Anaplan New UX

Resource Document for Anaplan Customers

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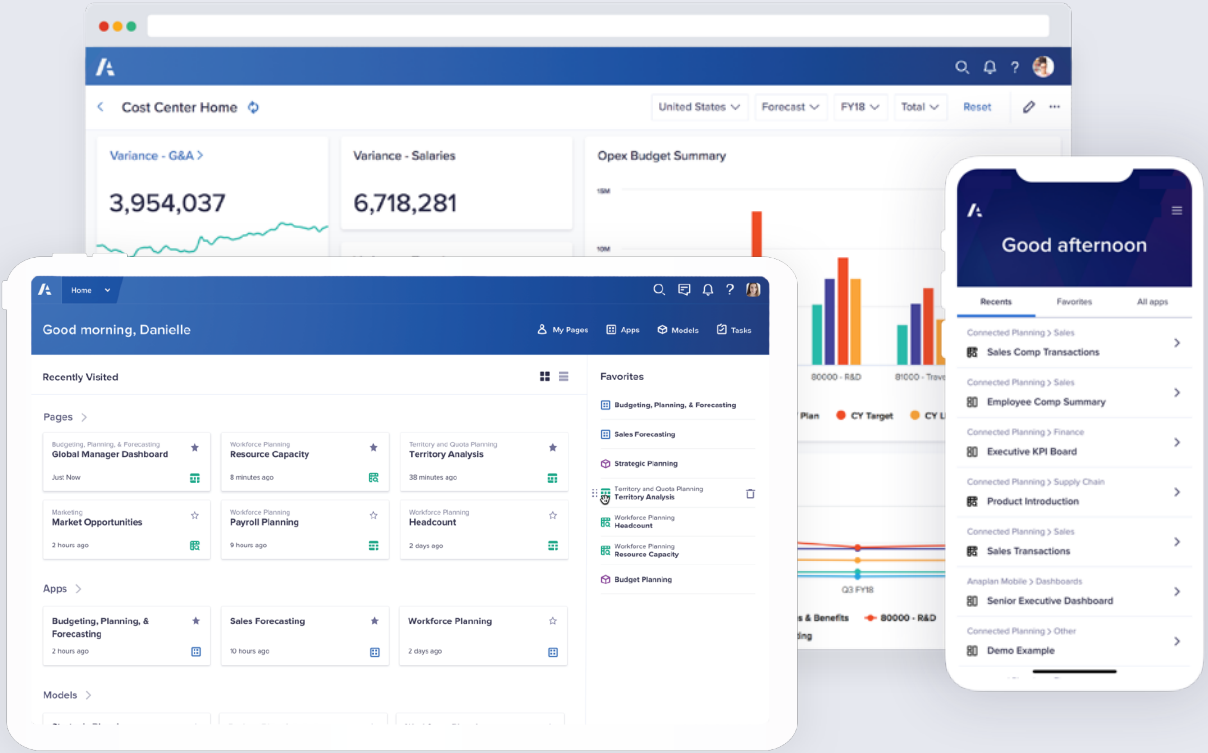
What's covered

- About the New UX
  - Features
  - Structure
  - Page Types
  - Navigation
- Best Practices for Design
- Best Practices for Cards
- Best Practices for Mobile
- Getting Started & Onboarding

What is the New UX?

Components of the New UX



User Interface

Native mobile app

Collaboration

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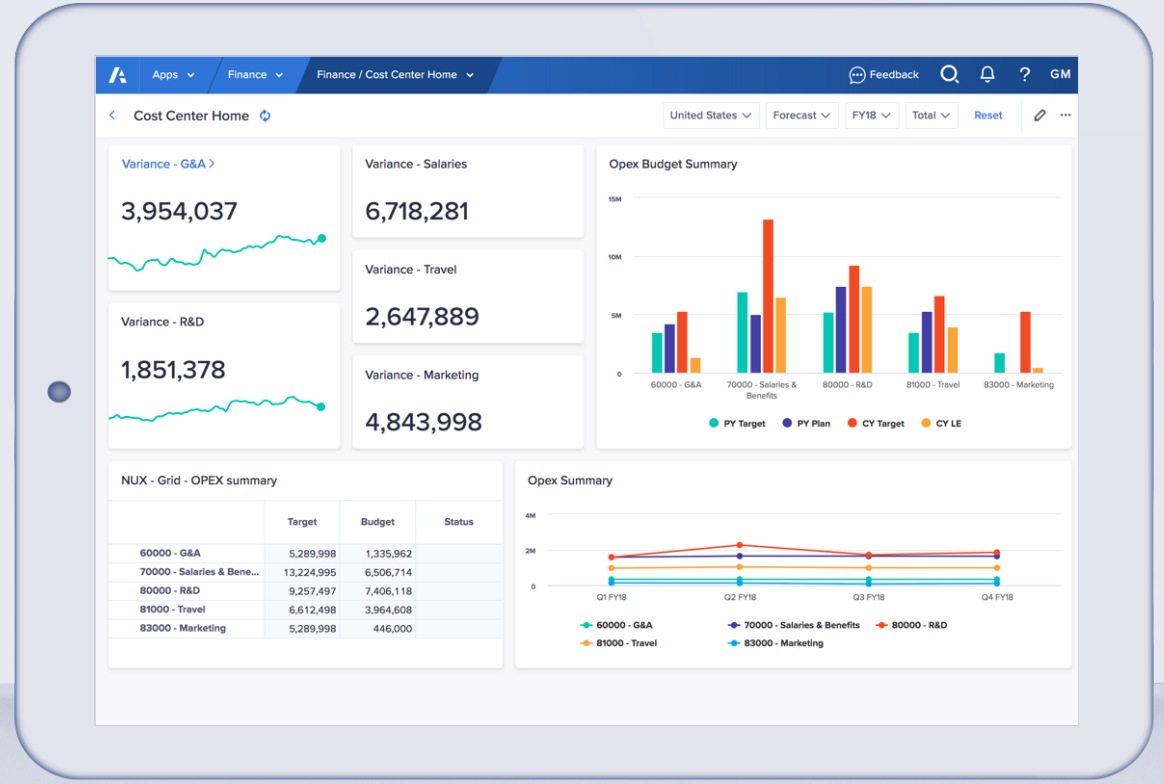
The New UX

- **A new experience layer**
- Inviting interface
- Personalized for your users
- **Apps** and **pages**
- Easy for builders and end users
- Access from any device
- Designed to encourage best practices
- A foundation for further capabilities



Tour of the New UX

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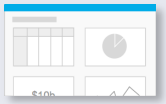
NUX Feature Definitions

Home
Personalized, surfaces your most important work

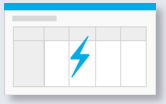
Forms
Makes date input simple and intuitive

Apps
A collection of pages focused on a business area or process
Model Agnostic

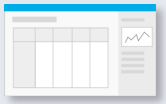
Global Navigation & Search
Efficient and fast navigation



Boards
View key metrics & KPIs
Interactive & responsive layout

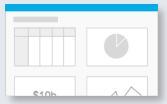


View Designer
New interface for creating data views (pivot, filter, sort, select items)



Worksheets
Optimised for large datasets
Insight panel

Mobile
Access Anaplan on-the-go



Cards
KPI's, Sparklines, Charts, Images, Actions, Form fields

My Pages
End users are enabled to create and customize pages they can save and share

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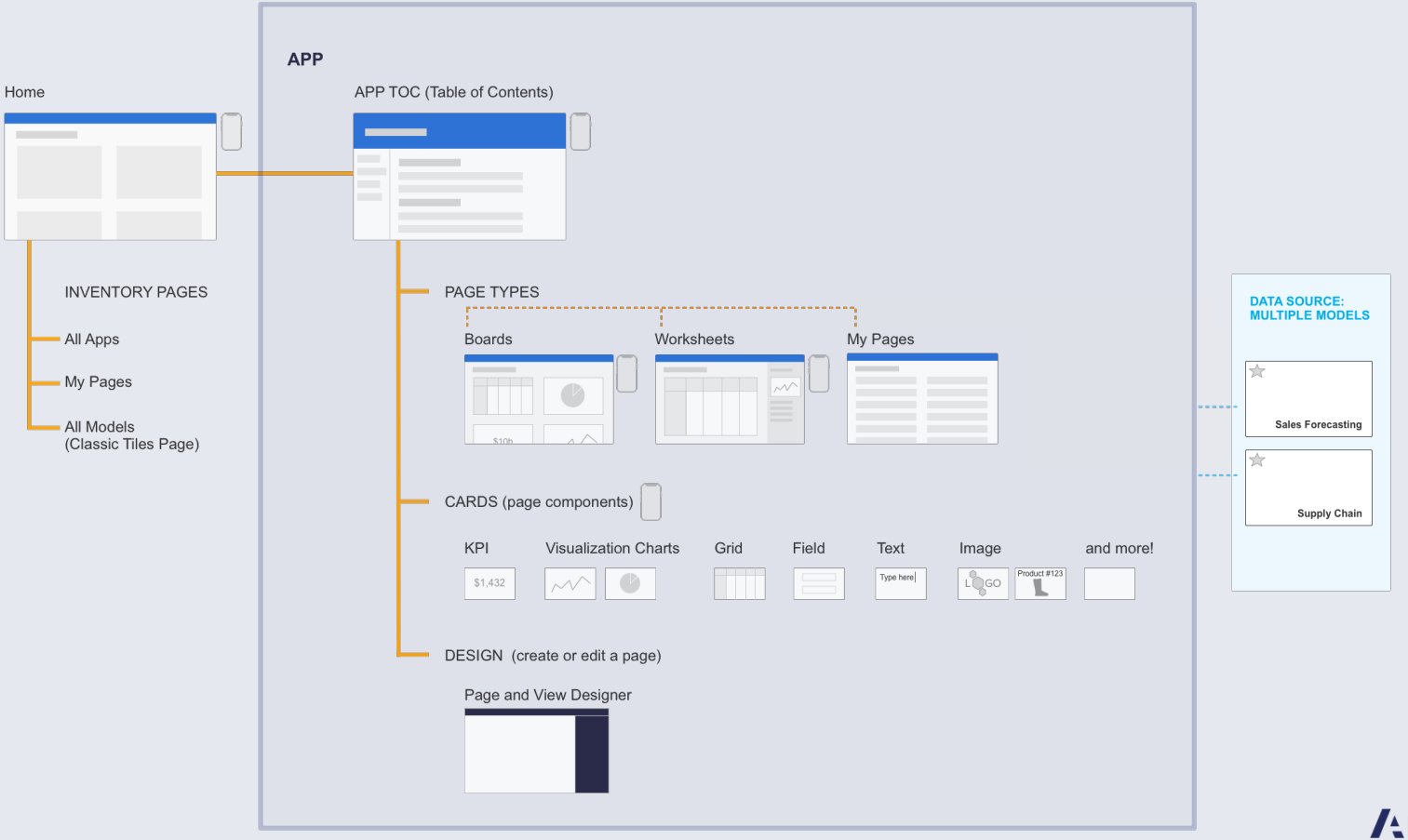
New UX Structure



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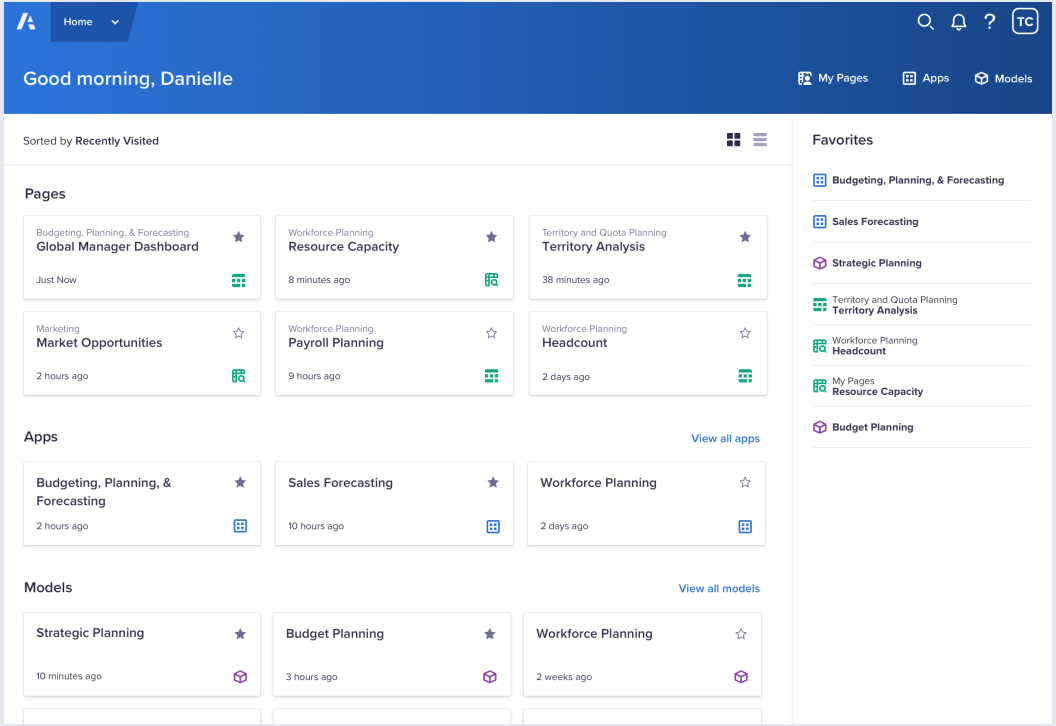
Home

- Replaces Launchpad/Tiles as landing page
- Quick access to your most relevant content
- Supports NUX and Classic
  - Apps
  - Pages
  - Models
  - Favorites
  - My pages

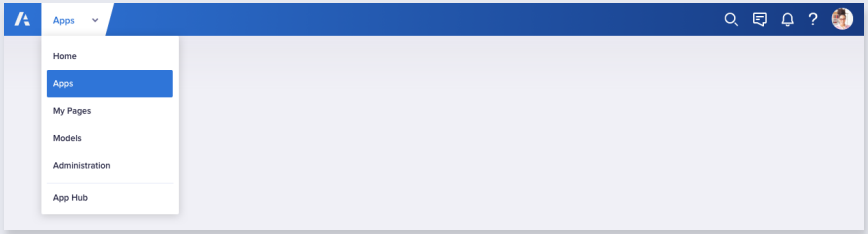


Introducing Breadcrumb Navigation

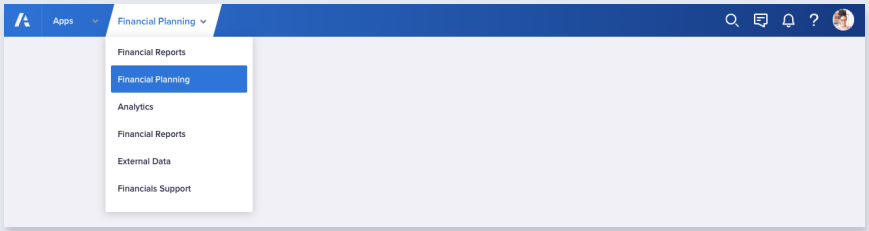
The new navigation makes it easy to find what you need

- First menu: main menu to access all inventory pages
- Second menu: title of current App
  - Other Apps are shown in the dropdown
- Third menu: Pages
  - Organized by Table of Contents categories

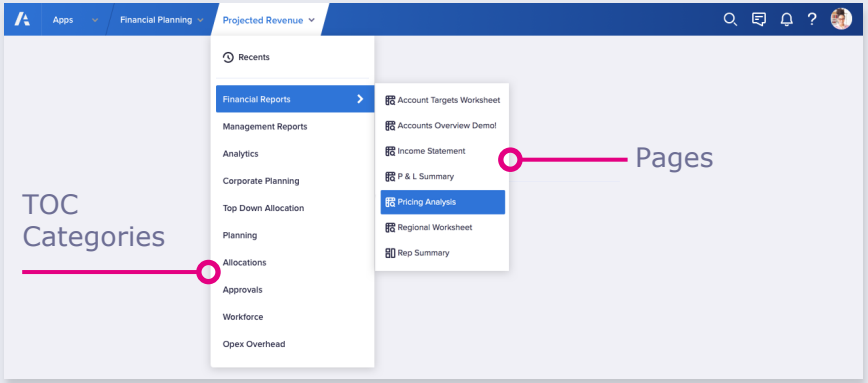
First menu: Inventory pages



Second menu: all apps



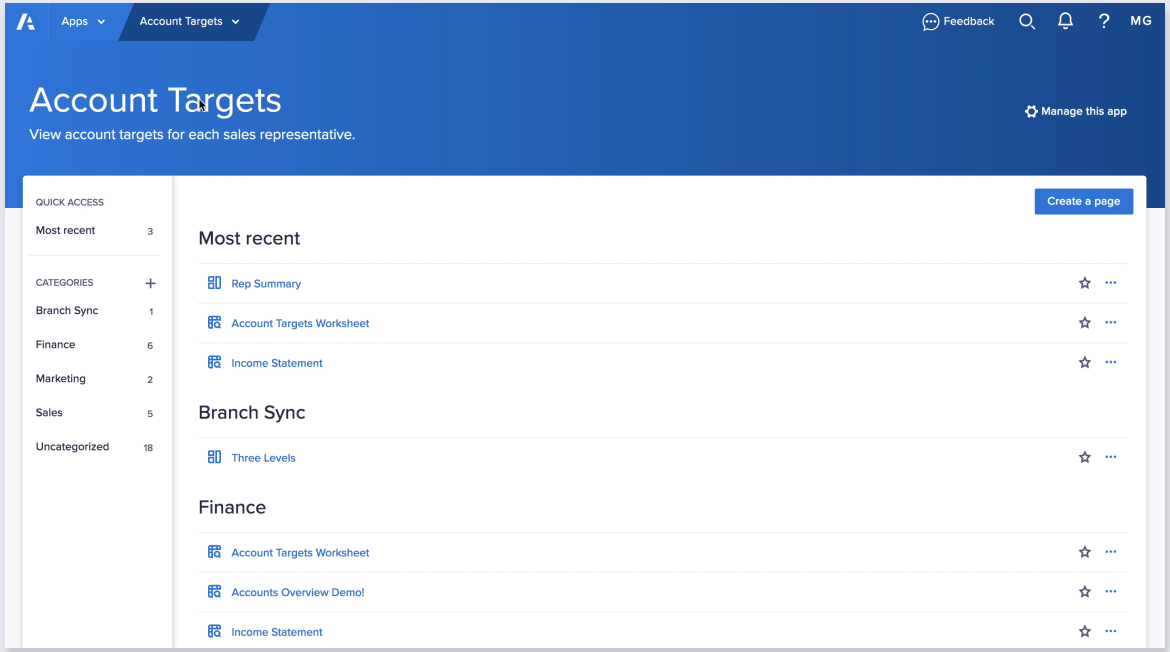
Third menu: TOC categories and their pages



Apps

An app is a collection of pages around a business process

- App Table of Contents (TOC)
- Organize pages via “Categories”
  - Group like pages together, or label categories by role
- An app can pull data from different models (one model per page)



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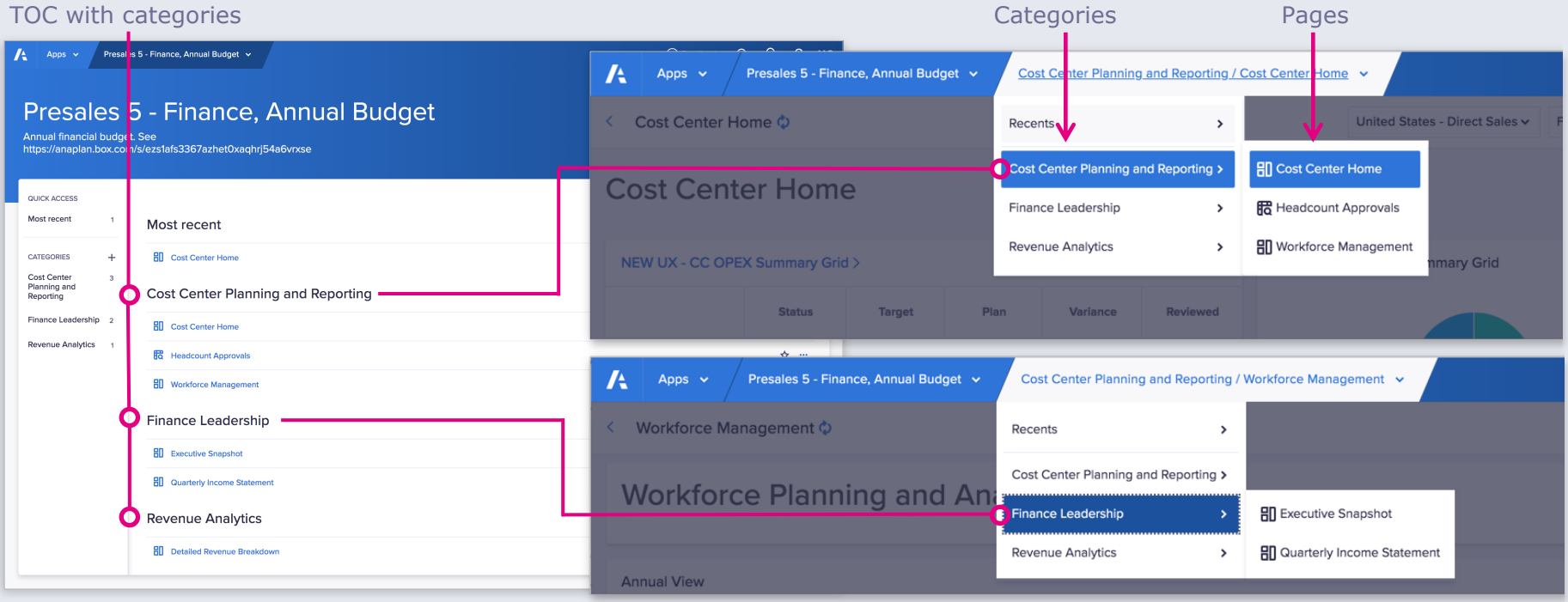
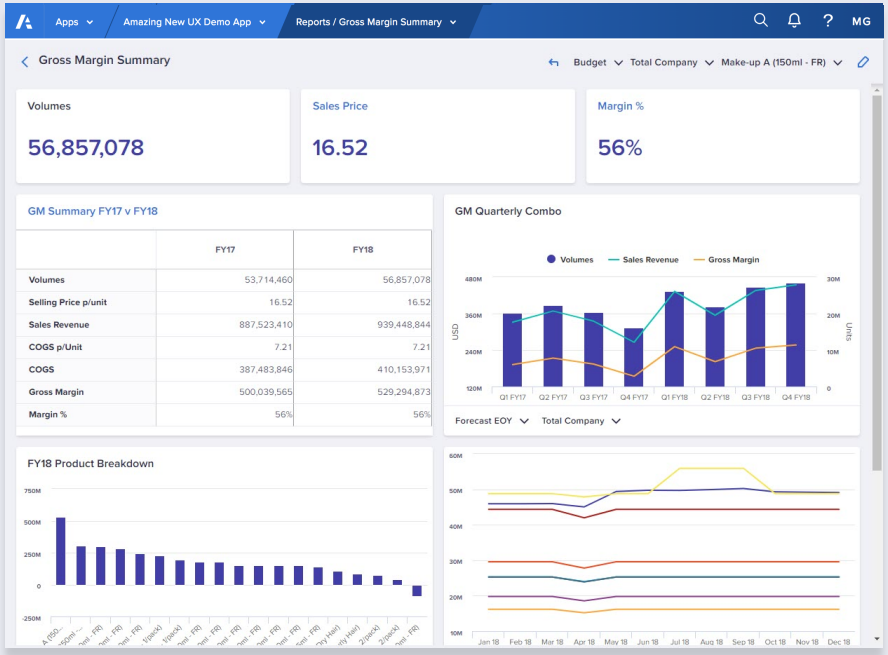
App Navigation

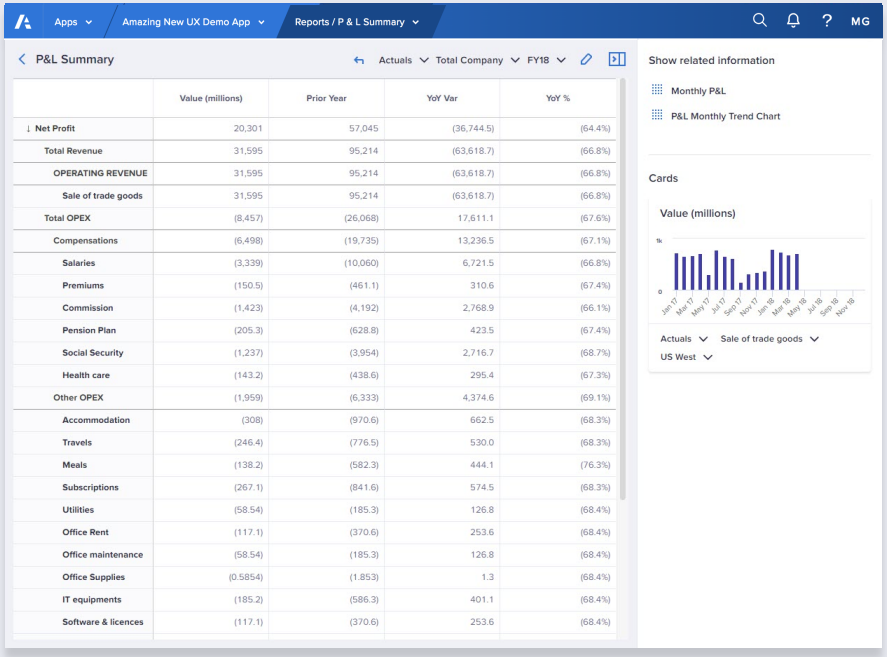
Use Breadcrumbs to navigate through an app

- The order of pages in the breadcrumbs reflect the order in the Table of Contents
- Via breadcrumbs, any page can be accessed from any other page



Pages





Board
"Overview"

Worksheet
"Detail"

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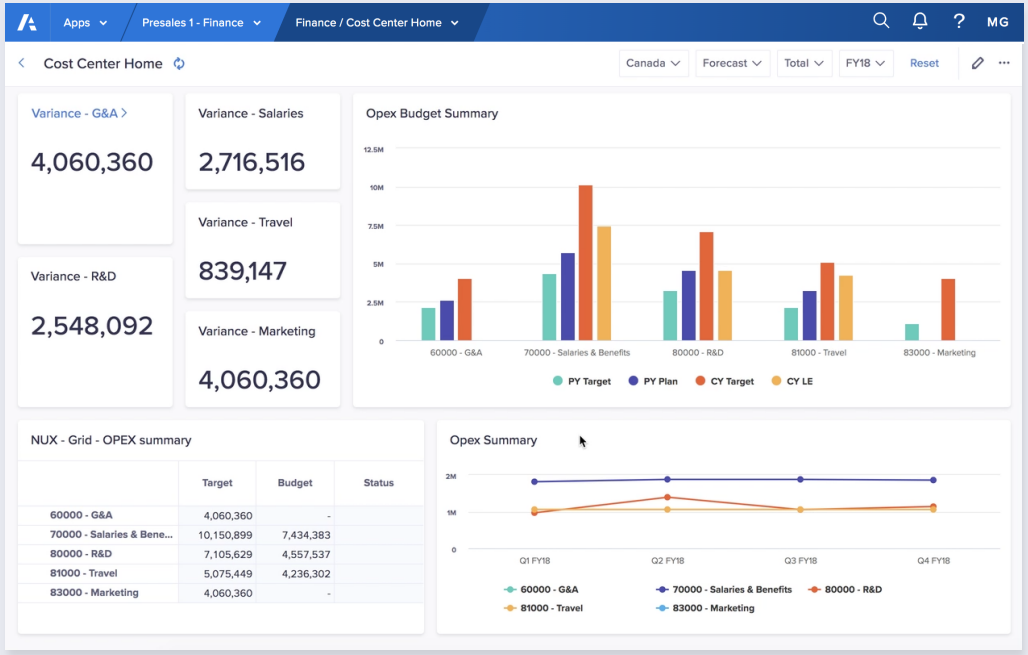
Boards

Use boards to track key metrics for an organization, department or business process

- Provide key metrics at-a-glance
- Can serve as a home page for your app
- Use editable grids and fields for changing drivers and assumptions
- Create links from cards to underlying data on other pages

Summary Board

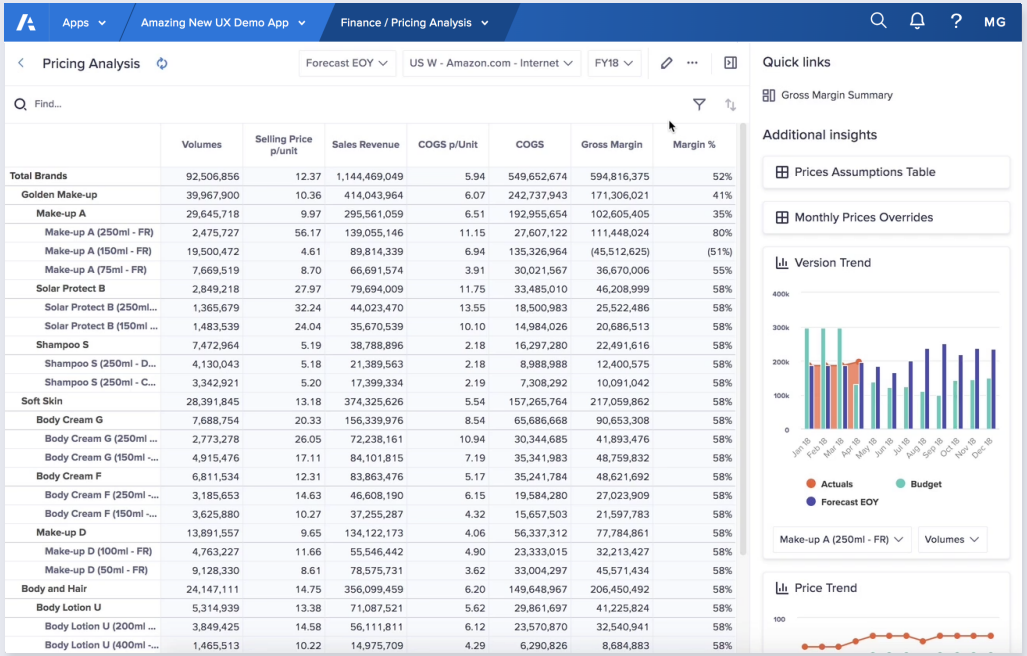


Worksheets

Use worksheets for detailed analysis and editing detail data

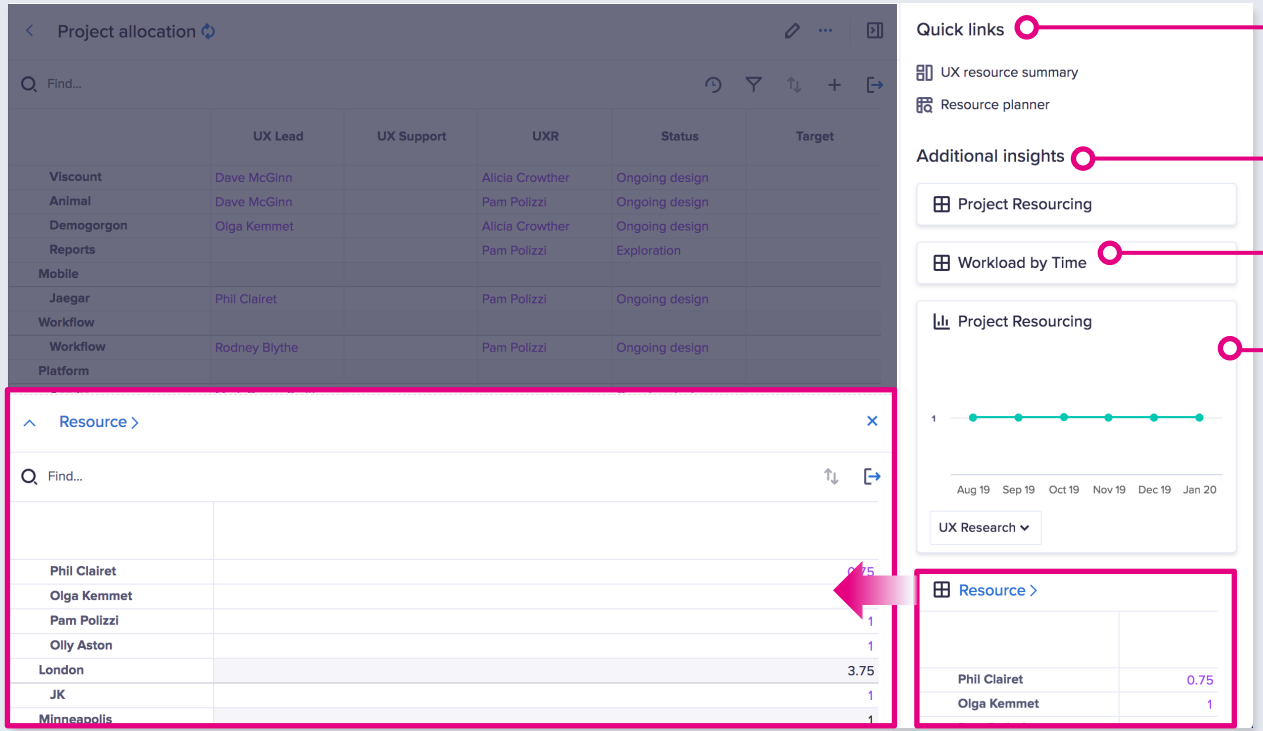
- Perfect for displaying big grids of data
- Use the **Insights panel** to show related data and impact of changes
- Add editable grids or fields at the top of the Insights panel for changing drivers and assumptions

Pricing Analysis Worksheet



Insights Panel in detail

The insight panel provides one place for related and supporting items



Links to related pages or pages with supporting data

Anything that supports the data in the main grid should be placed here

- Can be drivers and assumptions
- If the data on this card is too dense for the insights panel only use the title card
- Visual card

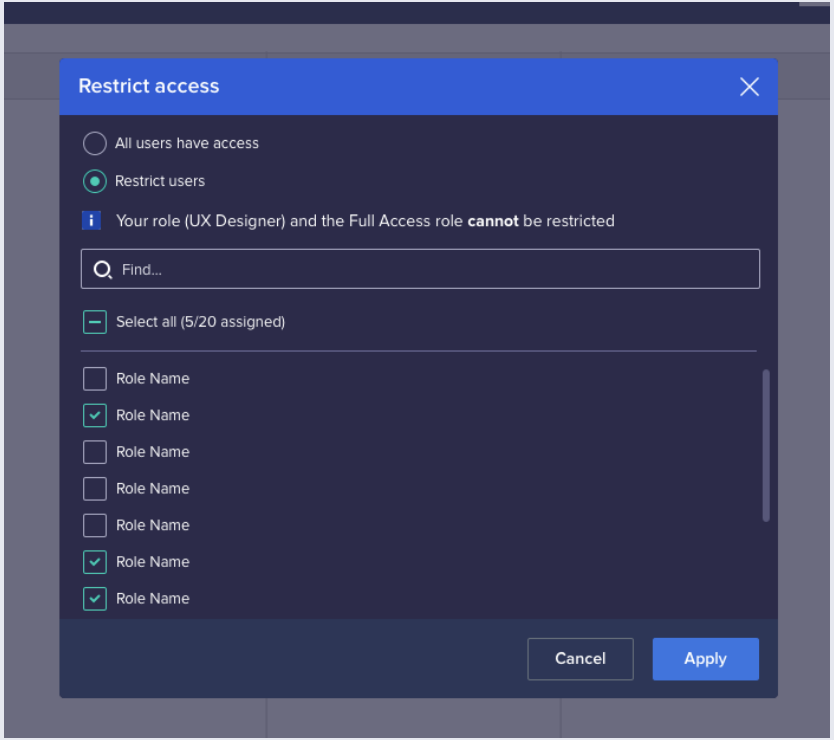
Clicking a card will bring it into the main data area as a secondary item

I was able to turn some 25 classic dashboards into 7 pages in the NUX by leveraging the Additional Insights panel

-Fortune 500 technology company

Page Access Control

- All Data access driven from existing model roles
- Set Pages to “Restricted”
- Select Roles to grant access to the page
- No restrictions by default



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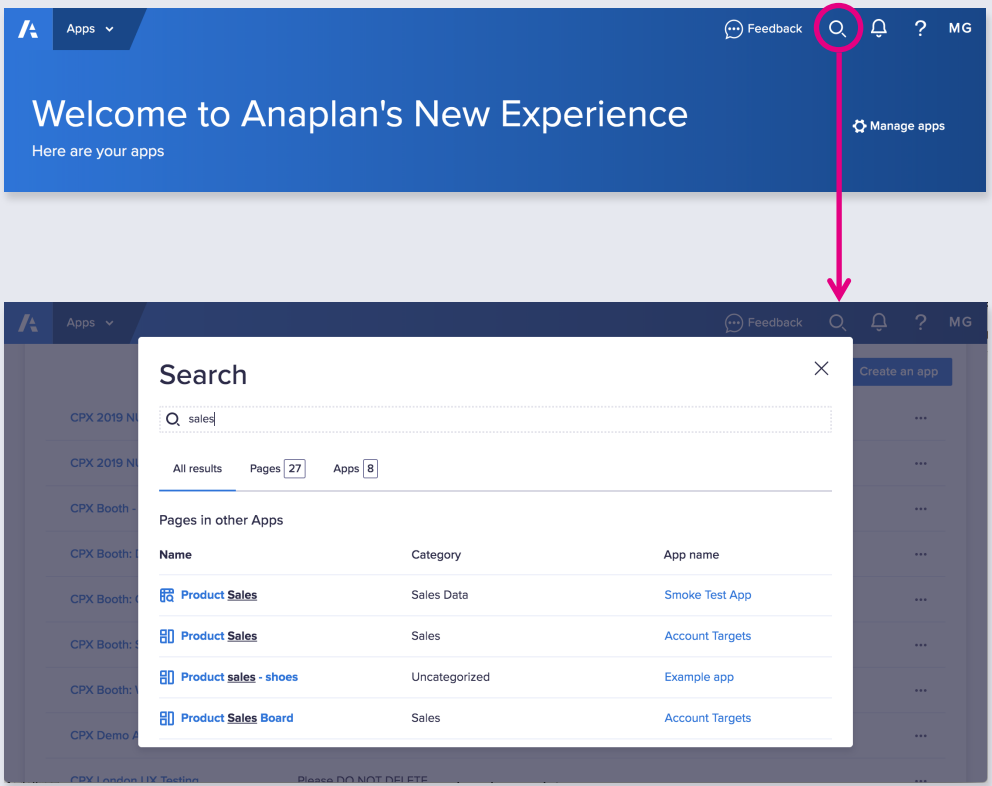
New Search

New Search in the navigation enables search from anywhere in the New UX

Search for all:

- Apps
- Boards
- Worksheets

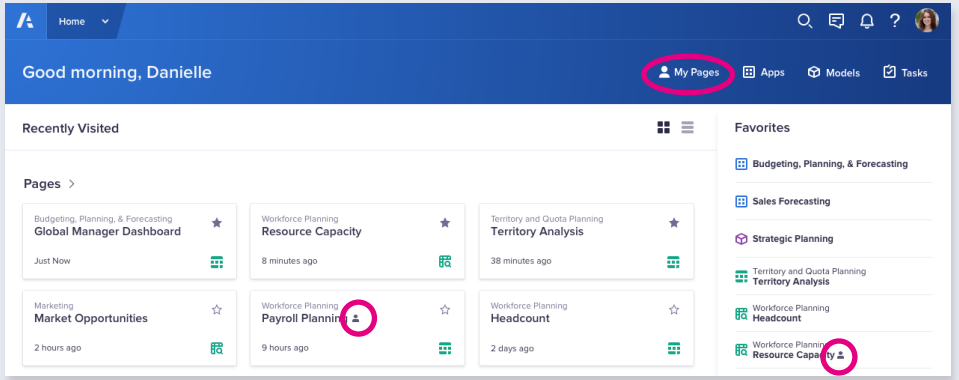


My Pages

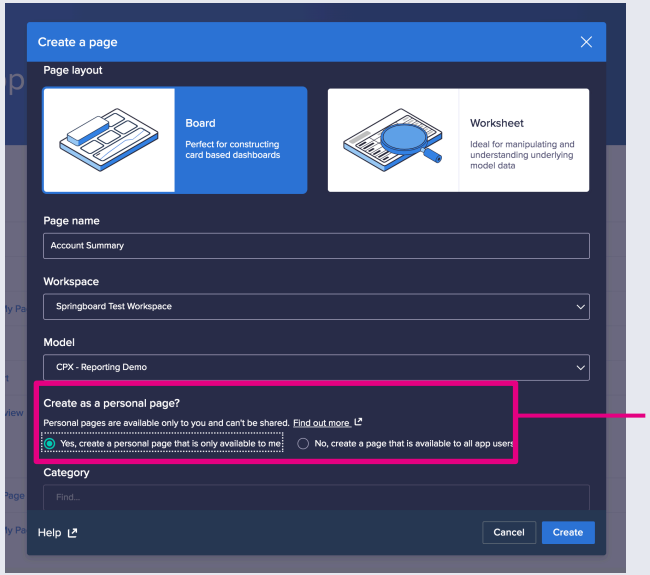
End Users

Allow end users to create their own private, personal pages

- Create from existing page or from scratch
- As part of an app or outside
- Only accessible to the creator – currently, not shareable
- On by default – disable at model level
- Create as many pages they want
- Are a copy, so changes to the original won't impact them



Access "my pages" on home. Notice a person icon next to the title to represent a "my page"



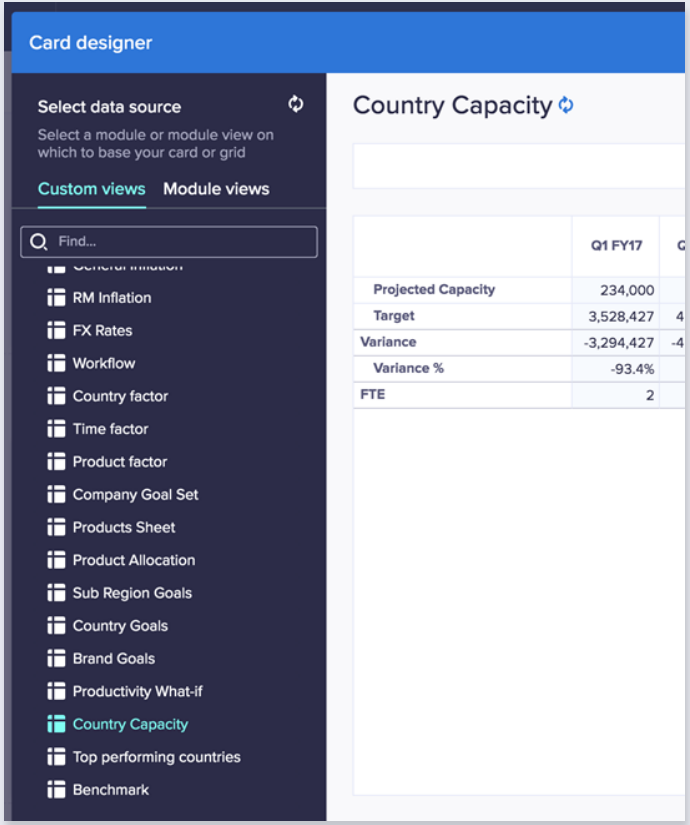
Check settings

View Designer

Custom View vs Module View

- If you have Module Views for all existing Dashboard elements then simply point your Cards at the Module Views on a page.

- You can create Custom Views in the New UX direct from Modules. All pivots, filters, sorts and selections handled in New UX.



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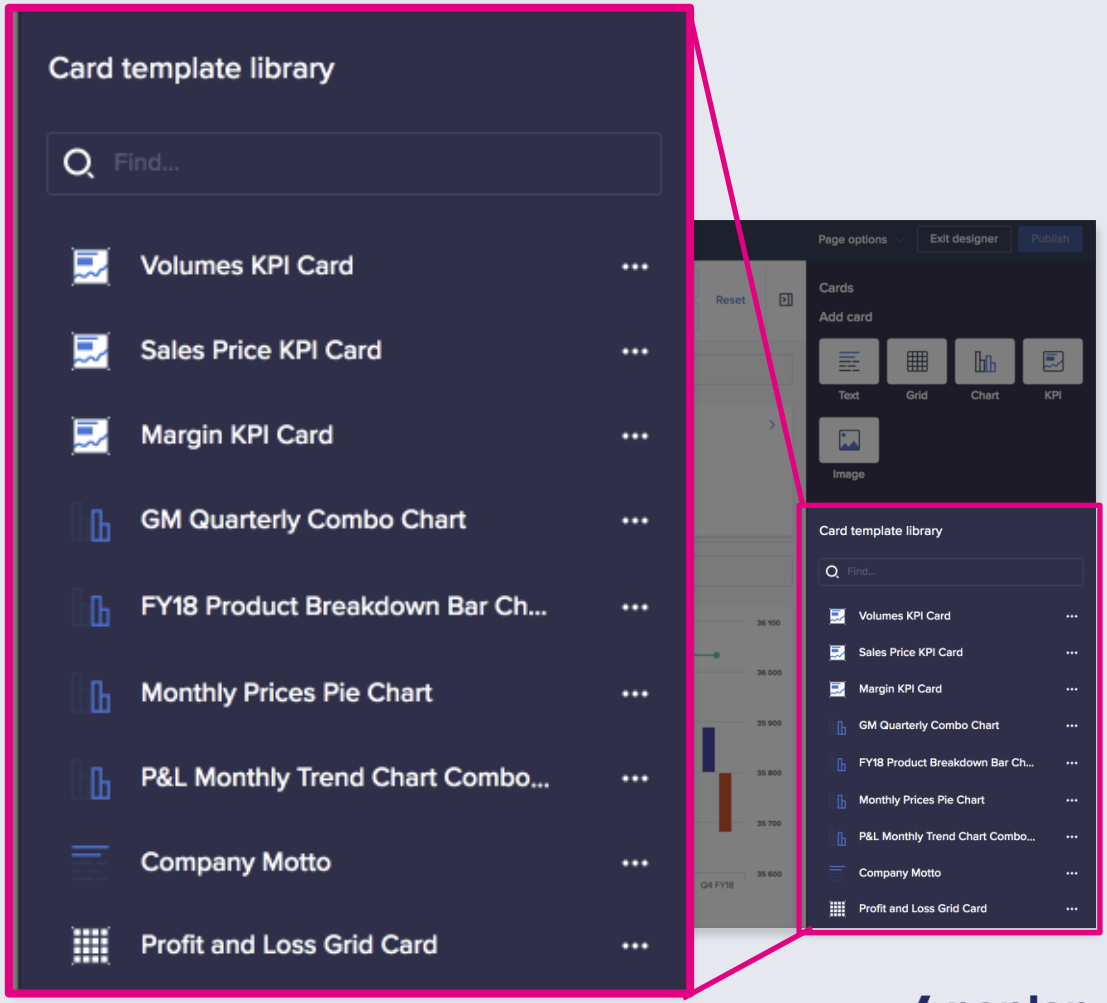
Card Templates

- Encourage consistency and accelerate build process
- Create one KPI Card template then reuse to select the different line items it represents
- Used by end users to quickly create Boards based on library of cards provided by Model Builder



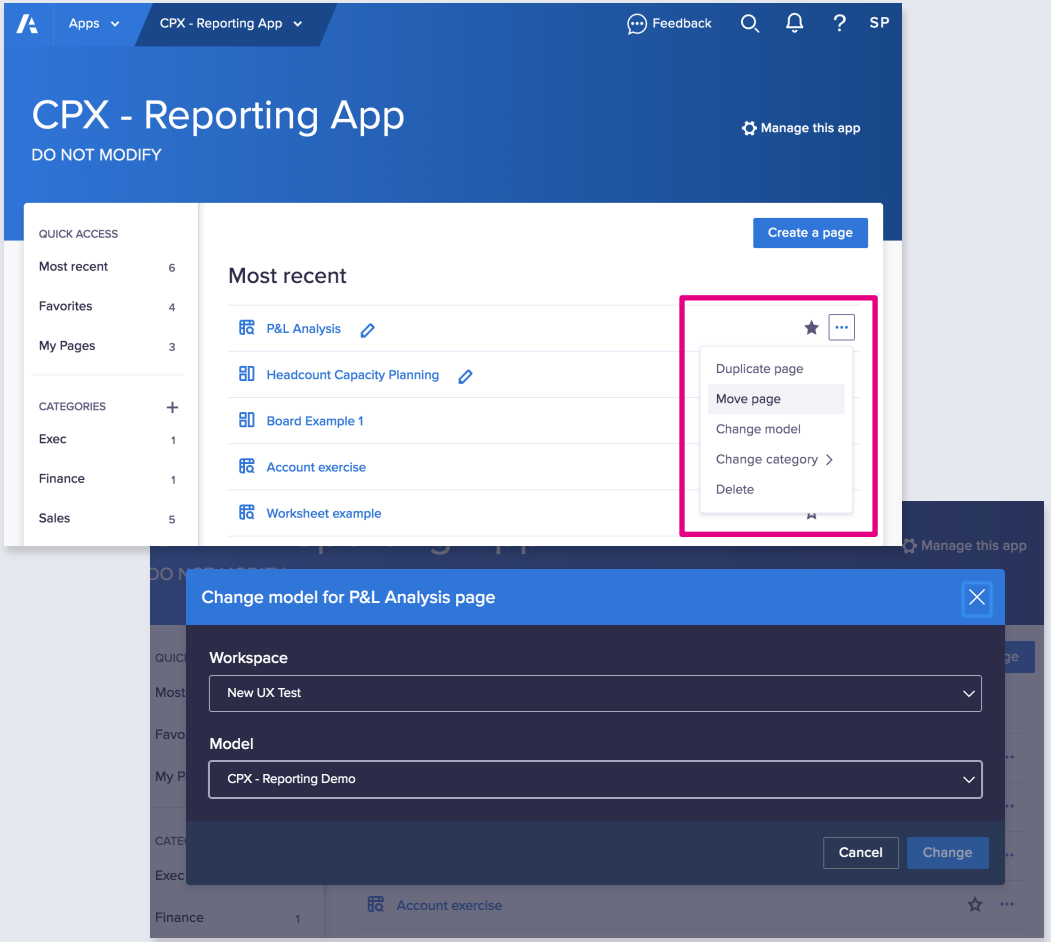
ALM Change management

Page Management

- Duplicate page
- Move Page
- Change Model

App Management

- Copy App



Learn more:

Anapedia

https://help.anaplan.com/anapedia/Content/New_User_Experience/Overview.htm

Learning Center E-Course

https://learning.anaplan.com/course/view.php?id=949

Design Best Practices

Know your users

Work with your users to understand their needs to help you to create the best experience

- Understand your users and their needs
- Develop personas according to roles
- Speak their language
- Build apps and pages aimed at personas
- Run past users during build to ensure you’re on the right track
- Observe them using the app in order to identify usability issues

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Developing Personas

Personas are fictional characters based on your user roles. Creating personas will help you understand your users.

Considerations:

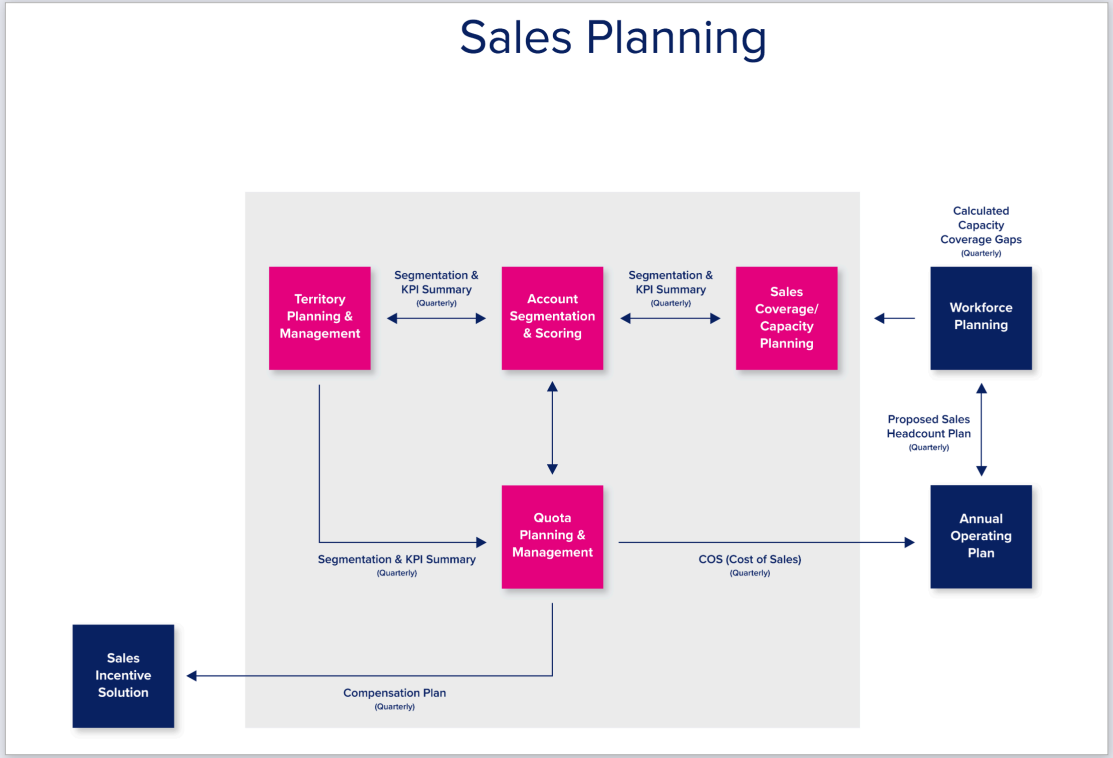
- Who are your users?
- What are their roles?
- What are they trying to do?
- How would they best do this in Anaplan?
- How often are they in Anaplan?
- How can I make this easy for them?
- Do they use a tablet, desktop or mobile device for work?

Examples of Anaplan UX team's personas

Match with real-world scenarios

Speak the users' language, with words, phrases and concepts familiar to the user

- Consider the persona
- Consider business process outside of Anaplan
- In Anaplan follow real-world conventions
- Follow real-world process to decide which information to place where
- Keep a natural and logical order



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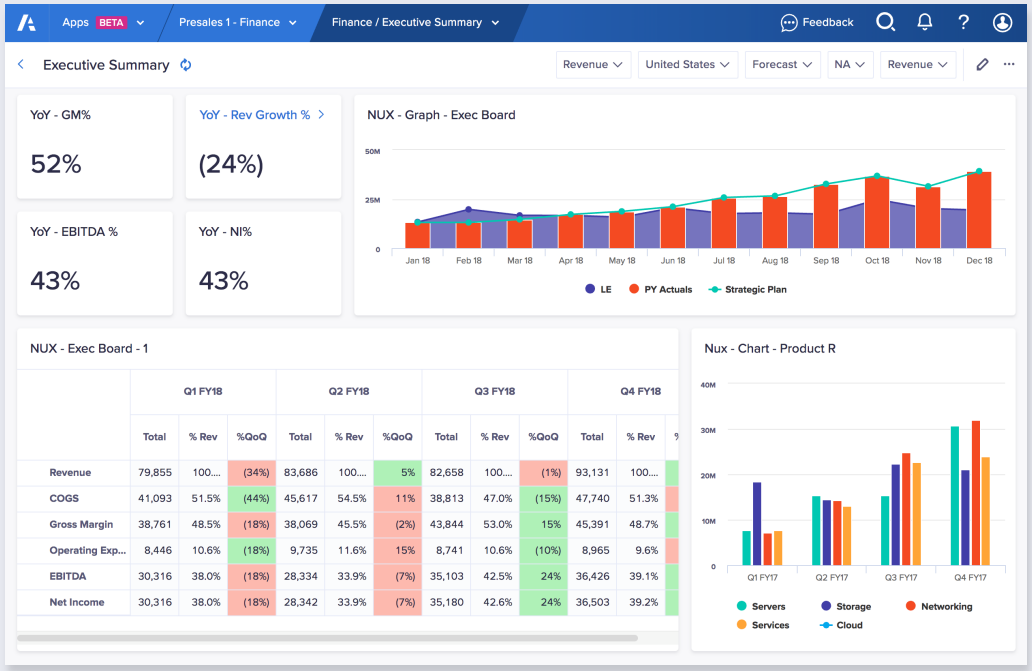
Prioritize by importance

Make the most important information prominent, such as key metrics

- Place key KPIs at the top
- Use summary boards to summarize metrics in a section or app
- Users can scroll or drilldown to explore in more detail

Executive Summary Board

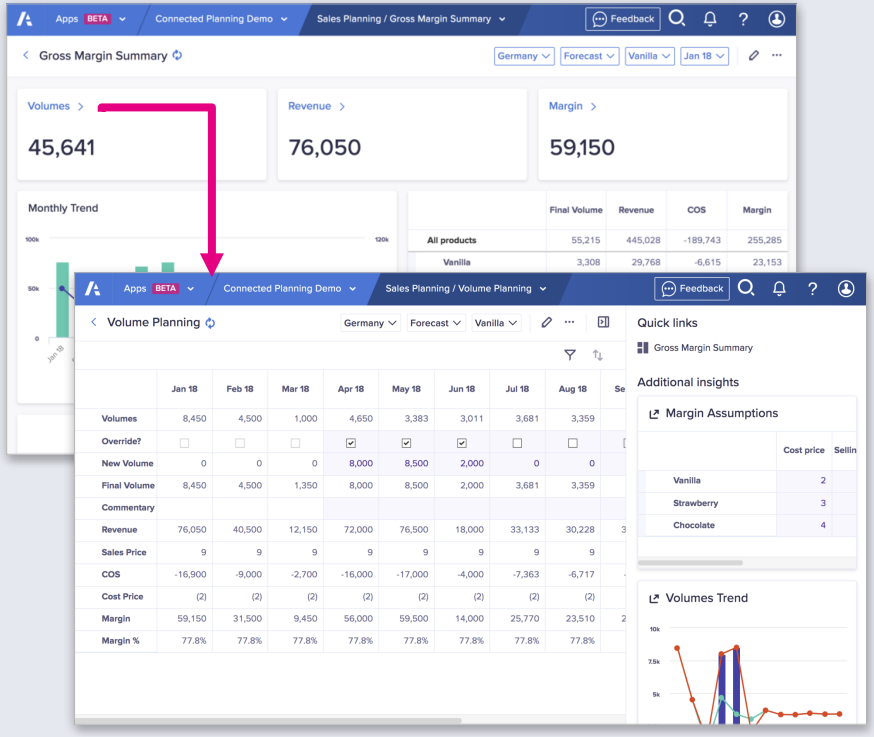


Progressive disclosure

Presenting data incrementally avoids overwhelming users

- Present data in digestible chunks
- Link summary data in cards to detail data in worksheets
- Put helpful “Quick links” in the insights panel
- Place useful items in “Additional Insights”

Board as a summary



Details on a worksheet

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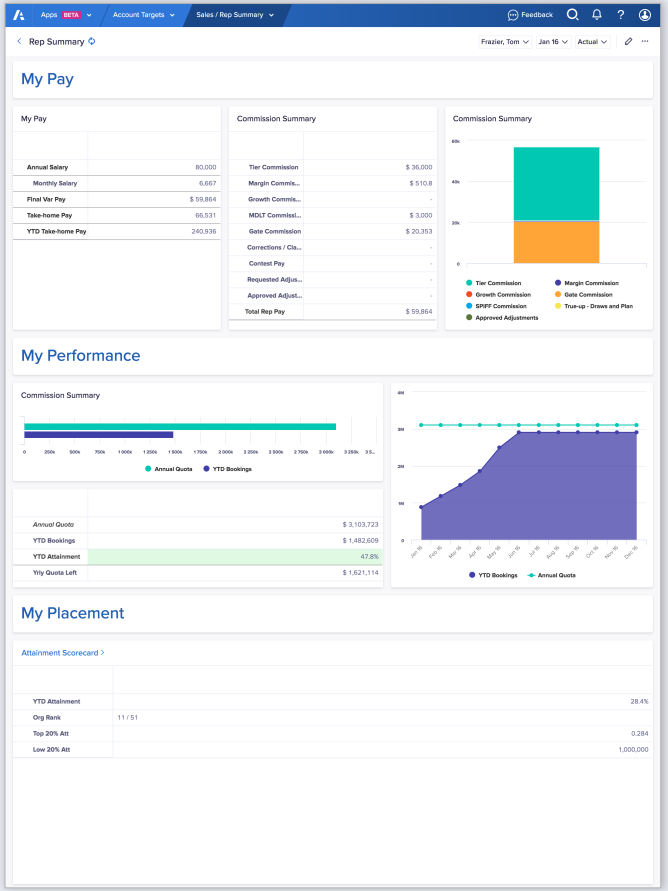
Smart grouping

Grouping helps the user to make sense of what they're seeing

- Group related data together in containers
- Use easy to understand categories
- Use text cards to provide headings if necessary

Group related content and give groups headings

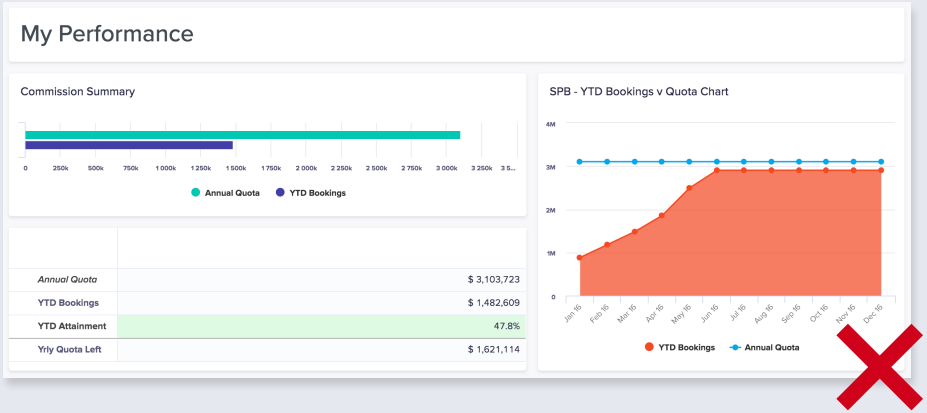


Consistency

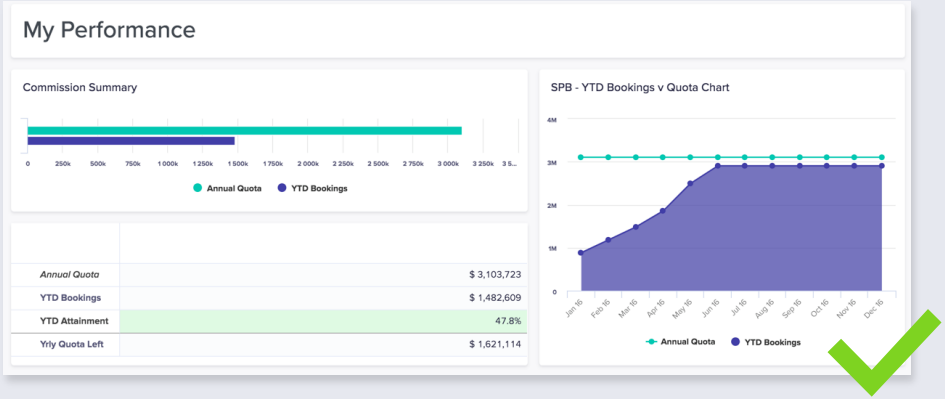
Consistent design e.g. terms, colors and layout makes the experience more predictable

- Keep links and target page names consistent to avoid confusion
- Follow consistent naming conventions
- Use consistent colors and order for metrics

Don't



Do



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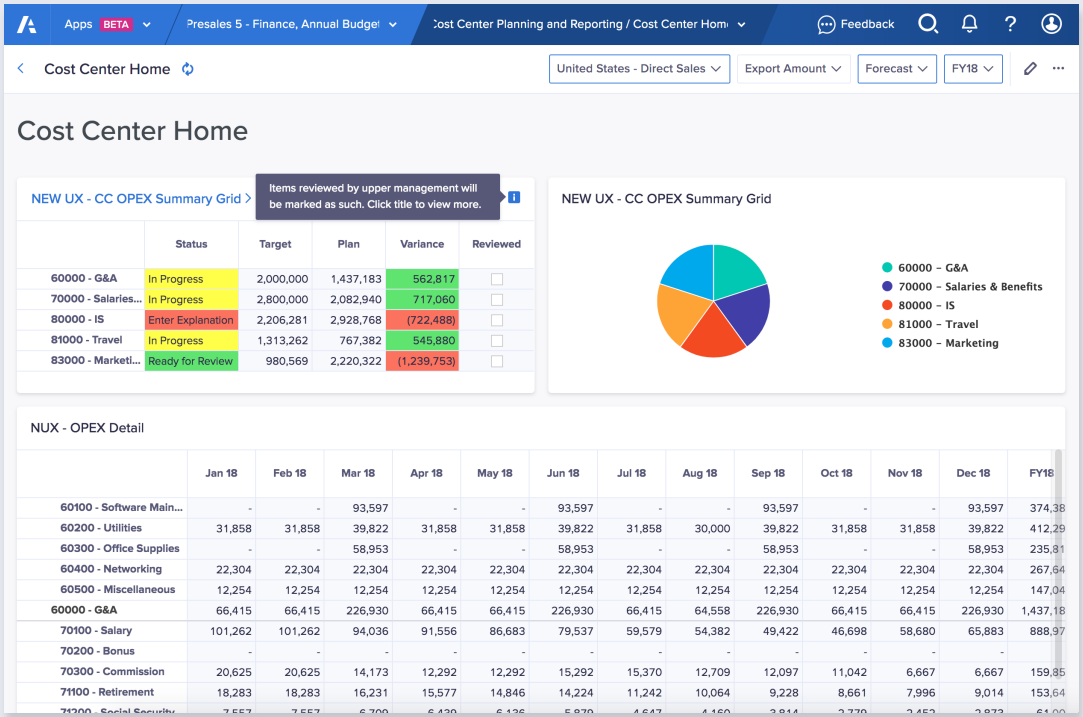
Help and guide

Provide hints to guide users on what to do next

- Use text and instructions where needed
  - Use text cards for pages intended for less frequent users
  - Use tool tips for frequent users
- Provide custom tooltips to help describe visualizations
- Don’t overwhelm with verbose language

Board with instructions



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Card Best Practices

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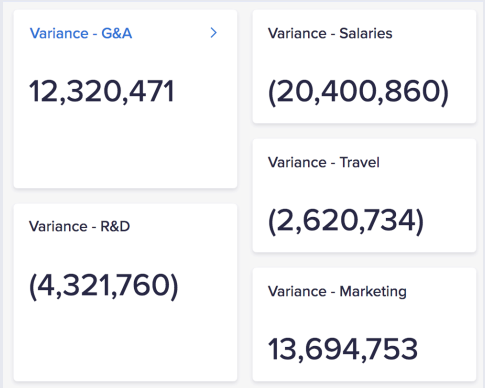
Card best practices

Grid

- Look up and/or edit specific values in a big data set
- Contain more than one unit of measure
- Compare specific values
- Consider progressive disclosure

KPIs



- Use for presenting single high-level figures e.g. revenue to date
- Place prominently for at-a-glance consumption

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Card best practices

Column & bar

- Compare large variations in values across different line or list items e.g. FY actuals vs forecast
- Show data at a point-in-time
- Columns can be useful for comparing items over time e.g. target vs plan by month
- Bars are good for ranking

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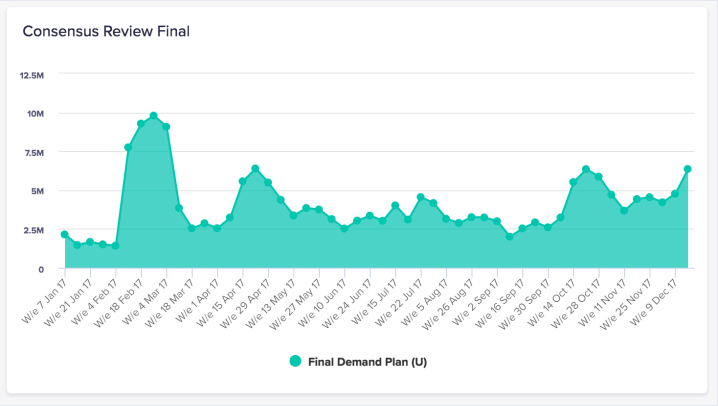
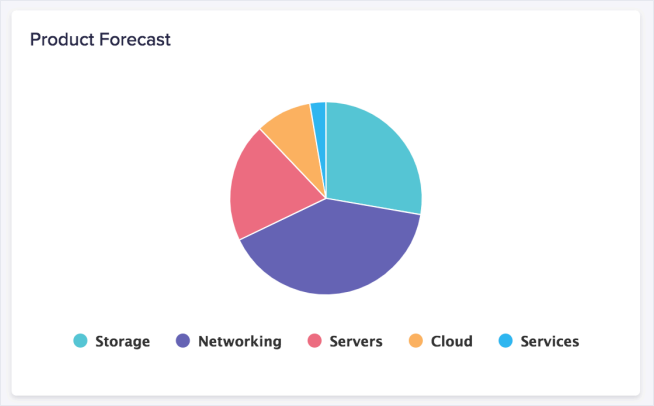
Card best practices

Line Chart



- Best for time-series relationships
- Easy to identify trends and patterns
- Useful for comparing small variations

Pie Chart



- Show part-to-whole relationships
- Not great for comparing values
- Use with caution ☺

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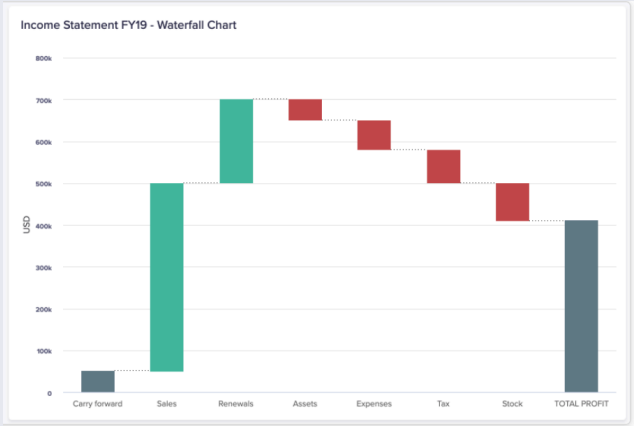
Card best practices

Combination Chart

- Most useful for following trends and identifying outliers
- Use to validate the relationship between two variables that have different magnitudes and scales of measurement but are related
- Multiple series and dual Y-axes

Waterfall Chart



- Best for showing the gradual transition in value of an item subject to increment or decrement
- Accumulation of line/list items to produce a total
- Option to suppress zeros on charts

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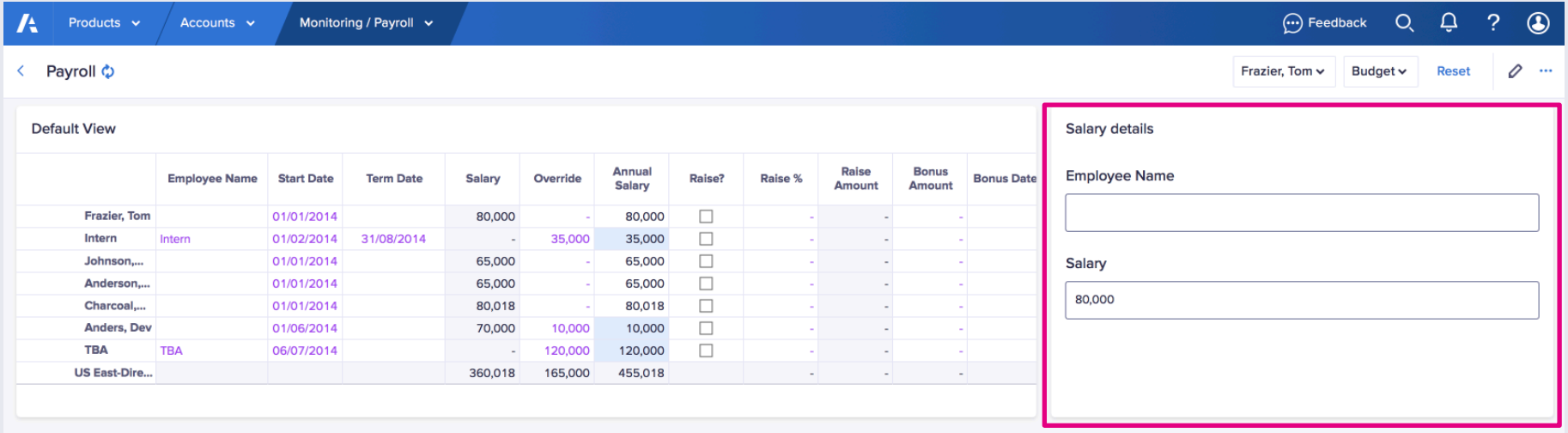
Field Card



- Use to focus the attention of users on selected fields
  - Linked to line items
  - Enable editing data
- Update in real-time
  - Good for forecasting, entering different values, dates, list items…

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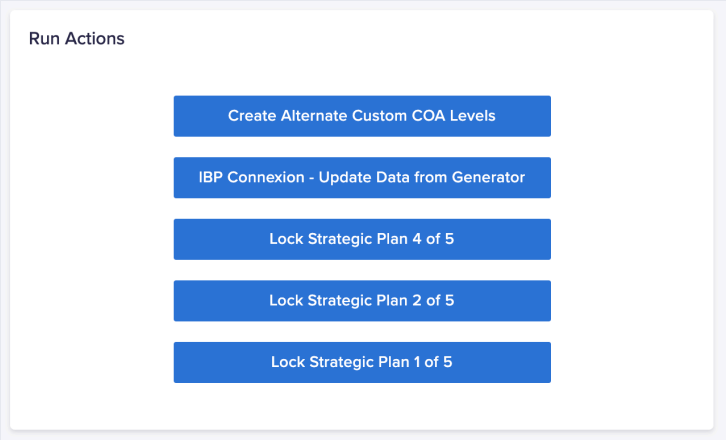
Action Card



- Call out specific import, export & processes on a page
- Can trigger a form for the user to create or add items to the model
- Enables users to follow a step by step flow to accomplish their task

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Learn more about cards:

https://help.anaplan.com/anapedia/Content/New_User_Experience/Build/Boards/Cards/Card-types.htm

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Best Practices for Mobile

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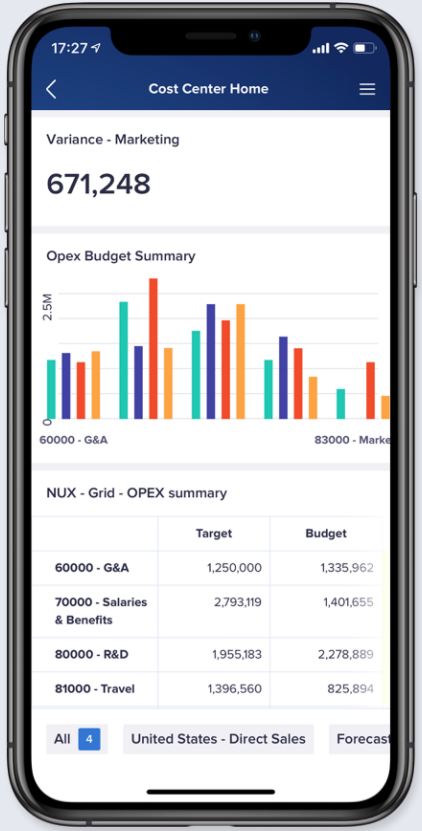
Mobile

If your users are likely to be using your app regularly on mobile, think about the mobile experience first

- Link cards to more detailed data to avoid overwhelming users
- Avoid displaying huge grids on boards
- On board pages, place text card headings across the entire page
- Use one page for web and mobile, to reduce duplication and maintenance



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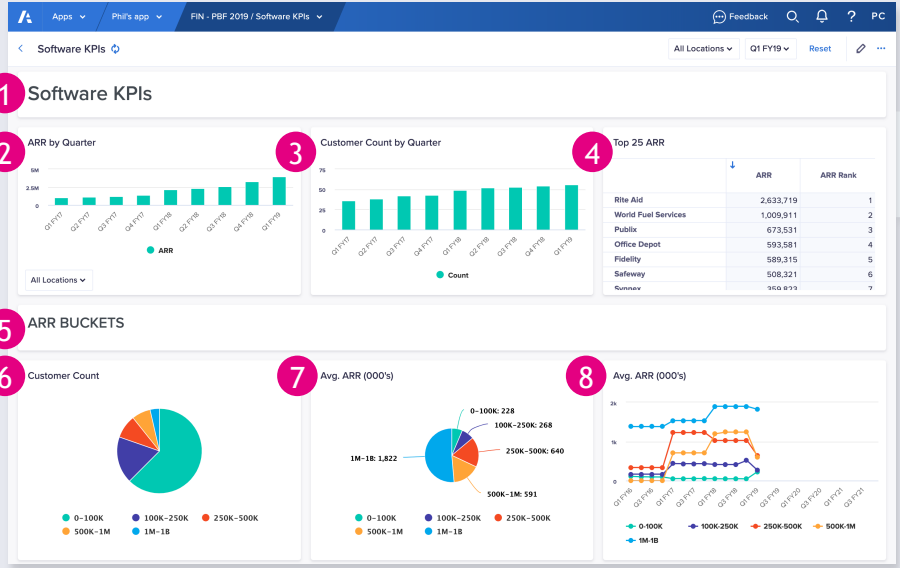
Desktop Board page to mobile

This diagram shows the display order of cards on a page when rendering on mobile



Learn more about Anaplan's mobile app:

https://help.anaplan.com/anapedia/Content/Mobile/Anaplan-mobile-app.htm

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Getting Started and Onboarding

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Onboarding Process

1. Strategize: Consider the roles and personas you have in Classic:
    - What's a common persona/role?
    - Any sub-process they struggle to complete or hit speedbumps on?
2. Choose 1-3 simple scenarios consisting of 2-5 dashboards (each):
    a) A simple sub-process
    b) A frequently used set of DBs (to help drive adoption and excitement)
    c) DBs that aren't working well in Classic
    d) Keep it simple to start
3. Re-envision – optimize for the new UX. Step back, wireframe. Consider:
    1. Long page? How can it be broken up?
    2. Large grids? Try a worksheet
    3. Overview? Charts? Try a board page
    4. App TOC – outline for your app
4. Page builder access – assign and check everyone has the right access
5. Get started building pages!

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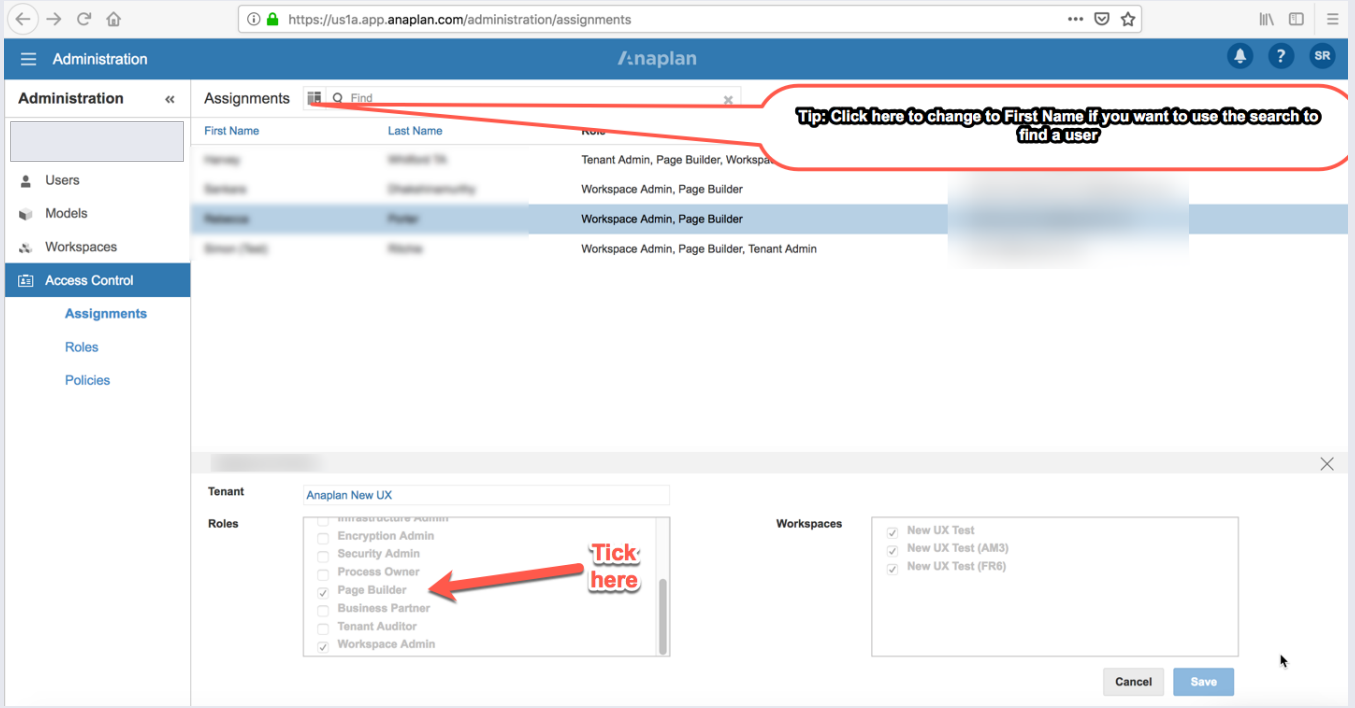
Page builder role

Must be a Page Builder to create an App page



You need a model builder license to be a page builder

Onboarding Process

STRATEGIZE

1

- Know your users
- Choose a good starting point

RE ENVISON

2

- Re-envision: wireframing 101
- Create an app outline via TOC

PAGE BUILD / PROTOTYPE

3

- Page Builder Role enabled
- Page Build

CONTINUE THE JOURNEY

4

- Create a solid feedback loop with users
- Provide feedback to the Anaplan team

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Strategize: Understand your users

1

Understand the problems and optimize for opportunity

Who are your users? What's a common role?

- Exec
- Sales Reps
- Analysts

How are they interacting with the New UX

- Frequently
- Irregularly
- Mobile

Where are they struggling?

- Specific pages
- Specific processes

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Strategize: Choose a starting point

1

Choose 1-3 simple scenarios consisting of 2-5 classic dashboards (each)

- A simple subprocess
- A frequently used set of DBs (to help drive adoption and excitement)
- DBs that aren’t working well in Classic
- **Keep it simple to start**

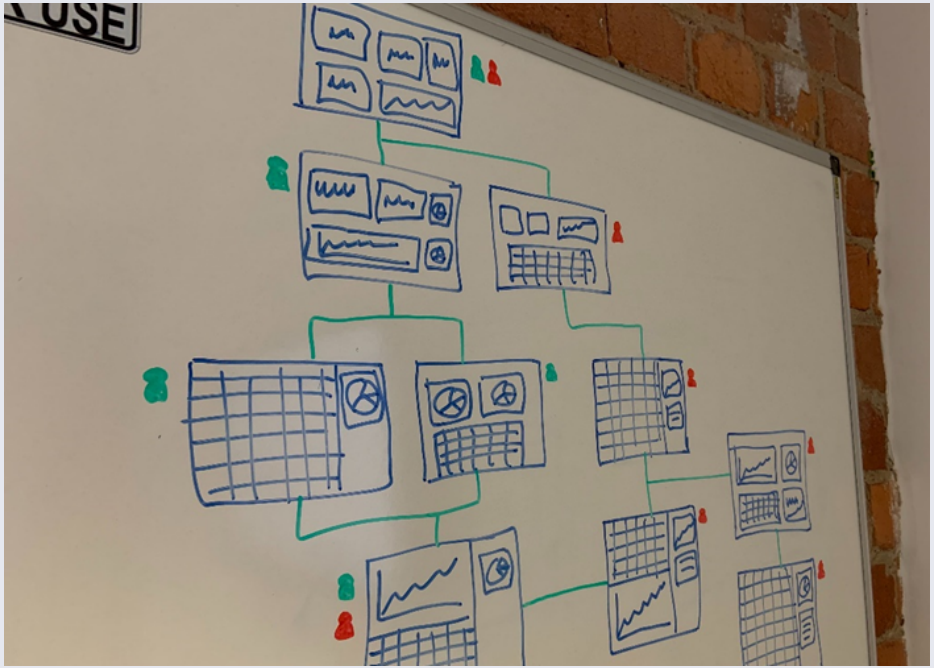
Re-envision

Start in classic

- Identify key personas and map out user journeys on classic dashboards
- Determine which dashboards can be split or consolidated to optimize for boards and worksheets
  - Large grids? Try a worksheet
  - Overview? Charts? Landing page? Try a board page
  - Many dashboards in a process – try consolidating using the Insights Panel and “Title Cards”

Wireframing 101

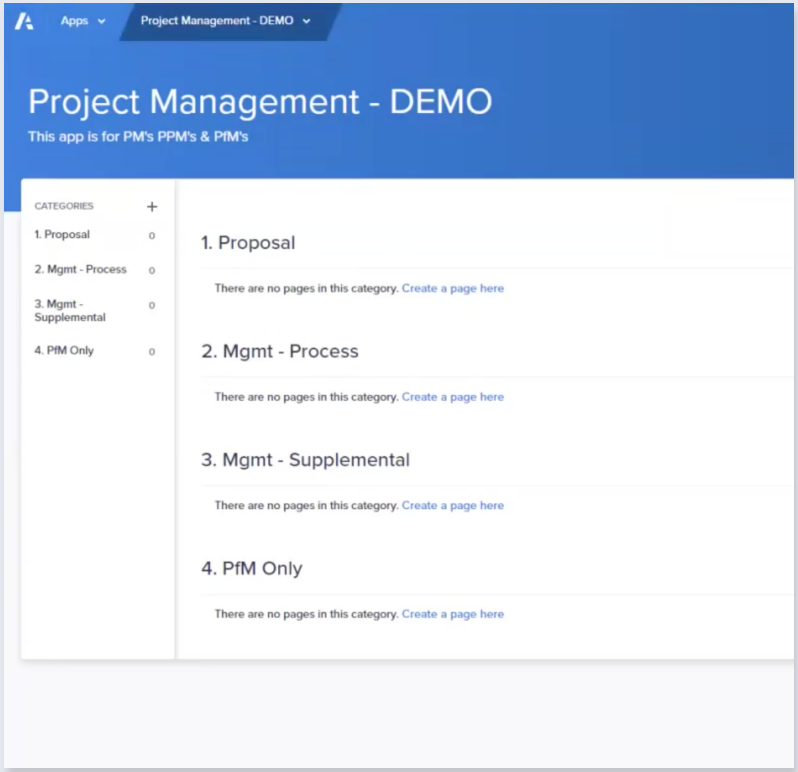
- Draw it out – wireframe with simple boxes, section, and component titles
    - You can even print the classic dashboard to make notes on top
- Take the same personas identified in classic, and map out their user journeys on the wireframes



Organize: Create an App Outline via TOC

Once you know which pages they'll have, organize by categories and set up the TOC

- Categories can be by role, process, or grouped by similarity/relation
- Unsure where to place? Create a "reference" or "supplemental" category

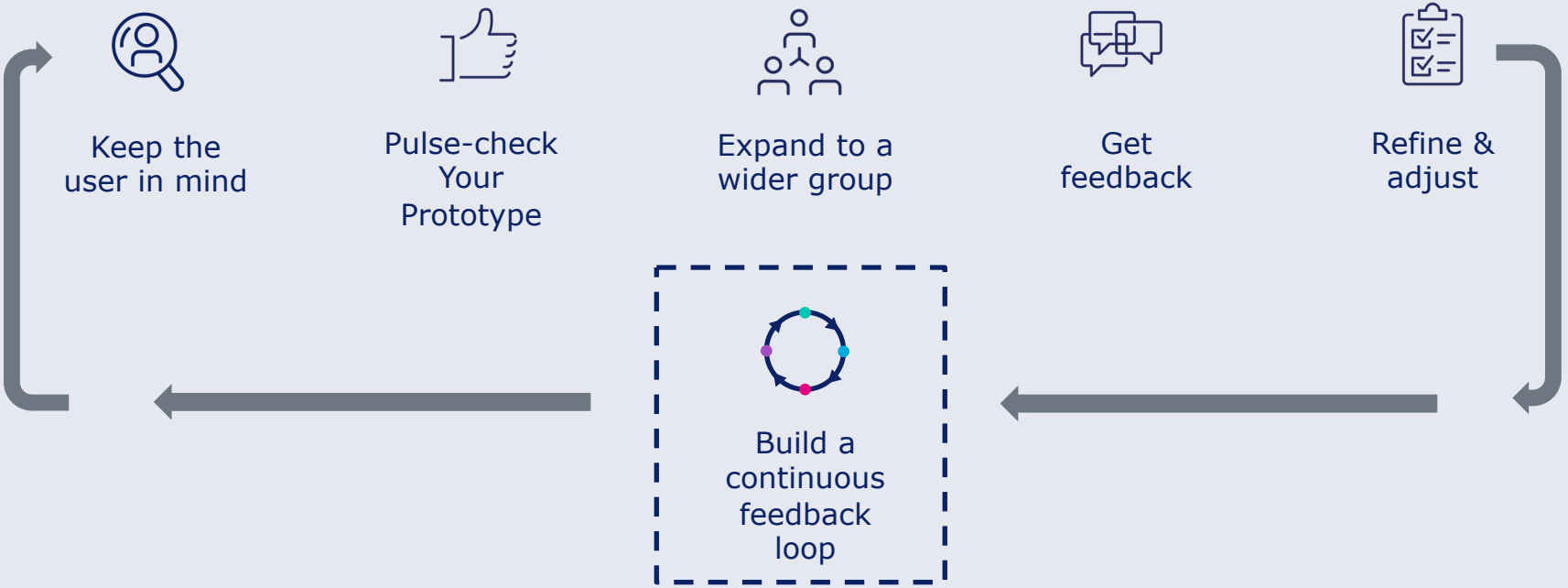


Page Build / Prototype

1. **Start with a board page**, (more familiar)
    - Encourage trying out new features: KPI cards, field cards, template library
- Follow Best Practices for Design
- Answer Questions

2. **Move on to a worksheet second**
    - Title cards vs. card preview
    - Remind them to use quick links
    - Help with bringing in the data,
    - Anticipate the bumps: know the bugs & missing functionality
        - Visibility reset after pivot
        - Context selector hide
    - Be prepared with answers

Continue the Journey



Additional Resources

- New User Experience Website – https://www.anaplan.com/platform/user-experience/
- New User Experience Program Video – https://youtu.be/scDMGql7lLA
- New UX Demo Videos
    - Web - https://youtu.be/4xWHfMOUEws
    - Mobile - https://youtu.be/CsZshOv_Jek
- New User Experience Brochure - https://www.anaplan.com/papers/enterprise-wide-transformation-begins-with-enterprise-wide-conversation/
- New UI Data Sheet - https://www.anaplan.com/datasheets/the-anaplan-user-interface/
- Mobile Data Sheet - https://www.anaplan.com/go-mobile/
- New UX E-Learning Course - https://learning.anaplan.com/course/view.php?id=949
- Community – https://community.anaplan.com/t5/Your-New-User-Experience/ct-p/platformux
- CPX Session Recordings - https://www.anaplan.com/connected-planning-xperience/
- Subscribe to the "Product Releases" blog - https://community.anaplan.com/t5/Releases/bg-p/Platform-Releases
- Accessing the New UX:
    - Login to your Anaplan Tenant
    - Click “Apps” in the **hamburger menu** in the navigation bar
    - Please note that the New UX is provisioned at the tenant level, so you will see the Pages for the tenant that you are logged into
    - To be able to build pages in the New UX you’ll need your tenant admin to assign you the role of **“Page builder”**

Staying up to date

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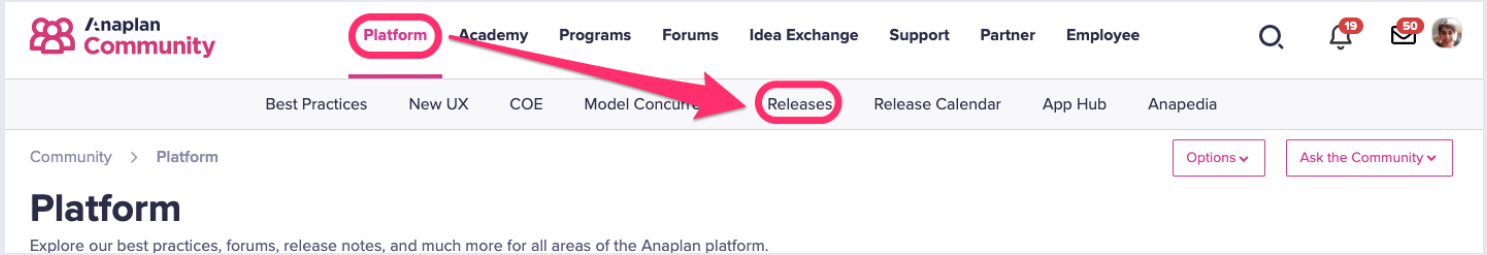
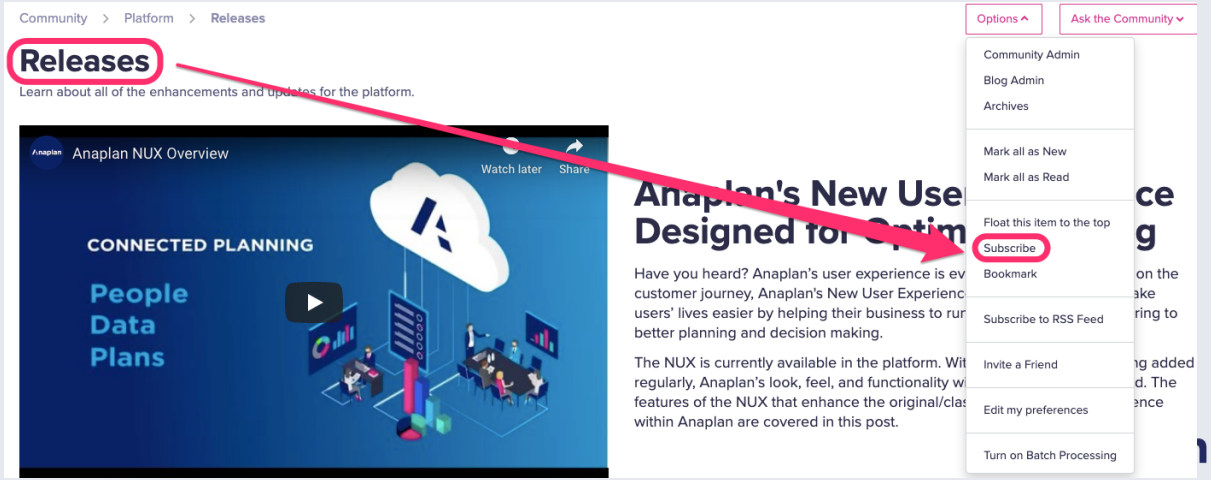
Staying up to date with New UX enhancements

- Please subscribe to the "Platform Releases" blog

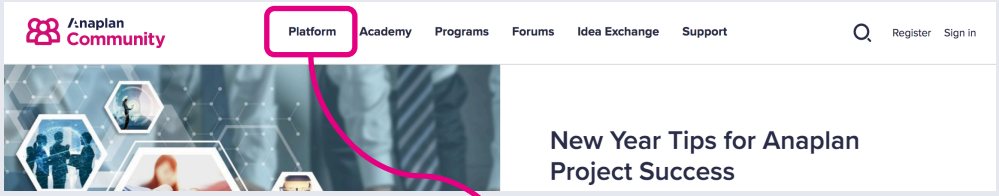




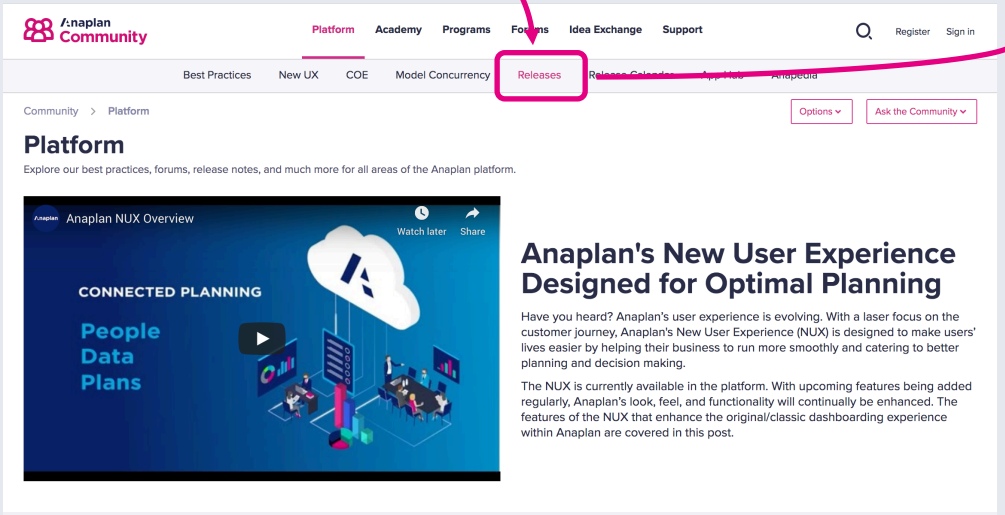
Staying up to date: New UX enhancements

- Subscribe to the "Platform Releases" blog

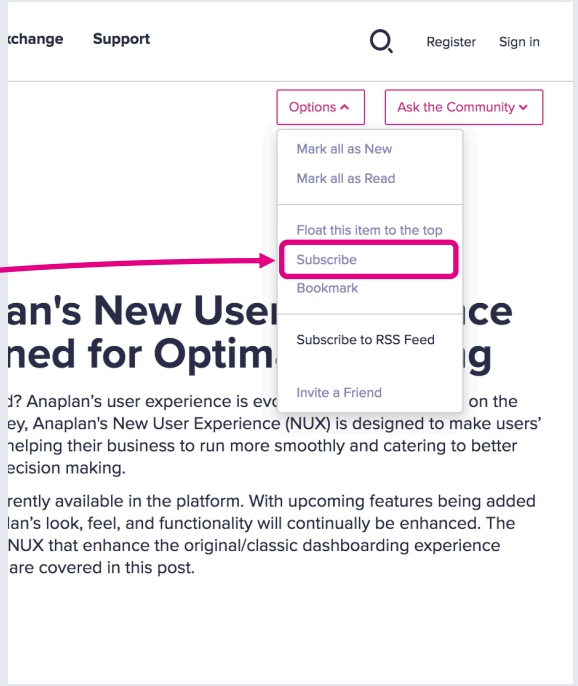
1. Community Home: Choose Platform



2. Platform –> Releases



3. Click ”Subscribe” from the Options Menu



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Help shape the future

Want to directly impact the **future Anaplan user experience?**

Join our **User Research Program:**
www.surveymonkey.com/r/anaplanux

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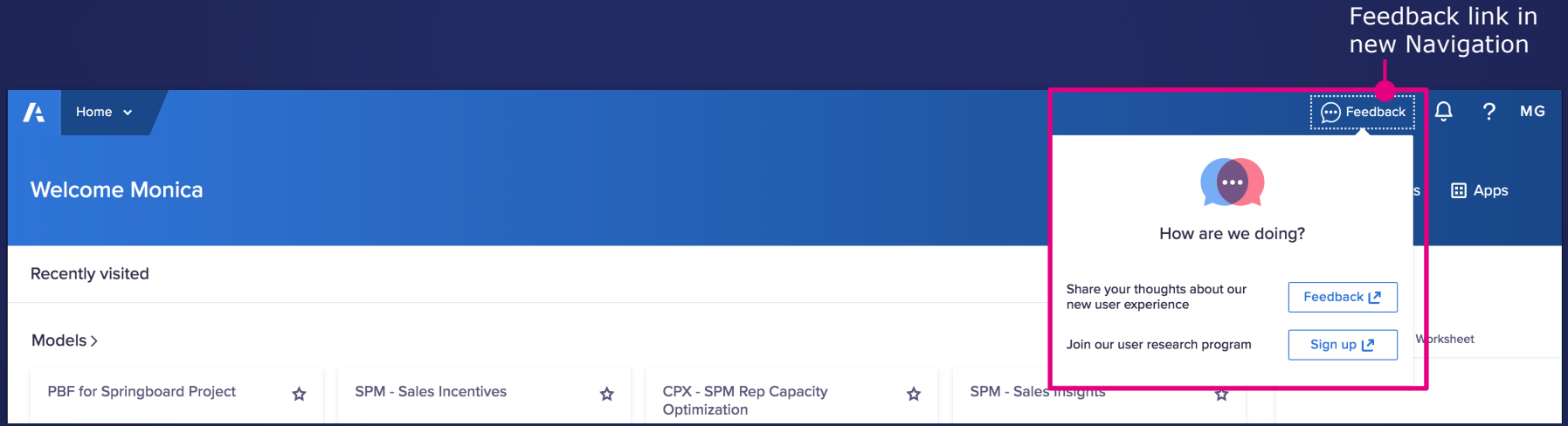
Help shape the future

Give Anaplan’s product team feedback directly in the product!



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Thank
you!
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