Anaplan XL Reporting

Quickstart guide



Contents

Quickstart guide	0
Background	
Installation	
Applying a license key	5
Connecting to your data	5
Sample data connection	6
Building a report	
Working with grids	
Grid components	9
Basic navigation	11
Formatting grids	15
User calculations	15
Slicers	
Formula reporting	
Formula versus grid based reporting: key differences	
Creating formula reports	
Charting and data visualization	
Dynamic charts (small multiples)	24
Standard Excel charts	
In-cell charts	
Treemaps	27
Mapping	
Viewports	27
Appendix 1 – Corporate deployment	

Background

Anaplan XL Reporting helps business users in all aspects of reporting and analytics. It connects Excel to Anaplan and other corporate data sources, which avoids the issues associated with Excel as a data store, while extending the Excel flexibility business users love. Anaplan XL Reporting also addresses many of the common pain points users find with Excel pivot tables, providing a richer and a more productive reporting experience.

A key aspect of Anaplan XL Reporting is that the data itself is not held in Excel but in a central database. Anaplan XL Reporting connects to a wide range of sources including Anaplan, Microsoft Analysis Services (Tabular, Multidimensional, and Azure), Power BI, SAP HANA, IBM TM1, Oracle Essbase, Atoti and Kyvos. Anaplan XL Reporting can also connect directly to relational databases.

Reports and dashboards developed in Excel can easily be shared with portal and mobile users through Anaplan XL Reporting Web. Web published reports remain data-connected and are fully interactive, secured, and governed.

Installation

Once you have downloaded the installer, you will need to install Anaplan XL Reporting on your device to start using it. Anaplan XL Reporting requires Microsoft Windows and Microsoft Excel. Please ensure that Microsoft Excel is not open before you start the installation process.

To centrally deploy the product to all users, please see Appendix 1 Corporate Deployment.

Firstly, locate the Anaplan XL Reporting installer file in your downloads and double-click on it.



To install Anaplan XL Reporting, double-click on the application to launch the installer.

The Anaplan XL Reporting Setup will open. Click install to get started, and you will be prompted by windows to allow the installer to run. Click "Yes" and then confirm yes on the next screen when prompted "Do you want to allow this app to make changes to your device?".



Click next through on each of the subsequent screens to agree to the license agreement, choose your language, and specify the installation folder, and then launch the installation.

🔁 Anaplan XL Reporting Setup 🚽 🗆 🗙	Anaplan XL Reporting Setup
End-User License Agreement Please read the following license agreement carefully	Destination Folder Click Next to install to the default folder or click Change to choose another.
END-USER LICENSE AGREEMENT FOR Anaplan XL Reporting <u>IMPORTANT-READ CAREFULLY:</u> This End-User License Agreement is a legal agreement between you (either an individual or a single entity) and Anaplan Inc (Anaplan) for the software product identified I accept the terms in the License Agreement	Install Anaplan XL Reporting to: C:\Program Files (x86)\Anaplan\Anaplan XL Reporting\
Print Back Next Cancel	Back Next Cancel
📮 Anaplan XL Reporting Setup - 🗆 🗙	🛃 Anaplan XL Reporting Setup 🦳 — 🗆 🗙
Default Language Configuration Click Next to proceed with the installation.	Ready to install Anaplan XL Reporting
Select the default Anaplan XL Reporting language	Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.
Back Next Cancel	Back Install Cancel



The software is now installed. If you now open Excel, you will see Anaplan XL as a new tab on the ribbon.



Applying a license key

The evaluation version of the product is fully functional and includes a 14-day evaluation license, which allows you to connect to your own data.

Once the product has been installed an individual user can apply a full license key supplied by Anaplan following the steps below:

- 1) Copy the provided license key file to 'my documents'.
- 2) Open Excel, use the 'apply license' button in the Anaplan XL Extras Licensing form to browse to and select the license file.

Connecting to your data

The evaluation version is fully functional and includes a 14-day evaluation license, which allows you to connect to your own data.

To connect to your own data, go to the connections dialog in the Anaplan XL ribbon.



In the new menu, navigate to the "New connection" tab.

There are some differences depending on the connection type, but the basic steps are detailed below.

Choose your connection type from the menu on the left, type your server address and press Connect. You may then eed to authenticate to validate your access to the data. You can then choose from the available models and modules what you want to connect to, and press "SAVE" to add the connection.

A Manage Connections		– 🗆 X				
	Active Connections Recent Connections New Connection					
Connection Builder		<u>ସ</u>				
Connections	Y	Connect				
	Q Models:	Q				
. Anonion	> Anaplan Australia and New Zealand					
Anapian	V Fluence Team Demo					
Amazon Redshift	Fluence Team Demo					
Analysis Services	Adw Finance					
Analysis Services Azure	e 📕 first					
Analysis Services Cube	Level 1 Model Building 2.0 (New UX)					
AnaplanXL sample data	a Planning, Budgeting and Forecasting for Banking					
A Atoti	Planning, Budgeting and Forecasting v2.1.3 Oct 2016					
Custom ODBC Connection	ion Modules:	0				
Custom OLEDB Connect	tion	~				
🛶 Data Mashup	Balance Sheet Overrides					
😚 Essbase (XMLA)	😚 Balance Sheet Actual Balance					
Excel	Output Results					
↑↓ FluenceXL Cube Data Pr	Proxy 😯 Output Growth Rates					
↑↓ FluenceXL Database Da	ata Proxy 🕅 Output Margins					
FluenceXLWeb Server	Output Funding Input					
🌨 Google BigQuery	🕎 Output Funding Data	Recent Connection Recent Connection Connect Connect Connect Itia and New Zealand Demo am Demo				
😥 HDInsight	Output Funding					
IBM Cognos TM1	> Properties					
?	Cancel Save					

Once the connection is added, you will see it in the "Active connections" tab. If you are using multiple connections, you will see them all in this tab.

A Manage Connections			- 0	×
	Active Connections Recent Connections Net	w Connection		
Active Connections		Q	¢	1
ID : Server	: Database	: Cube	: 1	:
I Fluence Technologies (Tech	h Partner)\Fluence Technologies WS Planning, Budgeting and	Forecasting for Banking Balance Sheet Overrides		•••
?	Delete Cancel OK			

Sample data connection

We also provide a sample dataset that you can use to familiarise yourself with the product. To connect to it, simply choose the "Anaplan XL Reporting sample data" connection from the list of available connections.

A Manage Connections		- 🗆 X
	Active Connections Recent Connections New Connection	
Connection Builder		<u>ସ</u>
Connections T		Connect
Q	Databases:	Q
 Anaplan Amazon Redshift Analysis Services Analysis Services Azure Analysis Services Cube File 	Adventure Works Tabular Consolidation Demo	
Anapian XL Reporting sample data Atoti	Cubes:	Q
Gustom ODBC Connection S Custom OLEDB Connection A Data Mashup	 ✓ Internet Sales ✓ Model ✓ Reseller Sales 	
 Essbase (XMLA) Excel FluenceXL Cube Data Proxy 		
FluenceXL Database Data Proxy FluenceXLWeb Server	> Properties	
?	Cancel Save	

Some example reports which connect to the sample dataset are available to download through the Anaplan XL ribbon by choosing the Extras – "Sample Reports..." option. This will open a web page with the report pack.

Anaplan XL									모 Comments
$\begin{array}{c} & & & \\ & & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & &$	Connections	+ − o Custom M Calculations Manage	oo 🔊	Grids & PivotViev Tables * *	vs Formulae Selec	ction Task Pane	Workbook Slicers Tools	Options v Extras v Lookup Latitude/Longitude Refresh Dynamic Pictures Add/Edit Round Corners]
G	Н	I	J	К	L	М	1	Clear All Data Values Trace Function Errors Trace Query Errors Trace Writeback Errors	Q
								Import > Show Design Frame > Export Items from Web Import Items into Web	
								Samples > Video Tutorials Help Licensing About Anaplan XL Reporting	Tutorial 1 Tutorial 2 Sample Reports

Building a report

If you are very familiar with using pivot tables when connecting to Analysis Services cubes, we suggest reading this section first to highlight some key differences and enhancements in Anaplan XL Reporting. Otherwise, read on.

Anaplan XL Reporting has two main reporting modes, grids and formula. Grids are similar to a pivot table but optimised for data-connected BI. Grids are what most Anaplan XL Reporting users primarily use. Formula are well suited to highly formatted reports with a specific layout, which are relatively small in terms of the number of cells retrieved. The product also provides report slicers and a number of data visualisations and charts, which work well in business-focused dashboards and scorecards.

To add a new grid, on the Anaplan XL ribbon, choose 'Grids and Tables' and then 'Grid', to bring up the report designer screen below.

🗴 AutoSave 🔵 Off	୨୦୧୦⊽ Book2 - Exa	cel	,	
File Home Insert	Page Lavout Formulas Dat	a Review View Automate	Help Anaplan XL	
				~
Grids & Formula Favourites Tables ~ Report ~	Slicer In-Cell Dynamic Bu Chart Y Chart Y Clart	isiness Create Visualise Insert hart YMessage YFormula Y	C↑౨ ్రై ²² Publish to Parameters Web ∽ ~	Connectio Č
Grid	Design Grid	Insert	Web	
	Design a Grid from data in a Cube.	F G H	I J K	L
1 Table 2 3 4 5	Grids allow positioning of hierarchies on rows and columns, and support drilling, slice and dice, user calculations, and powerful ranking and filtering.			
6				
ayout wailable Hierarchies	Filters حکی Product Category حکی Promotions حکی Reseller Type	Member Selector Hierarchy Geography Members Display Advanced Members Display	∴ () \ ¹	~
Customer		Q Search	Selections	\otimes
> 🔀 Date		✓ All	United States	•••
> 🗙 Geography	Columns	> Australia	United States	
> 🔀 Product	R Date Calendar	> Canada	Children	
> 🗙 Promotion		> France	Descendants	te
> 🗙 Reseller		> Germany	Descendants at:	>
> 🗶 Territory		> United Kingdom	Descendants Betwe	een: >
		✓ United States	Next:	>
		> Alabama	Previous:	>
	Rows E	Arizona	More:	>
	Coography	California Colorado Connecticut Range Şilcer	Delete	
?			Cancel	ок

Report designer

The report designer is separated into 5 main areas:

1) Available hierarchies

Lists the available dimensions and hierarchies in the current model. Expand the dimension to view the available hierarchies. Drag the hierarchies you want to use from here into filters, columns or rows as needed.

2) Filters

A set of hierarchies for user selections, which will be displayed at the top of the grid. User selections made in the filter area determine the numbers displayed in the report body.

3) Rows and Columns

Containers for hierarchies to be positioned on rows and columns respectively.

4) Member selector

Surrounded in red in the screenshot above, the Member Selector displays the content of the selected hierarchy. The hierarchy tree can be expanded and members selected by dragging to the right. For a selected member, the drop-down menu enables selection of related sets of data such as children, lowest descendants or descendants at a level.

Range: Selections can also be based on the content of an Excel cell, or range of cells.

Slicer: Selections can also be based on an Anaplan XL slicer selection.

Press 'OK' to insert the report.

Note that if you regularly set up similar grids, you can add the report definition as a favourite (*) from the toolbar above 'Available Hierarchies', which can then be easily accessed from the main Anaplan XL ribbon.

AutoSave Off 🔚 🏷 🤆 🗢 Book3 - Excel	𝒫 Search		3 - 🗆 ×
File Home Insert Page Layout Formulas Data Review View Automa	ate Help Anaplan XL		🖓 Comments 🖻 Share 🗸
🖪 🗄 🖸 😭 📰 🚟 📶 📶 🖾 🍂	x 🗘 🖉 🗴 📰 🕫	•• 🔊 🖪 🐻 🐻	Options ~
Grids & Formula Favourites Slicer In-Cell Dynamic Business Create Visualise Inser Tables × Report × Slicer Chart × Chart × Message × Formul	ert Publish to Parameters Connections Custom Me ula * Web * * Calculations *	Iore Workbook V Format V Grids & PivotViews Formulae Selection Tables V V	Task Workbook Extras ~ Pane Slicers
Insert Data Insert	Web Manage	Refresh	Tools ^

Working with grids

Multiple grids can exist in the workbook, and in individual worksheets. Each grid is an Anaplan XL object, and is manipulated through the grid designer, the task pane, the grid ribbon or the Anaplan XL right click menu.

Grid components

- Filter area (C3:D4)
- Dimension labels (C3:C4, D7, C8)
- Selected dimension members (C9:C23, D8:H8)
- Data area (D9:J23)

	A B	С	D	E	F	G	н	1	J	К	Anaplan XL Reportin	g	~ ×
1											1 - Demo Data -> Adventure	Norks Tabular -> Model	~ Đ
2					Filter ar	ea					🖿 🖬 ★ 🐻 🖩	1 🖩 원 🕥	
3	Dimension	Measures	Internet Sales								Laurant Manchas Calanter		
4	Lahels	SalesTerritory	All					Data are	a		Layout Member Selector		
5	Lubero	QuickStart Example Grid		Grid [•]	Title						Du3	ΔII	~
6				ona							Available Hierarchies		
7			Date Calendar										Q
8		Product Category	-2021	+01 21	-02 21	+Apr 21	+May 21	+Jun 21	+03 21		Measures		
9		-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,429	\$ 1,608,751	\$ 1,878,318	\$ 1,949,361	\$ 50,841		> 🗙 Currency		
10		 Accessories 	\$ 407,050	\$ 173,551	\$ 199,755	\$ 62,674	\$ 71,880	\$ 65,201	\$ 33,745		> 🔀 Customer		
11		+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,640	\$ 2,520	\$ 5,400	\$ 3,720	\$ 2,400		> 🗙 Date		
12		+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,653	\$ 4,611	\$ 3,975	\$ 2,067	\$ 1,749		> 🗶 Geography		
13		 Bottles and Cages 	\$ 33,518	\$ 15,034	\$ 16,717	\$ 5,356	\$ 5,526	\$ 5,834	\$ 1,767		1 11 Part 1		
14		+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,043	\$ 549	\$ 731	\$ 763	\$ 350		Filters	Columns	Ŀ
15	Selected	+ Fenders	\$ 27,211	\$ 11,583	\$ 13,276	\$ 3,868	\$ 4,924	\$ 4,484	\$ 2,352		III Measures	Calenda	ar
16	dimensions	+ Helmets	\$ 132,752	\$ 55,634	\$ 67,706	\$ 21,134	\$ 23,828	\$ 22,744	\$ 9,412		SalesTerritory	-	
17	members	+ Hydration Packs	\$ 23,536	\$ 10,888	\$ 11,163	\$ 2,585	\$ 4,399	\$ 4,179	\$ 1,485				
18		+ Tires and Tubes	\$ 142,270	\$ 61,482	\$ 66,558	\$ 22,051	\$ 23,097	\$ 21,410	\$ 14,230				
19		- Bikes	\$ 9,162,325	\$ 4,024,025	\$ 5,138,299	\$ 1,514,049	\$ 1,775,297	\$ 1,848,954				Rows	Ŀ
20		+ Mountain Bikes	\$ 3,814,691	\$ 1,658,240	\$ 2,156,451	\$ 584,943	\$ 774,443	\$ 797,065				Reproduct Cate	gory
21		+ Road Bikes	\$ 2,920,268	\$ 1,280,739	\$ 1,639,528	\$ 503,620	\$ 556,675	\$ 579,233					
22		+ Touring Bikes	\$ 2,427,366	\$ 1,085,046	\$ 1,342,320	\$ 425,486	\$ 444,179	\$ 472,656					
23		+ Clothing	\$ 201,525	\$ 86,054	\$ 98,375	\$ 32,028	\$ 31,140	\$ 35,206	\$ 17,096		_		
24			L							-	Apply changes immediate	y Apply	
25											Display Settings		+ 100%

Anaplan XL Reporting grid Reporting task pane

Anaplan XL

Basic navigation

•

You can interact with the grid in a number of ways:

- Design grid (report designer)
 - To bring up the report designer for the current grid you can choose design grid from the grid
 - ribbon, or the right click menu, or can alternately double click one of the numeric cells in the grid. **Task pane**
 - You can turn on the grid task pane from the Anaplan XL ribbon and can then position and make selections in hierarchies here.
- Changing selections directly on the grid
 - For filters, double click on the filter selection or dimension label for the required hierarchy (C3:D4).
 For rows or columns, double click on the dimension label (C8/ D7). This brings up the Member Selector for the selected hierarchy.
- Drilling applies to members located on either rows or columns.
 - Drill up/down by double clicking on a member.
 - "Drill all" currently selected members by right clicking on a member and selecting the 'Drill all' option from the Anaplan XL menu.
- "Keep Only" / Quick selections
 - To quickly select only certain member/s which are currently shown in a grid
 - Click on the cell or cells containing the members, and right click and select Anaplan XL:
 - Keep Only (all selected members)
 - Keep all other Members (all unselected members)

Member Selector

The Member Selector is used in many of the Anaplan XL Reporting forms, including the report designer. By double clicking the hierarchy label in a grid, the user can bring up the 'Edit Hierarchy' window on its own for that particular hierarchy.

Edit Hierarchy - Product Category	_		×
Members Display Advanced			
S 🖿 🗊 🖫 🔍 🖡 🛈 🗘 🐻 👁			
Q Search Selections			⊗
✓ All Accessories			
> Accessories Mountain Bikes			•••
✓ Bikes			
> Mountain Bikes			
> Road Bikes			
> Touring Bikes			
> Clothing			
> Components			
> Others			
Range			
Slicer >			
			OK.
	Cance	21	OK

To select a member, drag or double click it to the right-hand pane of the window. Shift and ctrl keys can be used for multi-select.

The other main features of the Member Selector include:

- Member searching
- Member lists can be saved and loaded
 Image: Saved and loaded
 Image: Saved and loaded
 Image: Saved and loaded
- Dynamic selection options to select related sets of data.

🔥 Edit Hierarchy - Geography	- 0	× A Edit Hier	rarchy - Date Calendar		- 0	×
Members Display Advanced		Member	s Display Advanced			
	0 Q to 🕫 💿	8		D Q 16	۲	
Q Search	Selections	😣 🔍 Sear	rch	Selections		⊗
✓ All	Australia	••• × All		Dec 23 and Prev	ious: 11 Members	
> Australia	Canada	> 2	018		Dec 23	
Canada France Germany United Kingdom United States	France Canada Germany Children Junted States Lowest Descendants State Descendants at: City Descendants Between: Postal Code Provious: In Cell Chart More: Desten Desten	> 2 > 2 > 2 > 2 > 2 > 2 > 2 > 2 > 2 > 2	019 020 021 022 023 01 23 02 23 03 23 0 4 23		Children Descendants Lowest Descendants Lowest Descendants at: Descendants at: Next: Previous: Mexeess 1 In Cell Chart Kore:	> > = =
Range		Range			Delete	
Slicer V >		Slicer	× >			
?	Cancel	ОК ?			Cancel	ок

Member Selection drop-down menu hierarchies

Next and previous: useful in date

- 'Children of', or 'Descendants at' a chosen level, or 'Previous 'x'' which can be useful to create 'rolling period' date selections.
- Members can also be selected based on an Excel Range
 Or an Anaplan XL Reporting Slicer
- Filtering, ranking and sorting are available on the Advanced tab.

A Edit Hierard	chy - Date.Fiscal						-			×
Members	Display	Advanced								
Aggregate	Aggregate	~						t:	C ₁	Ð
Member Rank result Filter result Sort result Member si Outlier Gro Subset NonEmpty	t t earch puping >									
Exists										
Aggregate	Members									
Edit Remove it	em									
?							Car	cel		ок

• Member properties are available on the Display Tab

Range selection (base selection on an Excel range)

Range		=	
Slicer	Slicer at 'Sheet1'!\$G\$2 - Geography 🗸	>	

Using this method the user can specify a cell or a range of cells that will drive the Member Selection for a grid. This can be populated by any means, such as manual entry, copy paste, formulas, drop down lists, Anaplan XL Reporting Slicers etc. This is supported for hierarchies in the Filter, Column or Row areas of the Grid.

This approach can be used:

- In the report header area to allow the user to quickly type well known codes or names into a cell and have the grid refresh based on this input.
- On rows or columns, to cause the grid to refresh based on a range of cells held elsewhere in the workbook, and potentially populated by copy-paste, or by another application
- Note: Once the Excel range is chosen, related sets of data can still be specified (i.e. Children of or Descendants at a specified level).

Slicer (User makes selections using an Anaplan XL Reporting Slicer)

Range		
Slicer	Slicer at 'Sheet1'!\$G\$2 - Geography 🗸	>

(See page 16 for slicer creation) Here the user can choose an Anaplan XL Reporting Slicer which will drive the selection. The drop-down menu will list any slicers which exist in the workbook for the current hierarchy.

Once selected, related sets of data can still be specified if required (i.e. Children of, or descendants at a specified level). This is typically used to drive multiple grids from one Anaplan XL Reporting Slicer.

Formatting grids

Formatting a line item or measure: Open the Member Selector and select the element you wish to format, and then use the formatting button, shown below to set the Excel numeric format required for each element.

A Edit Hierarchy - Line Items	- 🗆 X
Members Display Advanced	
8 🖿 🖬 🖫 🔍 岸	i i i to 💿
Q Search	Selections
II Back Book Mortgage	Lending Rate
Cumulate New Book Mortgage	Total Mortgage
III Impaired Loans	Back Book Mortgage 🗘 …
Lending Rate	New Book Mortgage 🗘 …
II New Book Mortgage	Cumulate New Book Mortgage 🛛 🗘 …
II Total Mortgage	Impaired Loans 🗘 …
Total Mortgage (New Book and	Total Mortgage (New Book and B 🔇 …
Range Slicer Active cell in BBoo V	
?	Cancel

For more detail see our Wiki. Alternatively, see the section on **Grids > Formatting Grids** in the **Anaplan XL Reporting User Guide**. You can download the latest version from: User Guide

User calculations

There are two main types of dynamic user calculations in Anaplan XL Reporting - Grid Calculations and Workbook Calculations.

Grid calculations

Users can easily add calculations into a grid using an Excel formula. These calculations exist only in the current grid. This is done by right clicking on a member name in columns or rows, and selecting Anaplan XL – Add Calculation, or from the Grid Ribbon as highlighted below. This adds an additional column to the right (or beneath if on rows).

×	Auto:	Save 💽 Off) 📙 🍤	• ° • •	Book5 - Excel				2	,
Fi	ile H	Home Insert Page	e Layout Forr	nulas Data	Review Vie	w Automate	e Help Ar	naplan XL Grid	ł
[D	nesign R	Grid R	emove Empty	Breakout Drillthr	eough Transpos Explore	e Actions Ca	Column Ro Iculation Calcul	w Grid G ation Chart ~	ia
G7				~) : [× ~]	fx ∨ '+May	olumn Calculation		
	А	В	С	D	E	F	G	Н	
1									
2		Product Categories	All Products						
3		Promotions	All Promotions						
4									
5									
6			Date.Calendar						
7		Geography	+January 2022	+February 2022	+March 2022	+April 2022	+May 2022	+June 2022	
8		-All Geographies	£1,662,547.32	£2,700,766.80	£2,739,370.98	£2,204,623.41	£3,315,275.00	£3,415,479.07	
9		+ Australia	£63,379.63	£76,501.65	£200,598.15	£58,814.51	£116,068.37	£231,542.10	
10		+ Canada	£236,714.26	£322,799.15	£464,632.38	£385,506.67	£395,412.00	£585,197.06	
11		+ France	£40,814.59	£468,277.51	£88,275.47	£54,602.78	£605,404.06	£119,236.30	
12		+ Germany	£112,638.82	£145,259.76	£136,002.67	£161,515.15	£194,003.50	£135,701.45	
13		+ United Kingdom	£80,574.32	£151,047.79	£310,841.69	£110,014.25	£198,648.08	£425,979.11	
14		+ United States	£1,128,425.70	£1,536,880.94	£1,539,020.63	£1,434,170.05	£1,805,739.00	£1,917,823.05	
15									

- The title can then be typed in the column header area (default name is [Calc])
- The formula itself is typed into the first data row, using Excel
- The formula will then be propagated down through the other rows
- The row or column is now formatted in the same manner as the rest of the grid.
- The Calculation can be managed by using the options on the Anaplan XL Menu
- To change the calculation just overtype the formula
- To delete it, right click on the row/column title and choose Anaplan XL Calculation Delete Calculation

The calculation can be contained purely within the grid or bound to a cell(s) outside the grid. It can also incorporate Excel functions such as VLOOKUP etc, or Anaplan XL Reporting formula.

Workbook calculations (custom groupings / MDX)

These calculations are available throughout the current workbook. Users can quickly add custom groupings or sets into their reporting, from the right click menu in the Member Selector as shown below:

🔥 Edit H	lierarchy - Geography	/			\times
Memb	ers Display	Advanced			
8		Q 🗦 👬 () दे 🔂 💿		
Q Se	arch		Selections		⊗
~ All	Geographies Australia		Group Members	- 0	×
>	Canada		Function to apply to group: Auto (Aggregate)		~
>	France Germany		Name for grouping: Europe		
>	United Kingdom	Select Members Clear and Select Members	Parent for grouping: All Geographies		~
,	United States	Group Members Create Named Set	•	OK Car	ncel
		Calculated Value Rename Member in this Wo	rkbook		
Range Slicer		■			
?				Cancel	ОК

Then name the grouping as required and choose the parent element which the group is to appear under.

The new element will appear as a custom calculation in the member selector. Creating a set of members is handled in a similar way.

To amend or delete a grouping or set created in this way, or to create a more complex MDX calculation select the custom calculation tab on the Anaplan XL ribbon.

For more detail, see the section on **Grids > Grid Calculations** in the **Anaplan XL Reporting User Guide.**

Slicers

Slicers in Anaplan XL Reporting offer more display options and flexibility in selection than those available in native Excel. They have 5 different display types and can contain members from different levels of the hierarchy, support cascading and filtering between slicers, and can incorporate ranked and filtered results. This section covers the basics of usage. Alternatively, see the section on **Slicers** in the **Anaplan XL Reporting User Guide.**

To add a slicer to a grid, right-click on the relevant hierarchy member in the filter area and choose Anaplan $XL \rightarrow$ 'Add Slicer'. The default will be an in-cell tree view with the default or last active member selected.



Note that once inserted, grid slicers can be positioned where required, they are not restricted to the grid area. This is done by right-clicking, and selecting 'Move/Size' then dragging the control to the desired position

Measures	Internet Sale	25	
SalesTerritory	All	~	
		Edit	
		Refresh	
	Date Cale	Marca (0)	
Product Category	-	Move/Size	
-All	\$ 9,770	Сору	5
- Accessories	\$ 407	Delete	\$
+ Bike Racks	\$ 22,-	20 9 0,000	5

Once inserted, right click on the slicer and choose 'Edit' for configuration and design options.

Insert Hierarchy Slicer						_		×
1> AW Sales - Finance - Planning -> Channel Sale	es				~	•	$\mathbb{F}_{\mathbf{r}}$	¢
Selection Filters Appearance Behaviou	Ir MDX		Accessorie Bikes Clothing Componen	es 1ts				
DISPLAY								
Slicer Type :	Combo tree	Combo box	Buttons	List box	Member selector	Slider		
TITLE								
Name :								
Show title bar:								
Title from cell:								
Show enable/disable button:								
OPTIONS								
Show 'All' item:								
Indent Members by level:								
Print object:	~							
Placement:	Move and Size							~
?						Canc	el	ОК

Dimension Slicer – Edit

C 111	-
Slicer	lype:
	·

All Products	~	Accessories
 All Produ Acce Bikes 	cts ssories	Accessories Bikes Clothing
P Cloth	ina	Compagate
Accessories	Bikes	Accessories Bikes
Clothing	Components	Clothing Components
Member Selector		
Al Periods	All Periods	

Choose the required slicer display type in the "Appearance" tab and then using the Member Selector in the "Selection" tab, choose the set of members to enable selection from.

For a tree view, no set of members need be chosen, as the user can navigate the hierarchy. For the other display types it is important to choose the set to be used. These can be either static lists of members, or dynamic selections such as children or/descendants at level, Level 'x' or even ranked lists etc. Note that the slicer content can also be driven from an Excel cell, by using the Range selector (e.g. Children of E11'), or from the result of another slicer.

Slicers can also update a specified range which could be used as the argument for XL3Lookup formula or for a report title. This is enabled by checking the 'Update range with selection' option which is in the "Behaviour" tab and specifying the output cell. It can be either the Unique Name or the

caption.

A slicer can be used to drive one or several grids. The easiest way to do this is to simply select the slicer within the Member Selector for the relevant hierarchy for the secondary grids.

Measures	Internet Sales			🔥 Re	port D	lesigner															-		×
SalesTerritory	All v			1 - D	Demo	Data -> Ad	ventur	e Works T	abular	-> Internet Sales				~	Đ			*	t 8			₽₹	۲
				Layou	ıt							Mem	ber Se	elector	_								
	Date Calendar																						
Product Category	-2021	+Q1 21	-Q2 2	A	ble L	lananahian	Ð		/ Fi	Iters		Hiera	archy	Sales	erritory	,							~
-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,42	Availa	able H	lierarchies			- F	L. Measures			,		,								-
- Accessories	\$ 407,050	\$ 173,551	\$ 199,75					0		III measures													
+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,64						<u> </u>	SalesTerritory		M	embers	i Di	splay	Adva	nced						
+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,65		lu N	N easures								_									
+ Bottles and Cages	\$ 33,518	\$ 15,034	\$ 16,71									\mathbf{x}			10	ବ	E.	Å	h G) (СВ	6	۲
+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,04	>	X	Customer								_		-	*					·	
+ Fenders	\$ 27,211	\$ 11,583	\$ 13,27										Sear	ch					Select	ions			
+ Helmets	\$ 132,752	\$ 55,634	\$ 67,70	>	× 1	Jate												_					
+ Hydration Packs	\$ 23,536	\$ 10,888	\$ 11,16	>	X F	Product						>	All						Drag s		ons here		
+ Tires and Tubes	\$ 142,270	\$ 61,482	\$ 66,55		••																		
+ Bikes	\$ 9,162,325	\$ 4,024,025	\$ 5,138,29	>	XF	romotion			C	olumns	E:												
+ Clothing	\$ 201,525	\$ 86,054	\$ 98,37	>	XI	Ferritory			-	🛠 Date Calendar													
Measures SalesTerritory	Internet Sales All																						
	Date Calendar		-																				
Product Category	-2021	+Q1 21	-Q2 2																				
-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,42								La												
- Accessories	\$ 407,050	\$ 173,551	\$ 199,75						R	ows	L°,												
+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,64							Read Product Category													
+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,65							•													
+ Bottles and Cages	\$ 33,518	\$ 15,034	\$ 16,71																				
+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,04																				
+ Fenders	\$ 27,211	\$ 11,583	\$ 13,27									-	- 6		+ 10h	1110000	Oplay						
+ Helmets	\$ 132,752	\$ 55,634	\$ 67,70									Ran	ge	Silcera	t Snee	11:5055	- Sales	sternit	лу				
+ Hydration Packs	\$ 23,536	\$ 10,888	\$ 11,16									Slic	er			ute	. [
+ Tires and Tubes	\$ 142,270	\$ 61,482	\$ 66,55											blicer at	Sneet	19C 1	1	2					
+ Bikes	\$ 9,162,325	\$ 4,024,025	\$ 5,138,29																				
+ Clothing	\$ 201,525	\$ 86,054	\$ 98,37	?																	Cance	1	ок

'Slicer' is an additional selector at the bottom of the Member Selector which will make available any slicers which exist in the workbook for the current hierarchy, as shown. Pick the required slicer and use the "." to select it. Once the slicer is selected, any related set of data is then available, for example 'children of', or 'descendants at level x'.

Workbook slicers

Slicers can also be created at the workbook level – these can then be displayed for all sheets in the workbook.

The slicers are displayed in a pane which stays in place when the sheet is changed. In a multi-sheet workbook, you need to only define one set of slicers. These can then be configured to be shown or hidden for individual sheets as needed.

LCubec	l Work	book Slicers									
te Calendar		Pr	oduct Category			SalesTerr	itory				
2019	2020	2021 A	I			~ All				~	
10		\checkmark : $\times \checkmark f_x$	407050.25								
Α	В	С	D	E	F	G	Н	I.	J		
		Measures	Internet Sales								
		SalesTerritory	All								
			Date Calendar								
		Product Category	-2021	+Q1 21	-Q2 21	+Apr 21	+May 21	+Jun 21	+Q3 21		
		-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,429	\$ 1,608,751	\$ 1,878,318	\$ 1,949,361	\$ 50,841		
		- Accessories	\$ 407,050	\$ 173,551	\$ 199,755	\$ 62,674	\$ 71,880	\$ 65,201	\$ 33,745		
		+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,640	\$ 2,520	\$ 5,400	\$ 3,720	\$ 2,400		
		+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,653	\$ 4,611	\$ 3,975	\$ 2,067	\$ 1,749		
		+ Bottles and Cage	s \$ 33,518	\$ 15,034	\$ 16,717	\$ 5,356	\$ 5,526	\$ 5,834	\$ 1,767		
		+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,043	\$ 549	\$ 731	\$ 763	\$ 350		
	LCubec te Calendar 2019 LO A	LCubed Work te Calendar 2019 2020 LO A B	LCubed Workbook Slicers te Calendar Pr 2019 2020 2021 Al 10 \checkmark : $\land \checkmark f_x$ A B C Measures SalesTerritory A B C Measures SalesTerritory A A B A B C Measures SalesTerritory All - Accessories + Bike Racks + Bike Stands + Bottles and Cage + Cleaners	LCubed Workbook Slicerste CalendarProduct Category201920202021All10 \checkmark : $\checkmark fx$ 407050.25ABCDABCDMeasuresInternet SalesASalesTerritoryAllAODate CalendarAProduct Category-2021AASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryABSalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryAASalesTerritoryABSalesTerritoryAASalesTerritoryAAABASalesTerritoryAASalesTerritoryAAABABABABAAABABABABABAB <td< td=""><td>LCubed Workbook SlicersProduct Category201920202021All10\checkmark:$\checkmark f_x$407050.25ABCDEMeasuresInternet SalesAMeasuresInternet SalesASalesTerritoryAllAProduct Category-2021+Q1 21AProduct Category-2021+Q1 21AAAAll-AllABCDate CalendarAAAll\$ 9,770,900\$ 4,283,630A-All\$ 9,770,900\$ 4,283,630A-All\$ 22,920\$ 8,880A+ Bike Racks\$ 22,920\$ 8,880A+ Bike Stands\$ 20,670\$ 8,268A+ Bottles and Cages\$ 33,518\$ 15,034A+ Cleaners\$ 4,174\$ 1,781</td><td>Product Category Product Category All 2019 2020 2021 All L0 * * f_x 407050.25 A B C D E F Measures Internet Sales All C D E F Measures Internet Sales C D All C D E F Measures Internet Sales C D All C D Product Category All C C Product Category -2021 +01 21 -Q2 21 -All \$ 9,770,900 \$ 4,283,630 <th co<="" td=""><td>LCubed Workbook Slicers Product Category SalesTerr 2019 2020 2021 All All Internet Category All Internet Sales F G Internet Sales C D E F G Measures Internet Sales C D Internet Sales Internet Sal</td><td>LCubed Workbook Slicers Product Category SalesTerritory 2019 2020 2021 AII AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory A B C D E F G H Measures Internet Sales Image: SalesTerritory AII AII Image: SalesTerritory AII Image: SalesTerritory AII Internet Sales Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII</td><td>LCubed Workbook Slicers salesTerritory SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All 2019 2020 2021 All V f.x 407050.25 A B C D E F G H Measures Internet Sales All Internet Sales All Internet Sales All Internet Sales All Internet Sales All Date Calendar Internet Sales All Internet Sales Sales Territory All Internet Sales All Internet Sales All Internet Sales Sales Territory Internet Sales Sales Territor</td><td>LCubed Workbook Slicers Product Category SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All All </td></th></td></td<>	LCubed Workbook SlicersProduct Category201920202021All10 \checkmark : $\checkmark f_x$ 407050.25ABCDEMeasuresInternet SalesAMeasuresInternet SalesASalesTerritoryAllAProduct Category-2021+Q1 21AProduct Category-2021+Q1 21AAAAll-AllABCDate CalendarAAAll\$ 9,770,900\$ 4,283,630A-All\$ 9,770,900\$ 4,283,630A-All\$ 22,920\$ 8,880A+ Bike Racks\$ 22,920\$ 8,880A+ Bike Stands\$ 20,670\$ 8,268A+ Bottles and Cages\$ 33,518\$ 15,034A+ Cleaners\$ 4,174\$ 1,781	Product Category Product Category All 2019 2020 2021 All L0 * * f_x 407050.25 A B C D E F Measures Internet Sales All C D E F Measures Internet Sales C D All C D E F Measures Internet Sales C D All C D Product Category All C C Product Category -2021 +01 21 -Q2 21 -All \$ 9,770,900 \$ 4,283,630 <th co<="" td=""><td>LCubed Workbook Slicers Product Category SalesTerr 2019 2020 2021 All All Internet Category All Internet Sales F G Internet Sales C D E F G Measures Internet Sales C D Internet Sales Internet Sal</td><td>LCubed Workbook Slicers Product Category SalesTerritory 2019 2020 2021 AII AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory A B C D E F G H Measures Internet Sales Image: SalesTerritory AII AII Image: SalesTerritory AII Image: SalesTerritory AII Internet Sales Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII</td><td>LCubed Workbook Slicers salesTerritory SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All 2019 2020 2021 All V f.x 407050.25 A B C D E F G H Measures Internet Sales All Internet Sales All Internet Sales All Internet Sales All Internet Sales All Date Calendar Internet Sales All Internet Sales Sales Territory All Internet Sales All Internet Sales All Internet Sales Sales Territory Internet Sales Sales Territor</td><td>LCubed Workbook Slicers Product Category SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All All </td></th>	<td>LCubed Workbook Slicers Product Category SalesTerr 2019 2020 2021 All All Internet Category All Internet Sales F G Internet Sales C D E F G Measures Internet Sales C D Internet Sales Internet Sal</td> <td>LCubed Workbook Slicers Product Category SalesTerritory 2019 2020 2021 AII AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory A B C D E F G H Measures Internet Sales Image: SalesTerritory AII AII Image: SalesTerritory AII Image: SalesTerritory AII Internet Sales Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII</td> <td>LCubed Workbook Slicers salesTerritory SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All 2019 2020 2021 All V f.x 407050.25 A B C D E F G H Measures Internet Sales All Internet Sales All Internet Sales All Internet Sales All Internet Sales All Date Calendar Internet Sales All Internet Sales Sales Territory All Internet Sales All Internet Sales All Internet Sales Sales Territory Internet Sales Sales Territor</td> <td>LCubed Workbook Slicers Product Category SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All All </td>	LCubed Workbook Slicers Product Category SalesTerr 2019 2020 2021 All All Internet Category All Internet Sales F G Internet Sales C D E F G Measures Internet Sales C D Internet Sales Internet Sal	LCubed Workbook Slicers Product Category SalesTerritory 2019 2020 2021 AII AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory A B C D E F G H Measures Internet Sales Image: SalesTerritory AII AII Image: SalesTerritory AII Image: SalesTerritory AII Internet Sales Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII Image: SalesTerritory AII	LCubed Workbook Slicers salesTerritory SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All 2019 2020 2021 All V f.x 407050.25 A B C D E F G H Measures Internet Sales All Internet Sales All Internet Sales All Internet Sales All Internet Sales All Date Calendar Internet Sales All Internet Sales Sales Territory All Internet Sales All Internet Sales All Internet Sales Sales Territory Internet Sales Sales Territor	LCubed Workbook Slicers Product Category SalesTerritory All 2019 2020 2021 All 2019 2020 2021 All All

VI Cubad Workbook Slicors

Formula reporting

In Formula mode, the data is returned via a collection of Anaplan XL Reporting Formula. Each cell contains a formula rather than just the data itself. Each cell is self-sufficient and using this approach it is possible to put any value in any cell, and therefore to have fully disjoint reports. Formula reports will often be preferred where the required formatting is complex, or where existing 'static' financial reports are being replaced.

Most formula reports are built primarily using two Anaplan XL Reporting formula.

XL3Lookup - the key formula which retrieves the cube value from a specified slice, and will normally reference several XL3Member formula, or text cells in Excel which specify valid member names.

XL3Member - returns the caption for a specified member, and these are then referenced by xl3lookups

SUM	→ (× ✓ f _x =XL3Look	up(1,"Account.Accounts",P	L!\$E9,"Date.Fiscal"	,PLIE\$4,"Depar	tment.D	epartmen	ts",PL!\$E\$3	"Measures", F7,"	Organization	.Organiz	ations", PL!\$
A	DE	F	G	Н	J	K	L	М	N	0	Р
4											
2 Organi	Zation AdvantureWorks Cucle										
3 Depart	ment Corporate										
A Period	EV 2002										
5	1 2002										
6		Income Statement									
7	This Period	Actual	Budget	Variance							
8	Net Sales	16,100	17,786	(1.686)							
9	Total Cost of Sales	3."Measures".F7."0	5.937	(552)							
10	Gross Margin	10,714	11,849	(1,134)							
11	% of Sales	67%	67%								
12											
13	Cost of Operations										
14	Labor Expenses	4,976	4,869	107							
15	Travel Expenses	187	172	15							
16	Marketing	40	42	(2)							
17	Telephone and Utilities	254	240	14							
18	Depreciation	250	230	20							
19	Commissions	531	526	5							
20	Office Supplies	43	45	(2)							
21	Professional Services	29	27	2							
22	Other Expenses	28	28	0							
23	Rent	92	86	5							
24	Operating Expenses	6,429	6,265	164							
25	Operating Profit	4 005	5 504	(4.200)							
20	Other Income and Expanse	4,285	5,584	(1,299)							
28	Taxes	10									
29	10/03	1,001									
30	Net Income	3 250	5 584	(2 334)							
24	net moothe	5,250	0,004	(2,004)							

Formula versus grid based reporting: key differences

- Formula mode supports 'any value in any cell' reports need not be rectangular in shape.
- One block of a report can include data from several cubes, as the first formula parameter is the connection id.
- In formula mode Excel functionality is used for all formatting etc.
- In formula mode, you cannot return to 'Report Designer' to change the report structure or to slice and dice by another hierarchy this is only available at the initial design.
- Formula reports do not handle row-dynamic reporting, where the number of rows varies by a filter selection or with underlying data changes.
- For large reports in terms of the number of cells returned, a grid will always be faster than the equivalent formula report as it does not have the overhead of additional formula to fire.

Creating formula reports

There are several ways to create Formula reports, but the most common is to convert a grid.

1) Convert to Formula from a Grid

- Create a grid using the Grid option to get the initial layout.
- Then right click anywhere in the data area of the grid, select the Anaplan XL -> Convert To... -> Formula menu option.

	Date Calendar			Calib	ri v 10 v A^ A 📺 v	%	,	Ē.		
Product Category	-2021	+Q1 21	-0	B		<u>.</u> 0.	00	3 21		
-All	\$ 9,770,900	\$ 4,283,630	\$ 5,430	,		.00	20	,841		
- Accessories	\$ 407,050	\$ 173,551	\$ 199	لععد	0.00.074 0.74.000 0	-	201	\$ 33,745		
+ Bike Racks	\$ 22,920	\$ 8,880	\$ 1 :	Sear	rch the menus	7	720	\$ 2,400		
+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10		AnaplanXL	>		Properties		
+ Bottles and Cages	\$ 33,518	\$ 15,034	\$ 1)					rioperties		
+ Cleaners	\$ 4,174	\$ 1,781	\$:	X	Cu <u>t</u>			Design Grid		
+ Fenders	\$ 27,211	\$ 11,583	\$ 1	Ē	Сору			Refresh Grid		
+ Helmets	\$ 132,752	\$ 55,634	\$ 6		- 17					
+ Hydration Packs	\$ 23,536	\$ 10,888	\$ 1:		Paste Options:			Drill Across	>	
+ Tires and Tubes	\$ 142,270	\$ 61,482	\$ 6		r ^e n			Breakout Value		
+ Bikes	\$ 9,162,325	\$ 4,024,025	\$ 5,13							
+ Clothing	\$ 201,525	\$ 86,054	\$ 9		Paste <u>S</u> pecial			Drillthrough		
				ø	Smart <u>L</u> ookup			Apply	>	
					Incert	_		Actions		
			_					Formatting	>	
					<u>D</u> elete			Tornatang		
					Clear Co <u>n</u> tents			Copy Grid		
				<u>/</u>	Quick Analysis			Convert to	>	Formula
					Filt <u>e</u> r	>		Grid Chart	>	Flex Report
					S <u>o</u> rt	>		Delete Grid		Freeform Report
					Get Data from Table/Range					Values

2) Insert Formula manually

- This approach can be useful for small sections of a report, for the main body of a report converting a Grid will typically be faster. From the Anaplan XL main menu 'Insert Formula', there are several options for inserting different types of Formula.
- A combination of 'Insert Member' and 'Insert Value', along with copy formula down and across means it is also fairly simple to create reports using this approach.

3) Design Formula Report

• Selecting 'Formula Report' option from the Anaplan XL ribbon directly inserts a formula report. Generally converting a grid to Formula is a better option, as the initial layout can be quickly verified and/or changed while it is a grid prior to conversion.

Once inserted, formula can easily be copied around and re-referenced to create the exact report format required. The standard Excel rules apply, so pay careful attention to the correct pinning (\$) of cell references when copying formula.

Charting and data visualization

Dynamic charts (small multiples)

Anaplan XL Reporting dynamic charts are highly interactive visual tools. They can be setup to use individual charts to display each slice of a data set. The axes are on a common scale and the only variable is the data set slice being changed. They make it easy to see shared trends, patterns or outliers across the data set.



Dynamic charts can be built from the Anaplan XL ribbon.



A task pane for the chart will appear where selections can be made to define which series and members will be displayed. Categories defines the x-axis within each individual chart. Series defines the of data series to be charted.

Anaplar	XL v x	1	1			
Layout	■ ● ≈ 兆 ७ □	2 3 4	т	Mountain Bikes	Road Bikes	Touring Bikes
	Layout Member Selector	5	400K			
Chart Type	Available Hierarchies	7 8		the second s		
Format	٩	9 10	100K			
	III Measures	11 12	0K			
	> 🗙 Customer	13	500K			
	> 🗙 Date	14	400K			
	> 🗙 Product	16 17	8 300K			
	> 🗙 Promotion	18	200K			
	> 🗙 Territory	19 20	23			
	Values	21	NOT C			
		23	0K 500K			
	Columns V Auto Wrap	24 25	400K			
	Reproduct Category	26	3006			
	Rows	28	ipad			
	R SalesTerritory	29 30	200K			
	Categories	31	100K			
	😪 Date Calendar	32	× *	\$ \$ \$ \$ \$		* * * * * *
	Series	34 35	Jan. Lap.	they been they here he	, tep, the, by, ted, inc. i	8° 68° 48° 48° 48° 48°

The data can be split into separate charts at any level by dragging and dropping the desired hierarchies into columns and rows.

Clicking on a hierarchy takes you to the member tab to select members/levels. Additionally, you can drive the data selection by using slicers or Excel ranges.



Moving a hierarchy to Filters will apply a filer to the data. By moving the Measures to the Filters you can add to and or change the currently charted measure.

For more detail see our Wiki or YouTube tutorial. Alternatively, see the section on **Charting & Data Visualisation > Dynamic Charts (Small Multiples)** in the **Anaplan XL Reporting User Guide.** You can download the latest version from: User Guide.

Standard Excel charts

Anaplan XL Reporting operates within Excel and as such any data retrieved into the workbook using Anaplan XL Reporting can be charted using any standard Excel chart type. If the data being plotted is static in shape and you need very fine grain control over the chart formatting, this is likely the best approach.

In-cell charts

In-cell charts are small, focused charts which each fit within one Excel cell. They are designed to be used within tables of data and allow the mixing of numbers and charts together in tables. They are often a very space-efficient way to give context to or highlight outliers in a data table.

p12 Months				
1 Activity	12m trend Actual	12m trend Actual:Budget	Actual \$	Budget \$
House Expense	~~~~	Transfer of	23,309	23,087
Savings	$\neg \lor$		11,500	12,000
Dine Out	m	H.J.J.J.	8,864	4,800
Entertainment	~~~		6,556	2,400
Misc	A		5,635	
Travel	_^_		4,466	4,800
Car Expense	~~~	I, d. do.	3,839	4,839
Grocery	m	Inddda,	3,682	6,000
Clothes			1,875	1,200

In-cell Charts can be used in two ways within Anaplan XL Reporting:

Formula-based: where an Anaplan XL Reporting formula controls the chart and the data being plotted must first be returned into Excel.

Embedded in grids: where the charts are generated directly as part of the gird and support data growth.

Treemaps

A Treemap is a way to display hierarchical information using nesting rectangles or tiles. They are most often set up where the size of the rectangle depicts one metric and the colour depicts another. They can often help identify patterns which would otherwise be difficult to see.

Tires and Tu	ibes				Bottles and	d Cages				
Patch KIVS Patches Mountain Tire Tube Ro 3191 2005 22 7307.39 15444.05 94		e Road Tire Tube 2376 9480.24	Water Bottle - 30 oz. 4244 21177.56			untain Botti 5 29.75	Road Bottle 1712 15390.88			
Touring Tire	Tube		LL Road Tire	ML Road Tire	Helmets Sport-100 2230	Sport-100 Helmet, 2125	Blu	Fenders Fender Se 2121	et - Mou	ntain
1488 7425.12			1044 22435.56	926 23140.74	78027.7	74353.75		46619.58		
HL Mountain	ML Mou	untai		LL Mountain Tire				Cleaner	Hydrat	tion
48860	34818	39	Touring Tire	21541.38		Sport-100 Helmet,	Blac	Bike Wa	Hydrat	ion Pa
935 27105.65		935	935			72954.15		908	733	
		27105.65	HL Road Tire				7218.6	40307.67		
				858					Bike	Bike
				2/9/0.8					Hitch	All-P
									520	2+7

For more detail see our Wiki. Alternatively, see the section on **Charting & Visualisation >Treemaps** in the **Anaplan XL Reporting User Guide.** You can download the latest version from: User Guide

Mapping

Anaplan XL Reporting provides point and shape-based geospatial mapping. The maps can be zoomed and panned as needed and can be used as a selector for a report as well as just a display.



Viewports

Viewports are a dynamic view of another part of a workbook. They can be used to produce a consolidated view of a complex workbook and can be useful in dashboards and in handling some of the layout challenges of variable length or width reports. For example, you can present a range of data held on one worksheet within a much smaller area on another worksheet. They are scrollable and retain interactivity. If the viewport contains a grid, that will still be drillable and editable even through the viewport.

A	B C	DE	F	G	н	1	J	K	L		М	Ν	
1			Sales V	olumes		Trend	A	ctual : Targe	et		V	1.1	12
	Florida	Q1 CY 2014 \$101,519	Q2 CY 2014 \$143,610	Q3 CY 2014 \$260,646	Q4 CY 2014 \$216,112	12m Trend	0%	100% 20	25	~		- Bette	Res
	Georgia	\$80,329	\$66,306	\$85,339	\$86,462	m	-					1	
	Illinois	\$16,725	\$19,600	\$22,255	\$21,658	m	-			_		antrance co	0
	Indiana	\$139,679	\$172,239	\$54,224	\$54,343	Min	-					San J	
	Maine	\$84,471	\$93,965	\$45,822	\$18,230	M	-					•	· CAL
	Michigan	\$79,049	\$148,155	\$189,511	\$158,069	m	-	-					San Lun
	Minnesota	\$43,255	\$50,004	\$36,239	\$28,356	m	-						179
	Mississippi	\$23,586	\$36,487				-						- K.,
I	Missouri	\$139,294	\$159,920	\$274,856	\$250,908	m	-		•				
I	Nevada	\$43,334	\$48,213	\$112,894	\$83,081	min							
I	New Hampshire	\$202,540	\$278,229	\$182,918	\$141,514	m	-	-					
	New Mexico	\$24,017	\$42,654	\$67,372	\$46,907	m	_	-			CO.M.		
l	Marris Marala						-			×	ic are		
	# Top and Botton	n Products	Sales	Amount	Gross Profi	t 0 50 100	150	Profit I	Margin%	05	10% 20%	30%	Order
	1 Mountain-200 B	Black, 46	£	525,094	£121,956	5			23.2%				
	2 Mountain-200 B	Black, 38	£	652,465	£102,846	5			15.8%				
	3 Mountain-200 B	Black, 42	£	587,192	£102,675	5			17.5%				
	4 Mountain-200	Silver, 42	£	461,800	£96,036	5			20.8%				
	5 Mountain-200 S	Silver, 46	£	467.368	£94.010				20.1%				

Viewports can also reference Excel charts directly or as part of a range. Paged Viewports allow for simple icon-led navigation between several Viewport. Users can click an icon to change the viewport currently being displayed within the paged viewport as shown below by the highlighted icon.

7 ↓:∷∭	Web Sales	⊕ €	🐔 💭 Web Sales	Ð,
			£700.000	- United States
Canada			£600,000	
France			£500,000 -	Australia
Germany			£400,000 -	
United Kingdom			£300,000	Germany
United States			£200,000	
Australia			£100,000 -	- France
1	E0 £500,000 £1,000,000 £1,500,000 £2,000,000 £2,500,000	£3,000,000 £3,500,000	£0 Jan 2007 Mar 2007 May 2007 Jul 2007 Sep 2007 Nov 2007	— Canada

Viewports, Paged Viewports and Popup Viewports are inserted from the Visualise ribbon item.

Appendix 1 – Corporate deployment

Anaplan XL Reporting can be deployed silently by IT to the user base using standard desktop deployment tools. For more information on silent installation, see here: <u>https://help.anaplan.com/anaplan-xl-reporting-silent-installation-92c87d07-ae25-49d3-bd4b-2f0709a1ecd1</u>

Anaplan XL Reporting has the following pre-requisites, however, if your scripting team prefer to pre-install the pre-requisites you can extract the .MSI installer as described on the second link below.

- <u>https://help.anaplan.com/anaplan-xl-reporting-excel-edition-prerequisites-64c7efb7-78db-47f9-adf5-bdc8030ba67e</u>
- https://help.anaplan.com/anaplan-xl-msi-installation-45a17574-e7f9-4507-b39b-ad4e840f99c7

The product license key can be deployed to all users as a final step in the scripted installation by copying the provided license.license file to one of the locations below:

- the user's roaming profile (equivalent of %appdata%\Roaming\XLCubed Ltd\XLCubed Excel Edition)
- the installation folder C:\Program Files (x86)\Anaplan\Anaplan XL Reporting. (Note this approach means it is valid for all users on the machine, so generally not applicable for Citrix.)

If the product has been installed by an administrator id, but the user has a different id the steps below will enable the add-in for the end user.

For more information, see here: <u>https://help.anaplan.com/administrative-anaplan-xl-installation-6198933c-7c72-4536-be32-1e7f15f7f51b</u>