

Anaplan Management Reporting

Get Started Guide

Anaplan



Table of contents

01. Add a report page
 02. Start editing your page
 03. Include dynamic text
 04. Add an image
 05. Layer cards
 06. Add dynamic icons
 07. Add and customize charts
 08. Duplicate and align cards
 09. Add and format your table cards
 10. Edit page selectors
 11. Display and distribution options
 12. Additional report page settings
-

Prerequisites:

- Must be a Page Builder
- Must have access to the model

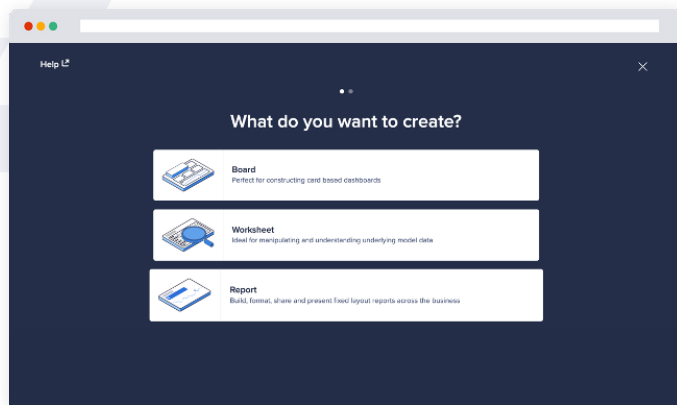
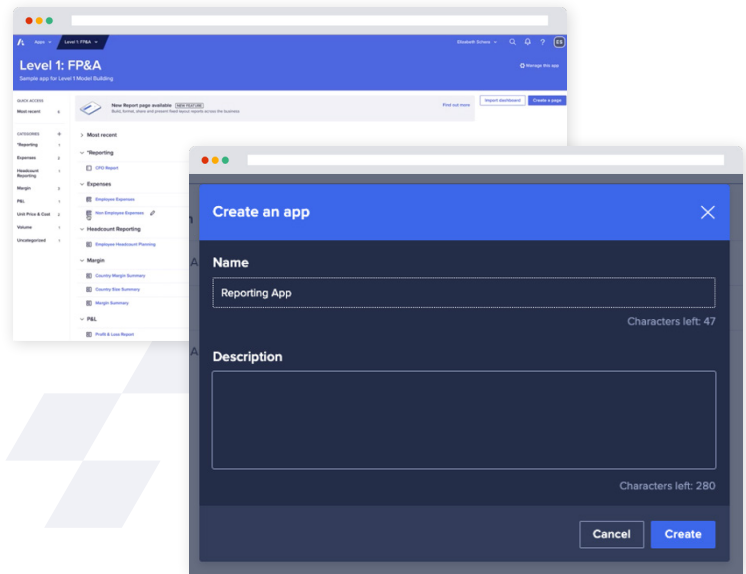
Please note:

Basic Anaplan UX (User Experience) terminology, set up steps or concepts will not be covered in the guide.

Add a report page

Step 1: Create an app

You can either add your report pages to an existing app or create a new app specifically for your report pages.

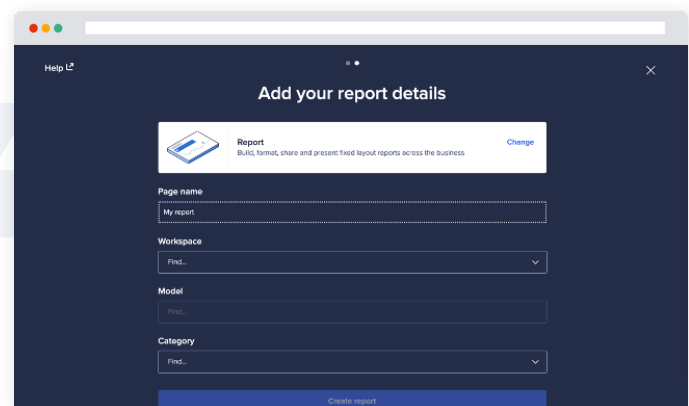


Step 2: Create a page

- In the app, click on “Create a page”
- In the pop-over, select “Report”

Step 3: Add report details

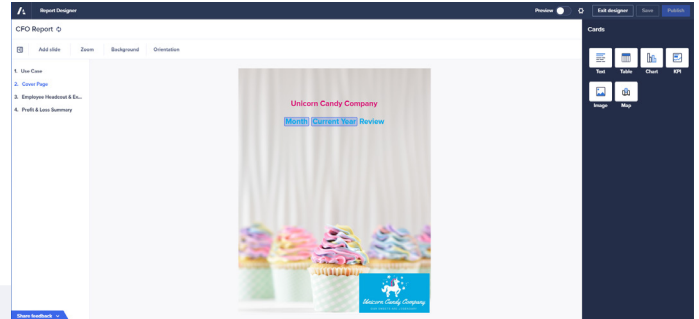
- Give the page a name
- Choose the workspace and model that will be associated with the slides in your Management Report page



Start editing your page

Enter report designer

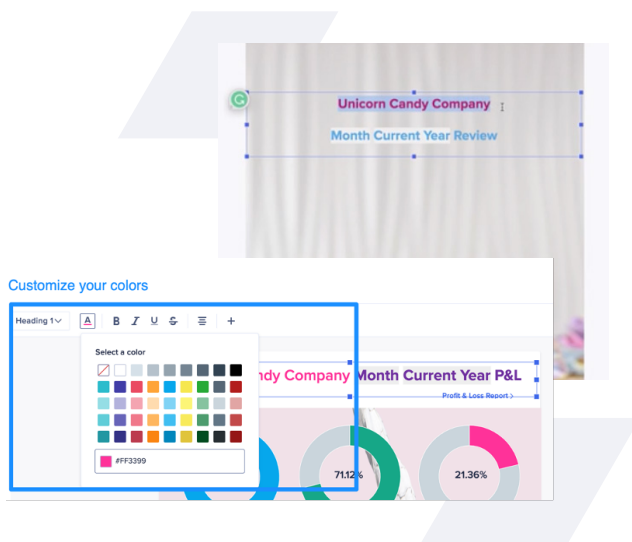
Click on the edit/pencil icon on the top right corner of your screen to enable Report Designer. Once in Report Designer, you will see the different card options available for Management Report pages.



Add and customize the text card

Once you are in Report Designer, drag and drop the text card onto your slide.

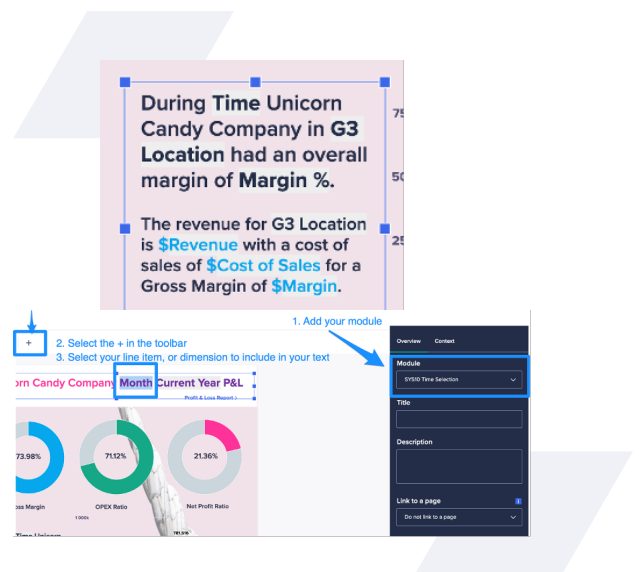
In Management Report, you can easily resize the text card to fit your desired layout. Freely type your narrative directly within the text box. After entering your text in the box, highlight the elements you want to customize, then choose from the menu of options (e.g., size, color, alignment,...) from the toolbar ribbon.



Include dynamic text

Set up dynamic text

Create dynamic text by associating a module with your text card in the card configuration menu. After the modules are selected, click the plus icon in the ribbon and choose either your line items or module dimensions to update dynamically. Your chosen dimensions will dynamically update with your page selectors if you enable the context in the card configuration menu.

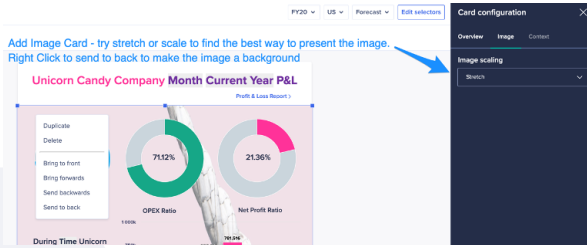


Add an image card

Stretch or scale an image card

Images are a key component to making your report presentation worthy.

You can add a URL directly to the image card in the card configuration menu, allowing for quicker configuration. If you want to reuse your image or update it centrally, you can continue using your URL formatted line items from your underlying module. You can also stretch or scale your image within or to the image card borders. Scale is particularly helpful for images that may vary in size



Layer cards

Layer, bring to front, back, duplicate, or delete cards

Another powerful tool within Management Reporting is the ability to layer cards

By right-clicking on any card, another menu pops up, allowing you to either bring the card to the front or sending it behind others to layer your cards. Within this same window, you will also find the ability to duplicate or delete those cards. Don't be afraid to layer cards for added visual appeal to your reports.

Tip: You can use a shape outline image card layered behind another card to create a border as you see in the image on the right

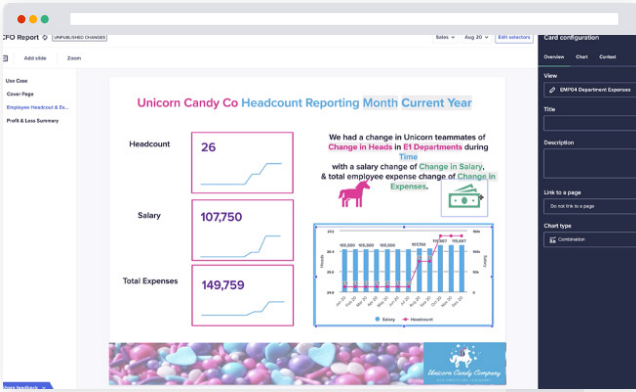


Add dynamic icons

Make dynamic icons pop

Draw attention to key metric by including dynamic images or icons.

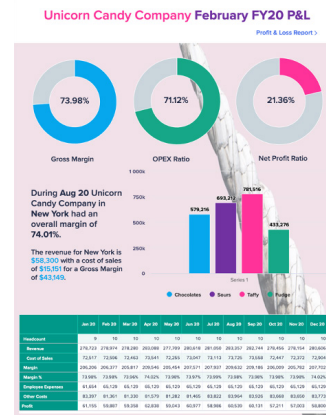
Dynamic images are similar to Boolean in that a formula will drive the expected behavior. These modules can include the same page selectors as the rest of the slide, such as time, versions, or lists, which makes these image cards truly dynamic. In the example on the left, we used a simple if-then-else statement to dictate whether the unicorn icon is present on the page, which signals a headcount change for a certain period within a department. Putting it all together, the dynamic narrative, dynamic icons, and the layered cards all help the target audience home in on what is important on the slide.



Add and customize chart cards

Customize various elements of your chart cards

Additional formatting options will be available based on the chart type you select in the chart configuration menu. You can customize the axis, labels, and your data in slightly different ways depending on the chart type chosen. Try different configurations to see what works best with your layout and background.

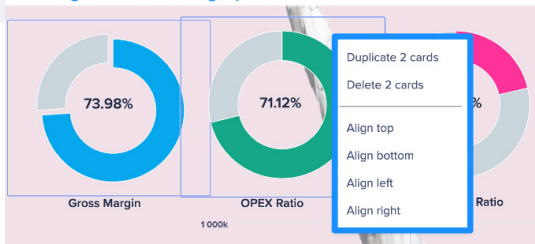


Duplicate and align cards

Duplicate and align cards to reuse elements efficiently

To accelerate your build, leverage the duplicate and align cards menu. You will find the different layout options such as duplicate, delete, or align if you right-click on your card(s). For cards that will include similar formatting, filters, and other selections, you can duplicate the original card for quick modifications. To align cards, click on one card, hold the command or control button, click on another card until all are selected, and use your align options. You can also right-click and drag your cursor across the slide to select a whole section of cards.

Quick edit/align multiple cards - select multiple cards and right click to bring up the menu

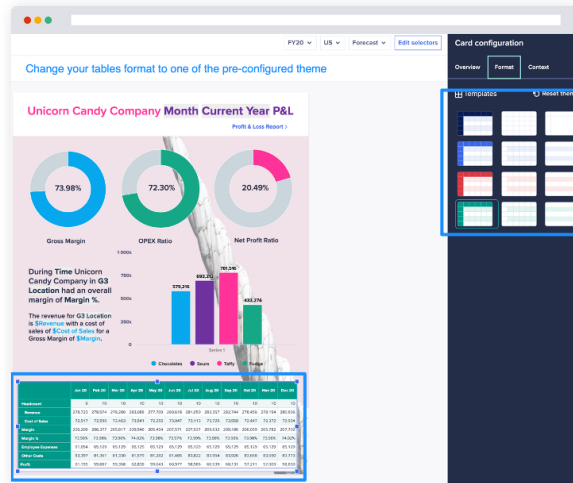


Add and format your table cards

Use pre-canned themes to format table cards

In Management Reporting, you will find table cards, which are slightly different from the grid cards in the other page types

The new feature for table cards is the ability to select from a set of pre-configured format options within the card configuration menu.



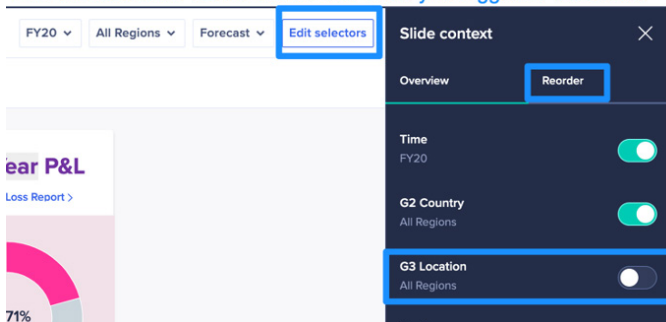
Edit page selectors

Additional options to edit page selectors

Management Reporting has additional options for editing your page selectors.

Navigate to the edit selectors options at the top right of the screen. You can toggle off any page selector, but it will default to the selection that is showing on the configuration panel. You can also reorder your page selectors in a sequence that makes sense to your audience.

Edit Selectors to include or reorder your context selectors
Your last selection will be the default when you toggle off a selector

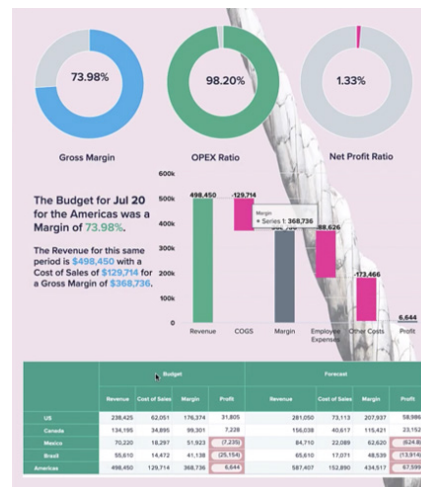


Display and distribution options

Publish, display and distribute

Once your report pages are finalized and published, you can print them to PDF to distribute to your team or present them live during meetings.

During your presentation, navigate between slides using your keyboard arrow keys. Just like in the other pages of Anaplan UX, when you click on charts and tables, your slides dynamically sync based on context.



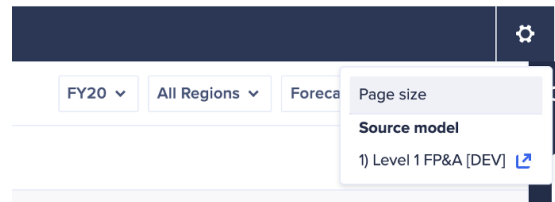
Additional report page settings

Page options

Choose your page size to match your ideal layout.

Define the size of your page via the top right setting icon. The page size will apply to all slides.

Pick the page size - it will apply to the whole report



Slide layout options

Slide formatting options include orientation and background color, which you can find in the slide options ribbon.

For your slide orientation, you can choose landscape or portrait for each slide. You can also mix and match your background color per slide.

Note: Background color always appears behind all the elements.

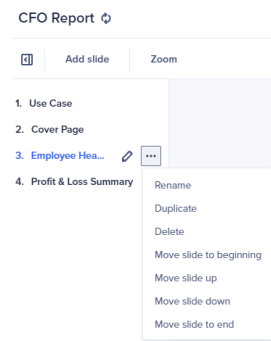
Note: Slides will all print to PDF as portrait.

Pick a background color, page orientation (print to PDF comes out in portrait only), or zoom for fine-grain adjustments



Additional slide options

Select the ellipses next to the slide names and a new menu appears that allows you to rename, duplicate, delete, or change the order of the slide.



For more information about Management Reporting pages, please refer to [Anapedia](#) or [Anaplan Community](#) for best practices and tips and tricks.

About Anaplan

Anaplan (NYSE: PLAN) is a transformative way to see, plan, and run your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Connecting strategy and plans to collaborative execution across your organization is required to move business FORWARD today. Based in San Francisco, we have 20 offices globally, 175 partners, and more than 1,750 customers worldwide. **To learn more, visit anaplan.com**