is unavailable, the Budget Office has the ability to temporarily unlock a DeptID and either make the necessary changes or unlock and have the College/Unit make the necessary changes. Then the Budget Office would have to “relock” (remove the unlock) from that DeptID.

Once the budgeting work is complete, the user can navigate to 6.1 and click on the applicable DeptID under the “Submit?” column and then click the “Submit Budgeting” button. This “sends” the budgeting work for that DeptID to the next approval level (CBO, Unit lead or Dean/VP)
Tip: if you have numerous DeptID’s that you want to process together, you can click the checkbox on the top one and then right click to bring up the “Copy Down” menu selection. Click that on that and your checkmark will be copied down to the last item.
6.2 Budgeting CBO Approvals
Once the DeptID budget is submitted via 6.1, the same or another user can navigate to 6.2 and click on the applicable DeptID under the “Submit?” column and then click the “Submit Labor Budget” button. This “sends” the labor work for that DeptID to the next approval level (CBO, unit lead or Dean/VP).

Tip: if you have numerous DeptID’s that you want to process together, you can click the checkbox on the top one and then right click to bring up the “Copy Down” menu selection. Click that on that and your checkmark will be copied down to the last item.
6.3 Dean / VP CBO Approvals

This area tells you whether the work has been submitted, approved, rejected or ultimately approved at the CBO or Unit Lead level. If an approver wants to approve a particular DeptID, they can click on “CBO Approve?” and then click on “Approve Budgeting”. If an approver wants to reject a particular DeptID, they would click on “CBO Reject?” and then click on “Reject Budgeting”.

If you would just like to see what is rejected, click on the “Rejected Budget Approvals?” checkbox at the upper right.

Tip: if you have numerous DeptID’s that you want to process together, you can click the checkbox on the top one and then right click to bring up the “Copy Down” menu selection. Click that on that and your checkmark will be copied down to the last item.
6.4 Final Approvals for Budgeting

6.4 is where the Dean or VP (or their designate) would go to approve the budget and route it to the Budget Office.

This area tells you whether the budget has been submitted, approved, rejected or ultimately approved. If an approver wants to approve a particular DeptID, they can click on “Dean/VP Approve Budgeting?” and then click on “Approve Budgeting”. If an approver wants to reject a particular DeptID, they would click on “Reject?” and then click on “Reject Budgeting”.

If you would just like to see what is rejected, click on the “Rejected Budget Approvals?” checkbox at the upper right.

Tip: if you have numerous DeptID’s that you want to process together, you can click the checkbox on the top one and then right click to bring up the “Copy Down” menu selection. Click that on that and your checkmark will be copied down to the last item.
6.5 Submission Progress
This report tracks the overall workflow progress of each DeptID. The goal is to get all plan files approved and submitted to the Budget Office. This is an informational dashboard and not where the DeptID’s are approved or rejected.
8. Reporting

8.1 Labor Distribution

8.1 shows the position detail for all positions that are currently listed under the primary (or home) selection for the College/Unit or Department (selected via the User Filter). Data can only be viewed here, not changed.

On the right side of the screen there are various filter selections, including College/Unit.

Once you select a College/Unit, you also can select individual Departments to view within that College/Unit by using the checkboxes under “Department to View”.

<table>
<thead>
<tr>
<th>Position Description</th>
<th>Position ID</th>
<th>Employee ID</th>
<th>Employee Name</th>
<th>Primary Department</th>
<th>Pay Department</th>
<th>Salary Account</th>
<th>Fringe Benefit Account</th>
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User Filter

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<tr>
<th>College / Unit</th>
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<tr>
<td>STUDENT LIFE</td>
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Purpose

<table>
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<tr>
<th>Find...</th>
<th>Find...</th>
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</thead>
</table>
Tip: If you have previously selected a department or group of departments, and you wish to quickly clear out those prior selections, you can click on the “Clear Department to View” button to deselect all the selected departments.

Note: The summation of the 8.1 position data will not necessarily equal the salary charge to the specified College/Unit or Department due to positions that are Department Owned / Paid Elsewhere (charges flowing out to another College/Unit or Department) or are Shared (charges coming in from another College/Unit or Department). A “truer” salary impact can be found on the report 8.6 or 8.6b.

8.2 Labor Roster
The Labor Roster page shows all the positions within the primary College/Unit or Department selected in the filters. This page shows position data (similar to 8.1), but with a few other fields. Data can only be viewed here, not changed.
On the right side of the screen there are various filter selections, including College/Unit. Once you select a College/Unit, you also can select individual Departments to view within that College/Unit by using the checkboxes under “Department to View”.

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Tip: If you have previously selected a department or group of departments, and you wish to quickly clear out those prior selections, you can click on the “Clear Department to View” button to deselect all the selected departments.

Note: The summation of the 8.2 position data will not necessarily equal the salary charge to the specified College/Unit or Department due to positions that are Department Owned / Paid Elsewhere (charges flowing out to another College/Unit or Department) or are Shared (charges coming in from another College/Unit or Department). A “truer” salary impact can be found on the report 8.6 or 8.6b

8.3 Statement of Activities (by Fund Type)
This report presents the standard AFR reporting view for a particular time period with Fund Types across the top and financial line items going down the page. The College/Unit/Sub-Unit is selected under “Unit to View” filter at the right. You may also select one or more individual departments under “Department to View”. The year selection toggle (shows “FY25” below) can be used to select the budget year that is being worked on, the previous year’s budget, or previous years of actual data. At the top of the report, there is a line Source that will say BUDGET, CURRENT BUDGET, or ACTUAL, depending on what fiscal year you selected in the year selection toggle.
If you are comfortable with this format, it might be helpful to keep this report open on a separate tab as you formulate the budget. As you make changes, you can then refresh this report to see your budget in the AFR format.

8.4 Statement of Activities Trend
This page is similar to 8.3 but is for one fund type category over time. Select a single fund type category (at the top). The years presented (from right-to-left) are the Budget (budget currently being worked on), the Current Budget (the last finalized budget), and the rest of the columns are actuals. College/Unit and Sub-Unit can be selected with the filters to the right. You may select one or more individual departments to view under “Department to View”.

8.5 BTA Dashboard
The BTA Dashboard is similar to 8.4, but with a slightly different column layout. The report shows YTD Actuals as of when the data was pulled into BTA and the base budget before any adjustments.
8.6 Labor Distribution to Budget Tie-Out

8.6 Labor Distribution to Budget Tie-Out

8.6 Labor Distribution to Budget Tie-Out

8.6 gives you a very granular view of labor for a particular Department (DeptID). The report is laid out on multiple cards:

1) **Department Owned Positions** – The position’s home is the selected Primary Department and the charges reside in the same selected Department.
2) **Department Owned / Paid Elsewhere** – The position’s home is selected, but the charges flow to a different department. These dollars are **not included** in the selected Department budget nor are they in the grid in the upper right.

3) **Shared Positions** – The position’s home is elsewhere, but the charges flow to the selected Department.

4) **Other Labor**

The summary grid in the upper right of the report sums up 1, 3 and 4 above and should reflect the total compensation budget for the College/Unit or Department selected. It should also match the salary data on 8.3 and 8.4.

Select the “Export for Labor Tie-Out” button if you want to export the data into Excel

---

**8.6b Labor Distribution to Budget Tie-Out College/Unit Level**

1) **College/Unit Owned Positions** – These are positions are owned/planned and paid by the selected College/Unit.

2) **College/Unit Owned / Paid Elsewhere** – These positions are owned/planned by the selected College/Unit but are partially or fully paid by another College/Unit. These budget dollars are **not included** in the selected College/Unit and not included in the grid in the upper right.

8.6b is similar to 8.6, but it presents a view of labor at College or Unit level instead of at the DeptID level. The particular College/Unit can be selected in the filter.

---
3) **Shared Positions** – these are positions owned/planned by another College/Unit but are partially or fully paid by the selected College/Unit.

4) **Other Labor**

The summary grid in the upper right of the report sums up 1, 3 and 4 above and should reflect the total compensation budget for the College/Unit selected. It should also match the salary data on 8.3 and 8.4.

**8.7 Budget Tie-Out**

The Budget tie-out report has the most granular level of detail available for the proposed budget, including a comment field. To remove from view those items with zero dollars, click on the “Filter Zeros” filter at the right. To export the data into Excel, select the “Export Data to Excel” button.
General Tips & Tricks

Budget Period Selection

The Budget Period Selection is usually at the top right of every page and signifies what Budget is currently open for input. **For now, users do not need to adjust this selection.**

Refreshing the Screen

If a user is looking at a page while changes are being made to that same page by another user, the user must hit refresh to see the changes. Changes are saved automatically (no save button), but might require a screen refresh if two users are looking at the same screen at the same time.

**Places to refresh**

The user can either refresh the browser screen (browser refresh icon) or just refresh the card (card refresh icon).
In Anaplan you will usually see a list of icons in the upper right part of a section that you can use to better view/manipulate the data.

- **Search** – to search for a particular item in a list
- **Cell History** – lets you see the history of a cell
- **Pivot** – allows the user to select the row and column views (i.e. like in an Excel pivot table)
- **Filter** – to filter the data based on a condition (true, false, equal to, less than, greater than, etc)
- **Sort** – sort the column (ascending or descending)
- **Show / Hide**
- **Export** – to export the screen data (i.e. to Excel)
- **Copy Across** – to copy across columns
- **Copy Down** – to copy down rows
- **Maximize/Minimize Section Size**
- **Ellipsis (three dots)** – Format Grid / Row Height or Font Size
Maximize/Minimize Section Size

Some sections can be maximized by clicking the above icon which should appear in the top right of the section you are on. Note: the secondary refresh icon will disappear when this is done. To minimize a section, click on the minimize icon below (which should be at the top right of the screen).

Copy / Paste Data
To copy data down a column, go to the top cell in a column, Copy, then go to bottom, hold shift and click the last item, then Paste.

You can also use the “Copy Across” or “Copy Down” icons at the upper right to copy data across or down.

Pivot
The user can view different layouts of rows and columns via the Pivot icon.
**Pivot Reset**
If you have done a pivot, you will see a blue underline under the icon. Click on the icon and select “Reset Pivot” at the bottom.
Select All Items / Deselect All Items - Shortcut
A shortcut for selecting all items in a list. Instead of clicking them one-by-one, click on the column header and press the space bar. If you press the space bar again, it will do the opposite (select or deselect).

You can delete dates by clicking on the cell once to highlight it, then “backspace” key and then clicking “enter” or “tab”.

Section 6 – approve button only approves, reject button only rejects… so it’s OK to check on a bunch of DeptID’s then click both buttons.
APPENDIX

Add Pages to Favorites

1. To favorite a page from the app contents screen, click the star icon on the far-right of the name of the page as seen above.

2. As you begin to use Anaplan and click on different pages, those pages will show up in the ‘Most Recent’ card.

3. To view the ‘Most Recent’ and ‘Favorite’ pages click the ‘>’ to the left of the category name.

Banner Tab Features and Navigation

The Banner Tab on the page has many useful features.
1. Click on the word “Apps” or use the light blue drop-down arrow to go back to the Homepage.

2. Use the dark blue drop-down arrow when on a page to select and go to a different page.

3. The initials icon (e.g., RF) can be used to view Account information or log out.

4. The ? icon can be used to go to the Help card for any Anaplan related questions.

5. The icon allows you to view your notifications (e.g., when you are mentioned in a comment, something is shared with you, or anything related to your Anaplan account).

6. The icon allows you to complete a system-wide search for pages, apps, and models.

**Page Level Features**

After you click on the page from the Apps list view, a page view will open. There are many useful features that you can access from here.

1. **Refresh** – This can always be found next to the name of the current page. You can use this feature to refresh the page as necessary.

2. **Share** – This can be used to share the page. Once this is clicked, you can copy the URL link, or you can share the page via email with an option to write a message.

3. **Favorite** – You can favorite any page using this icon, to make it more easily accessible from the page list view.

4. **Page Selector** – Many pages have dropdown lists with differing options that can be used to filter data seen on a page to a particular dimension (e.g., time, department, fund type, etc.).
5. **Reset** – This option allows you to reset your page selector options so the page reverts to not being synced to any selected data.

6. **Comment** – This comment feature, further explained in another section, can be accessed from the top right of a page as well.

7. **Page Options** – Click on the ellipsis (…) to find more options, such as ‘Export as PDF,’ to view the whole page as a PDF. Depending on your permission level or role in Anaplan, you may also see the option to view the source model for the page.
Maximize a Card View

The ability to maximize a card is a useful feature to magnify the view of the card and its details.

1. Hover over the card that you wish to see an enlarged view of, and the icon tray appears.

2. Click the icon on any card, and another window with an enlarged view of your card will appear on your screen.

3. To minimize the card and revert it back to its original size, click on the icon.

Add Input to Editable Cells in the Grid Card

Some grid cards have cells that are editable, depending on access provided to your role in Anaplan. In many cases, required fields show red and optional fields show yellow.

1. To add or edit information in a cell, double-click on it, make your edits, then push 'Enter'.

   The new value entered will show purple.

2. Some editable cells contain a dropdown menu. Click the dropdown arrow to choose from the pre-populated options. You can also type into these dropdowns to search for the desired item in the list.

3. You can undo the input into the cell only once using keyboard shortcut ‘CTRL+Z’. Anaplan cells are functional like Excel cells; you can also click on the cell, then type the ‘Delete’ or ‘Backspace’ key on your keyboard.

Note: If you make any changes to a cell and navigate to another page, the new value will be saved.
Troubleshooting Tip:

If you encounter a red diamond ‘♦’ on the cell, it indicates that data has changed but has not been processed by the model. This could be because your internet connection was disrupted, or the model was processing other changes at the same moment. Although rare, if this occurs, simply refresh the page, and edit the cell again.
Show History on a Cell in the Grid Card

‘Show history’ is a useful feature that can be used to show the last changes made to that cell within the last 24 hours, last 7 days or last 30 days. This feature is only available for an editable cell on a grid card.

If you make any changes to an editable cell and navigate to a different page, these new values will be saved. As you work in Anaplan navigating from page to page, the ‘Show history’ feature will come in handy to see any changes you or others may have made.

1. Right-click on the cell in which you would like to see history.
2. Click on “Show history”.
3. A dialog box opens, prompting you to choose the timeframe for history of changes.
4. Once a selection has been made, the “Cell history” pop-up window will display.
Drill Down on a Cell in the Grid Card

Drill down is a feature available on cells in a grid card if they are formula based (not imputable). Based on the permissions in Anaplan, you can see the drill down option.

1. Right-click on the cell in which you would like to view the drill down.
2. Click “Drill down.”

3. A separate dialog box will open to the far right of the screen. Different drill down details are available based on the data in the cell chosen.
4. (Optional) You can continue to drill down further by right clicking another cell from the Drill down panel on the right. Your pathway will be captured for easy navigation.
5. To exit out of the ‘Drill down’ dialog box, click the ‘X’.
Add Comments to a Card

The ability to add comments to a card is a useful feature to drive communication and collaboration.

1. Hover over the card where you would like to add a comment.
2. Click the comment icon, as shown above.

3. A dialog box opens to the right of the screen, with the name of the card at the top.
4. Type your comment in the text box, then press “Enter” on your keyboard or click “Post”.
   - **Note:** You can tag another Anaplan user in the comment using ‘@’ followed by their email, which will trigger a notification to that user.
5. To read comments on a card, hover your cursor over it and click on the comment icon. All comments posted for that card will be visible as a thread to the right of the screen.
Export Tables and Charts

Grid and/or chart cards can be exported into various image file types (PNG, JPEG, or SVG) and non-image file types (.xlsx, .xls, .csv, .txt and .pdf formats).

- **Note:** Only grid cards can be exported as non-image file types: .csv, .txt, .xls, .xlsx, .pdf
- **Note:** Only chart cards can be exported as PNG, JPEG, or SVG

Export Grid Cards

1. Hover over the card, then click on the ellipsis (...) icon as shown above.
2. Hover over “Exports” then click “Export this view.”

   ![Export View](image)

3. The *Export View* pop-up window opens.
4. You can choose from various file formats for your export. You can also choose whether to include or exclude empty rows.
5. Once appropriate selections have been made, click the blue “Export” button.
6. The export file downloads to your hard drive.
Export Chart Cards

1. Hover over the card and click on the (...) ellipsis icon as shown below.
2. Hover over “Exports” to see a list of available image export options.

Search in a Card

In addition to the global search mentioned in the Banner Tab Navigation section above, you can complete a keyword search at a card level. This feature is helpful when you need to access data quickly from a card with many line items or columns.

1. Hover over the card and click on the magnifying glass icon.
2. Type the keywords you are searching for and click “Enter”.


Filter a Row or Column in a Card

You can use Anaplan’s filtering functionality on any grid card. Some cards contain columns with specific filtering functionality. As an example, the steps below outline the process to filter to Departments Submitted for Approval? - “Submitted?” on 4.1

1. To apply the filter, click the “Submitted?” column, then click on the filter icon in the top right corner of the grid, OR you can click on the filter icon first then select the “Submitted?” column.
2. Once the filter has been selected, a grid on the right will appear and will allow you to set the filter criteria. In this example, select the “Is true” option and click “Apply” in the bottom right corner.

Show/Hide a Row or Column in a Card

If there are specific columns, rows, or “dimensions” (the header row, column, and/or page selector within a grid that define the context for the data in the cells) that you would like to either hide or show, click on the “show / hide” button next to the “filter” button.

1. Click on the icon in the top right corner of the grid.
2. Select what you would like to see or hide from the dropdown.
   - Note: Selecting “Line Items” will let you select the data points you want to see. In the example above, the “line items” are “Position Description”, “Earnings Code”, etc.
   - Note: Selecting “L2 EmpID-Purpose-Account-Class” will allow you to focus only on employees and their distributions you care to see and will hide all others. You can use the “Find” search box to find an item(s) you want to see. Once you’ve made your selection, click “Apply” in the bottom right corner.
   - Note: Selecting “Show all rows” or “Show all columns” can be used to undo your current selections and give you full visibility to everything that was previously visible within the grid.
3. In the Levels section, you can choose to show or hide the roll-up of your selection.
   - Note: For the “L2 EmpID-Purpose-Account-Class” selection, unchecking the “L2 EmpID-Purpose-Account-Class” box will remove the employee distributions from the
grid, and you will only see the “L1 EmplID” summary rows (i.e., you will no longer see individual distributions and will only see the L1 Employees lines that the distributions roll up to.) Inversely, if you choose to only show the “L2 EmplID-Purpose-Account-Class”, it will remove the L1 Employee summary rows in the grid.

➢ **Note:** For the “Line Items” selection, unchecking the “Line Item (Summaries)” box will remove the total/summary rows (typically found at the bottom of the grid). Inversely, unchecking the “Line Item (Details)” box will leave only the total/summary rows and remove all the individual rows.

4. Click the “Apply” button at the bottom of the page to apply your changes.

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Step 1 – select a College/Unit

Step 2 – look under the “Department Details” tab to see the approval status of all DeptID’s and whether Labor and Budgeting have both been approved.

Step 3 – if all Departments have been approved, add checkmarks to both “Finalize Budgeting” and “Finalize Labor”

Step 4 – Click on the “Finalize Labor” and “Finalize Budgeting” buttons to lock all the DeptID’s down.