# Anaplan Tips & Tricks

This section provides select topics that may be useful in navigating through Anaplan and using the tool efficiently.

For reference:

The logo in the top right hand corner of the Anaplan screen provides access to a drop down menu with a multitude of helpful options. **Anapedia** is a viable resource for Anaplan users to search and browse feature overviews, instructions, and best practices for all levels of users.

∕:naplan	
udget Services - Reporting & Navigation 🗴 🐒 Revenue Units - Reporting & Navigation 🗴	Ask a question
Reset 💾 Save As My View   💾 Save As Master   🗘 Refresh 🕥 Copy 🕞 Export   🕤	Anapedia 🕑 Edit
	Show help for this page
ly Reporting Packages	Keyboard shortcuts Alt ?
	Get help from the community
buttons below to view and export quarterly reports	Chat to a support person now
ctuals Trend Reporting Go to : Actual vs Budget Analysis Go to : Monthly Actuals Report - Revenue Units	Hide tips
	Show all confirmations
Intable Proportion Share Go to : Allocation Variable Trends	Hide breakback markers
Reporting & Navigation	Hide Quick Sum Bar
	Model Origins
mmary FY18 * Total Funds *	About

## Managing Dashboard Tabs

### **Detach Tabs**

- To detach a tab, right-click and select **Undock** or drag and release the tab.
- To have two tabs open on screen at the same time, side-by-side, drag and release the tab and then use the resize arrows to adjust the size.
- Once detached, you can drag the tabs around to where you want them to be.



A Budget Services - Reporting & Navigation ×			FY Budget Model Dashboard						×	
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Budget Services Model Navigatio	n		FY Budget Model						_	
Administration & Data Management			Participation 17.5% Rate							
To import data into the model and export data out, please select "Go to: Data Upload Center"	Go to : Da	ta Upload Center	Budget Entry - First Pass      FY20		College of	Agriculture (	(Division 1)		Coll +	
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data, please select: "Go to: List Maintenance"	Go to : L	ist Maintenance	REVENUES							
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Academic Years and Terms.	Calm I have		Undergraduate Non-Resident Tuition (Allocated)	5 562 031				5.562.031		
	Go to . User /	vocess management	Graduate/Professional Tuition (Allocated)	3,432,961			•	3,432,961		
to update User Access for new and existing Users, please select Go to: User Access Management*			Differential Tuition & Course Fees (Unit Inputs)	-	-					
Go to, Gael Access management			Distance Learning Fees (Unit Inputs)	-	-					
			Other Fees (Allocated)	577,096				577,096		
			5100 - Gross Tuition and Fees Subtotal	15,675,500				15,675,500		
To set the current pass of the Budget Process, select the pass in the	Current Budget	Budget Entry - Final Pass	7300 - Student Aid (Allocated)	(1,638,246)			e	(1,638,246)		
ield to the right.	Entry Pass		7320 - Walvers (Allocated)	(2,782,269)	+			(2,782,269)		
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once the Final Fass is complete, please click. Lock Final Fass			7310 - Other Related Fees (Unit Inputs)		· •		t: 14			
To update the pass/version access for each new year, please select	Lock Final Pass		7320 - General Fund Waivers (Unit Inputs)		-					
'Go to: Budget Version Details"			5000 - State Appropriations Revenue Division 1	11,638,871			•	11,638,871		
			5010-30 - State Appropriations Revenue - Divisions	-			* *			
	Contraction of	A REAL PROPERTY AND A REAL	5300 - Contract/Grants Revenues				• · · · · ·			
	Go to : Bud	get version Details	Indirect Cost Recovery Revenues							
			Indirect Cost Recovery Expense							
o view the navigation dashboards for Budget Owners and	0.00		5400 - Gifts & Private Support Revenues						100	
college Deans, please select the appropriate button below	Go to : Budge	Cowners - Reporting	5500 - Investment Income							
sonege bears, presse sereet the appropriate battori beron.			5600 - Sales & Services Revenues				a.,			
serege create, presse serect the appropriate outcorr onlone.										
overge preses preses and appropriate parton policy.	Color College	Desert Deserting	5700 - Other Revenue							

#### **Re-attach Tabs**

• To dock a floating tab, double-click the tab.

### Navigate Tabs

- Each module or dashboard opens in a new tab.
- When the number of open tabs exceeds the width of the screen, arrows assist with navigation.

Reporting & Navigation ×	👫 FY Budget Model Dashboard 🗴	👫 Actuals Report 🙁	👫 Actuals Report Monthly - Revenue Units 🗴	👫 Budget Entry - High Level 🗴 💽
				1

scroll left through the open tabs.

scroll right through the open tabs.

 display a list of the last nine items accessed (plus any tabs you have access to). Select any item on the list.

### **Rearrange Tabs**

• To rearrange the order of module and dashboard tabs, drag them to the desired location. A green indicator displays above the tabs to help with placement.

E Budget Development Model		/tnaplan			
•	- Reporting & Navigation ×	👫 FY Budget Model Dashboard 🗴	👫 Actuals Report ×	👫 Actuals Report Monthly - Revenue Units 🗴	☆ Budget Entry - High Level ×

### **Close Dashboard Tabs**

• To close individual modules or dashboards, click the cross next to the tab name, or right-click the tab and click **Close**.

👫 Actuals Report 🄇	8
	Close

• To close all open items (including the landing dashboard), right-click any tab and then select **Close All**.

»	-E	٥	👫 FY Budget Model Dashboard 🗴	👫 Actuals Repor	t×	
					Close	
	Δ	ctu	als Report		Close All	
	-				Undock	

## **Context Menu Options & Other Features**

Right clicking in a cell or line item will display a menu of items to help manipulate the data in the element.

### Options include:

	Сору	Ctrl C
	Paste	Ctrl V
	Hide	•
	Show	•
	Show All	
	Select Levels to show	
	Select Items to show	
	Breakback	•
٩	Show History	•
5 <b>1</b> 5	Drill Down	F8
<u>.</u>	Drill to Transaction	Alt F8
T	Filter	
Ļţ≞	Sort	
<b> </b> ↔	Column Settings	
Q	Search Ctrl Shift S	

### **Show History**

All users can view data changes for a single module or selected cells; modeling changes are not shown. All user access permissions set within the model are respected.

The **Show History** menu option is only visible if the workspace administrator has enabled it. If you don't see it, check with the workspace administrator.

- In a module, or on a grid on a dashboard, select the cells to view change history.
- **Tip:** You can select a single cell, a range of cells, or one or more columns or rows. Select all visible cells in the module by clicking the top-left cell.
- View the **Show History** menu in one of the following ways:
  - Right-click the highlighted cells to view the context menu, then click **Show History**.
  - In modules, in the toolbar, click **Data > Show History**.
  - In dashboards, in the Dashboard Element menu for the grid, click **Show History**.
- Under **Show History**, you can view the change history for:

Last 24 hours	
Last 7 days	
Last 30 days	
AII	
Date range	

- The previous 24 hours, seven days, or 30 days.
- All changes made since the module or grid was created.
- A specified date range.

**Caution:** Retrieving all changes can take a long time, especially in large models.

- Review the change history in the History dialog. A maximum of 1,000 changes are shown in the dialog.
- If you want to export the complete change history as a tab delimited text file, click **Export**.
- For dashboard grids, you can roll back to a previous value by copying the cell value and pasting it into the grid.

### Drill Down

**Drill Down** enables drill down, from modules or dashboard grids, to show the formula used to calculate a value and the data cells referenced in that calculation. This is an iterative process and can be continued through many levels until the lowest level of data is reached.

Examples of how the **Drill Down** could be used include:

- Drilling down from a consolidated revenue figure to show how it was composed.
- Investigating an expense line in an income statement by drilling all the way down to the general ledger codes from which the expense or income line was derived.

*Note: Formulas are only displayed to administrators. End users only see the data cells referenced by the formulas.* 

Drill Down and Drill to Transaction provide quite different functions.

### Drill Down

- Enables you to drill down through many levels, potentially from different modules, to show the formulae used to calculate values and the data cells referenced in those calculations.
- Drill Down is an iterative process. You can continue to drill down on values until the lowest level of data is reached.
- Does not rely on SUM calculations.

### **Drill to Transaction**

• Shows the component values of a SUM calculation — you can only drill back to the source module.

### **Filter**

- The Filter icon is displayed in different ways, depending on the state of the filter.
  - Hovering over the icon will display an explanation of the filter state.

The icons show that a filter:

is applied to the grid

🝸 is disabled

√ doesn't exist

👔 is broken and showing an error

• Filter functionality can also be accessed via the Data menu in the dashboard element menu and the right-click context menu.

### **Disable or Enable Filter**

- On any module on a dashboard (in the quick access toolbar), if the Filter is applied, the user can click on it.
  - In the window that pops up, scroll down and un-check the box that says "Enable Filter" and click OK. This will temporarily disable the filter.
  - The user can go back to the Filter dialog box to check the box and Enable the filter again or "Reset" the entire dashboard.

<ul> <li>Auburn University</li> </ul>						Q <b>T</b> 🛙
	FY14	FY15	FY16	FY17	FY18	FY19
Student FTE	22,414	23,436	24,502	25,368	26,838	27,468
Faculty & Staff FTE	6,036	6,132	6,222	6,484	6,653	6,508

ine Items Time College L4				
Show items that match all 🔻 of the	he following			
Allocation Variable Trends Graphs: Student FTE College L4: Current Page	▼ is greater than	▼ 0		• •
Allocation Variable Trends Graphs: Faculty & Staff FTE College L4: Current Page	is greater than	۷ ()		00

### <u>Sort</u>

Sort enables you to reorganize the order of your data.

### Sort Rows

- Highlight the column to be used as the sort criteria and on the **Data** menu click **Sort**. (If a column is not selected, the sort will default to the column where the cursor is.)
- Set the Sort by, Order, Levels and Totals options and click OK.

Sort Ro	ws				6
Sort by T	îme - FY	14			
Order					
	۲	Lowest to Highest			
	0	Highest to Lowest			
Levels					
	~	States (summaries)			
	~	States (details)			
Totals —					
_	_			=	=
-					_
Group	at Start	Before	1	After	Group at End
<ul> <li>Enable</li> </ul>	sort				

- To position the totals of a hierarchy to appear before or after their children click one of the **Totals** icons.
  - **Group at Start**: all totals are positioned at the start. The leaf items are sorted as a group. Each level of the hierarchy is sorted separately within its own level. Levels start at the top of the hierarchical tree and work down.
  - **Before**: totals are positioned before their immediate children, which are then sorted within their subtotals.
  - After: totals are positioned after their immediate children, which are then sorted within their subtotals.
  - **Group at End**: all totals are positioned at the end. The leaf items are sorted as a group. Each level of the hierarchy is sorted separately within its own level. Levels start at the top of the hierarchical tree and work down.
- Ensure that Enable sort is selected then click OK. The Sort check box on the toolbar is

selected. Ite sort can be toggled by selecting or clearing the check box.

### **Search**

- The Search feature on the quick access toolbar allows you to search for any cell within a module grid.
- You can search any page type—including lists, line items, time, versions, and subsets—from within modules, dashboard grids, charts, and independent page selectors published to dashboards.

For example, in the screenshot below, you can see that searching for "50300" shows any Accounts (displayed on rows) as well as any Fund-Org combinations (Page Selector) that contain that number string.

● 101002-158200 ▼					Q <b>Y</b> 53
		Friday First Base	FY2	Q 50300	× – –
	Budget Entry - First Pass Budget Entry -				
	CY Budget Input \$	Comments	CY Budget Input \$	SS A3: Budget Entry	50300 - ACES State Appropriations Rev
<sup>-</sup> 50005 - State Approp-ALA Cancer Resch C	-			Revenue	
- 50015 - Teacher In-Service Cnt State Rev	-		-	SS Fund-Org: Budget	150300 - PY Drug Discovery and
<b>⊺</b> 5000 - AU State Appropriations Revenue			-	Entry	Development
<sup>50100</sup> - AUM State Appropriations Rev	-		-		101001-150300
- 5010 - AUM State Appropriations					
50200 - AAES State Appropriations Rev			-		
- 5020 - AAES State Appropriations			-		
50300 - ACES State Appropriations Rev	-		-		
5030 - ACES State Appropriations			-		•
50400 - Other State Appropriations Rev	-		-		
- 5040 - Other State Appropriations					•
- 500 - State Appropriations Revenue					

- Results are shown as a flat list and include the items in the dimension the page selector is based on.
- Clicking on any of the search results will take you to that Row/Column/Page Selector.

### <u>Maximize</u>

• The Maximize feature can be used to expand a grid on a dashboard to fit the entire dashboard by clicking the 53 icon in the quick access toolbar.

Budget Development Model		/tnapla	an								٩	?	3
🕂 🔅 👫 Revenue Budget Entry - Detailed 🗴	Si Expense Budget Entry - Detailed ×												
This report shows the full statement of activities	• FY Budget College of Agriculture (Division	1) 🔻 Budget E	Entry - First Pas	is •		QT	7 55	-					
down to Unit Margin.				FY20			-						
		Unrestricted	Restricted	Auxiliary	Service Center	Total Funds	s	laximize	1				
Report will update as data is entered into the													
Budget Entry module below.	REVENUES												
	Undergraduate Resident Tuition (Allocated)	6,103,412	-			6,103,41	12						
	Undergraduate Non-Resident Tuition (Allocated)	5,562,031	-			5,562,03	31						
	Graduate/Professional Tuition (Allocated)	3,432,961	-		(); ();	3,432,96	51						
	Differential Tuition & Course Fees (Unit Inputs)	-	-		e (*		-						
	Distance Learning Fees (Unit Inputs)	-	-				-						
	Other Fees (Allocated)	577,096				577,09	96						
	5100 - Gross Tuition and Fees Subtotal	15,675,500	-			15,675,50	00						
	7300 - Student Aid (Allocated)	(1,638,246)	-			(1,638,24	6)						
	7320 - Waivers (Allocated)	(2,782,269)				(2,782,26	9)						
	5000 - State Appropriations Revenue Division 1	11,638,871				11,638,87	71						
	5010-30 - State Appropriations Revenue - Divisions	-											

### After clicking Maximize:

Budget Development Model					/tnapl
🕂 🔅 👫 Revenue Budget Entry - Detailed	× 👫 Exp	ense Budget E	intry - Detaile	d ×	
<ul> <li>FY Budget College of Agriculture (Division 1)</li> </ul>	<ul> <li>Budget Ei</li> </ul>	ntry - First Pas	s 💌		
			FY20		
U	Inrestricted	Restricted	Auxiliary	Service Center	Total Funds
	_				
REVENUES					
Undergraduate Resident Tuition (Allocated)	6,103,412	-			6,103,412
Undergraduate Non-Resident Tuition (Allocated)	5,562,031	-			5,562,031
Graduate/Professional Tuition (Allocated)	3,432,961	-			3,432,961
Differential Tuition & Course Fees (Unit Inputs)	-	-			-
Distance Learning Fees (Unit Inputs)	-	-			-
Other Fees (Allocated)	577,096	-			577,096
5100 - Gross Tuition and Fees Subtotal	15,675,500	-			15,675,500
7300 - Student Aid (Allocated)	(1,638,246)	-			(1,638,246)
7320 - Waivers (Allocated)	(2,782,269)	-			(2,782,269)
5000 - State Appropriations Revenue Division 1	11,638,871	-			11,638,871
5010-30 - State Appropriations Revenue - Divisions	-	-			-
5300 - Contract/Grants Revenues	-	-			-
Indirect Cost Recovery Revenues	-	-			-
5400 - Gifts & Private Support Revenues	-	-			-
5500 - Investment Income	-	-			-
5600 - Sales & Services Revenues	-	-			-
5700 - Other Revenue	-	-			-
5200 - Government Appropriations	-	-			-
Total Revenues	22,893,856	-			22,893,856
CYDENCE C					
EAPENSES Salarion	0.495.633	1 424 476			10.020.000
Manag	9,405,025	1,434,470			10,920,099
Wages	915,475	475,620			5 202 562
Composed Benefits	4,020,924	475,050			5,302,503
Z400 Environment & Improvi Constal Accests All	15,228,020	2,017,515			17,240,030
7400 - Equipment & Improv Capital Assets AU	-	-			
7000 - Otilities	-	-			
7005 - Communications	-	-			
7010 - Rentals & Operating Leases		-			
7010 - Repairs & Maintenance Services	-	-			-
7020 - Repairs & Maintenance Supplies		-			
7025 - Travel-Individuals	-	-			

#### Click **Restore** to minimize the grid.

Budget Development Model					/tnapl
🔉 📲 🕸 👫 Revenue Budget Entry - Detai	led × 👫 Exp	pense Budget E	ntry - Detaile	ed ×	
EV Budget College of Agriculture (Division	1) × Budget E	intro Eiret Dae			
College of Agriculture (Division	i) - Duugeri	anuy - r irst r as			
			FY20		
	Unrestricted	Restricted	Auxiliary	Service Center	Total Funds
REVENUES					
Lindergraduate Resident Tuition (Allocated)	6 103 412				6 103 412
Undergraduate Non-Resident Tuition (Allocated)	5 562 031	-			5 562 031
Graduate/Professional Tuition (Allocated)	3 432 961				3 432 961
Differential Tuition & Course Fees (Unit Inputs)		-			0,102,001
Distance Learning Fees (Unit Inputs)					
Other Fees (Allocated)	577.096				577.096
5100 - Gross Tuition and Fees Subtotal	15 675 500	-			15 675 500
7300 - Student Aid (Allocated)	(1.638.246)	-			(1.638.246)
7320 - Waivers (Allocated)	(2,782,269)	-			(2,782,269)
5000 - State Appropriations Revenue Division 1	11,638,871				11,638,871
5010-30 - State Appropriations Revenue - Divisions	-	-			-
5300 - Contract/Grants Revenues					-
Indirect Cost Recovery Revenues	2	1			-
5400 - Gifts & Private Support Revenues		<u> </u>			-
5500 - Investment Income	( i i i i i i i i i i i i i i i i i i i	÷			-
5600 - Sales & Services Revenues		-			-
5700 - Other Revenue	1	-		-	-
5200 - Government Appropriations	-	-			-
Total Revenues	22,893,856				22,893,856
EXPENSES	0 105 000	4 434 470			40.020.000
Salaries	9,485,623	1,434,476		1 1	10,920,099
wages	915,473	107,401			1,022,874
Employee Benefits	4,820,924	4/5,038			5,302,503
Zing Environment & Improve Comited Aposto All	15,228,020	2,017,515			17,240,030
7400 - Equipment & Improv Capital Assets AU				1	
7000 - Utilities		-		-	-
7005 - Communications	-	-			-
7010 - Rentais & Operating Leases		-			-
7015 - Repairs & Maintenance Services		-		-	-
7020 - Repairs & Maintenance Supplies	-	-			
7025 - Travel-Individuals		-			-
7030 - Travel-Groups		-			-

### <u>Pivot</u>

Pivot is one of the most powerful tools in Anaplan. It gives access to all the lists and roll-ups that are relevant to a specific module and lets the user re-order how they appear. Data can be pivoted in different ways: put lists in rows, columns, or multiple page selectors.

- Every module element on a dashboard comes with ability to pivot.
- In any grid view go to the Menu Options by clicking the blue down arrow on the top left of the module element. Then click **View** > **Pivot**.

In the **Pivot** dialog box, click on any of the dimension names and drag into one of the three boxes:

- Drag it into the **Rows** panel if you want the items in that list to appear down the left side of the grid as row labels.
- Drag it into the **Columns** panel if you want the items in that list to appear across the top of the grid as column headings.
- Drag it into the **Pages** panel if you want that item to be one of the drop-down page selectors on the grid.
- Click **OK** to save.

	Budget Development Mode	el		
»	🖷 🔅 🕺 FY Budget Model Dasi	hboard	×	
	👫 Master 🌖 Reset 💾 Save	As My V	ew   💾 Save	As Master   🗘 Refre
	FY Budget Model			
	Participation Rate			
	<ul> <li>Budget Entry - First Pass</li></ul>	)		
	Maximize	-		College of Agriculture
	View	•	Pivot	Restricted Auxiliary
	Edit		6 102 412	
		1	5 562 031	
D I	Format		3 432 961	-
		1		-
	Data			
			577,096	-
	Q Search Ctrl Shift S		15,675,500	(a)
	Open source module		(1,638,246)	-
	Open source module		(2,782,269)	-

### Original Grid View :

FY Budget Model Dashboard ×					
Master 🥎 Reset 💾 Save As My View	💾 Save	As Master	() Refres	h 🖒 Copy	⊖ Export
FY Budget Model					
Participation 17.5%					
<ul> <li>Budget Entry - First Pass * FY20</li> </ul>					
Budget Entry - First Pass      FY20		College of	f Agriculture	(Division 1)	
<ul> <li>Rate</li> <li>✓ Budget Entry - First Pass ▼ FY20</li> </ul>	Unrestricted	College of Restricted	f Agriculture Auxiliary	(Division 1) Service Center	Total Funds
Rate     Budget Entry - First Pass * FY20	Unrestricted	College of Restricted	f Agriculture Auxiliary	(Division 1) Service Center	Total Funds
Rate     Budget Entry - First Pass      FY20  REVENUES Undergraduate Resident Tuition (Allocated)	Unrestricted	College of Restricted	f Agriculture Auxiliary	(Division 1) Service Center	Total Funds 6,103,412
	Unrestricted 6,103,412 5,562,031	College of Restricted	f Agriculture Auxiliary	(Division 1) Service Center	Total Funds 6,103,412 5,562,031
	Unrestricted 6,103,412 5,562,031 3,432,961	College of Restricted	f Agriculture Auxiliary	(Division 1) Service Center	Total Funds 6,103,412 5,562,031 3,432,961
	Unrestricted 6,103,412 5,562,031 3,432,961	College of Restricted	f Agriculture Auxiliary	(Division 1) Service Center  	Total Funds 6,103,412 5,562,031 3,432,961

### Original Pivot View :

Pages	SS of Version: Budget Entry	Budget
	Columns	Image: College L4         Image: Restricted_Unrestricted_Aux L1
Rows	E Line Items	

### Example:

Change the Pivot so that "College L4" shows up as a Page Selector by dragging and dropping College L4 from the Columns section to Pages section. Click **OK**.

Pages	SS of Version: Budget Entry	③ Budget !≡ College L4
	Columns	E Restricted_Unrestricted_Aux L1
	E Line Items	
Rows		

New Grid View:

FY Budget Model						
Participation Rate						
Sudget Entry - First Pass * FY20 College o	of Agriculture (Divi	ision 1) ▼			QV	K Z
	Unrestricted	Restricted	Auxiliary 9	Service Center	Total Funds	
REVENUES						
Undergraduate Resident Tuition (Allocated)	6,103,412	-	-	-	6,103,412	
Undergraduate Non-Resident Tuition (Allocated)	5,562,031	-	-	-	5,562,031	6
Graduate/Professional Tuition (Allocated)	3,432,961	-	-	-	3,432,961	
Differential Tuition & Course Fees (Unit Inputs)	-	-	-			
Distance Learning Fees (Unit Inputs)	-	-	-	-	-	

# **Exporting Dashboards & Miscellaneous**

The **Export to PDF** option, on the dashboard menu, exports the current page of a dashboard (excluding any images) to PDF format.

	Budget Development Model									
»	÷	٥	Revenue B	udget Entry - Detailed 🗙						
	¶i N	laster		💾 Save As My View	💾 Save As Master	() Refresh	ලි) Copy	⊖ Export	5	

- **Export to PDF** will export only one page at a time (the number of pages for each grid can run into thousands, making the export unmanageable).
- To export further pages, change the page and re-run the export for each one. If you want to export multiple pages to PDF, the **Excel add-in** may be more suitable for producing management packs consisting of multiple pages from the same module view.

- If you want to export only one element from a dashboard, select the element, click **Maximize** on the dashboard element menu (the element will occupy the whole screen), then click **Export to PDF**.
- Because <u>images on dashboards</u> are linked rather than embedded, they are not included when exporting dashboards to PDF. White space is displayed instead.

The output will contain:

- grids, charts, page selectors, and individual line items.
- any conditional formatting that has been applied.
- Boolean line items displayed as a tick (for true) or blank (for false).
- grid styles (Classic, Clear, Ruled and Striped), as applied on the dashboard.

The output **will not** contain:

- module names and page selectors are not shown in the output.
- hidden elements on the dashboard
- dashboard images

### **Export a dashboard to PDF**

- On the dashboard menu click **Export to PDF**.
- Set the Page Size, Orientation, Margins, and Grid Handling.
- Click OK.

### **Export to PDF Options**

Page Size	Choose a page size: A5, A4, A3, Letter (default), Folio, Legal or Executive.
Orientation	Select the layout: <b>Portrait</b> or <b>Landscape</b> .
Margins	The left, top, right and bottom margin size can be customized. Margins are measured in millimeters. The default value is 10mm.
Grid Handling	The grids and charts shown on a dashboard can be huge and will not necessarily fit on a page, even on an A3 landscape page with small margins. The grid handling options help you manage this: select
	Truncate will export only the rows and columns you can see on the screen.

	Split will export all the grid, split over the number of pages required to display it all.
	Fit to Page will shrink the grid to fit the page size selected. If the grid is quite large, it may become too small to read.
Replicate Row Labels	<b>Replicate Row Labels</b> repeats row labels across all pages of the output. If you turn this option off, the row labels are displayed on the first page of the output only, subsequent pages have no row labels.
Append Grid Exports	If <b>Append Grid Exports</b> is selected in conjunction with the <b>Grid</b> <b>Handlin</b> g option, <b>Truncate</b> , any rows and columns not visible on the screen with be appended to the end of the export.

### **Grid Handling Options**

#### Truncate

The **Truncate** option on the **Grid Handling** list hides columns if they do not fit in the page width available. This is the default setting and is roughly 'what you see is what you get' depending on how well your screen dimensions match the page size and orientation. There is a minimum font size below which the columns will be truncated. Select **Append Grid Exports** to show the missing columns on other pages.

### Split

The **Split** option will split the grid onto multiple pages if it does not all fit on the page. **Replicate Row Labels** is selected by default, but if you clear this setting it will only show the row labels on the first view of the grid and will hide them on subsequent pages to save space.

### Fit to page

Fits to the page width. Tall grids will still span multiple pages.

### Export Module Element from Dashboard to Excel / .csv File

Export any module element directly from a dashboard to Excel or .csv file.

- For the module element that the user wants to export, go to the Menu Options.
  - Click on Data > Export
  - In the Export dialog box, select:
    - File Type

- Layout: Grid is most commonly used
- What to Include/Exclude
  - Current Page: This will only export data for the Page Selectors that were shown when you clicked Export. For example, in the screenshot below, this would only export the grid for 121211 – GR Tuition & Fees – Arts & Sciences for Fund 100 – Unrestricted – Operating.
  - All Pages: This will export all Org/Fund Combinations.
- Selections for Omit Items
  - Omit Summary Items: Recommended to leave this unchecked
  - Include/Omit Empty Rows
- Click Export.

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5000	- State Appro	opriations Revenue	Division		Breakback	· .		
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5300	- Contract/G	rants Revenues		0	Snow History	• -		-

Export			0 x
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### Personal Dashboards

Anaplan provides an end user the ability to save a personal dashboard. This will enable an end user to save a copy of a master dashboard to capture their preferences and customize it. Anything a user can change, they can save to a personal dashboard, within the restrictions applied by the administrators.

- Each user can save one personal dashboard for each master dashboard, including their landing dashboard.
- Once a personal dashboard has been created, the personal dashboard, not the master, will be opened whenever the user selects that particular dashboard.

Note: When an administrator makes an amendment to a master dashboard, all personal dashboards based on that master will be reset to the master dashboard to ensure that the content of both are always synchronized.

The dashboard toolbar will include a button to save a personal dashboard and one to switch between the personal dashboard and the master.



- The Master, or My View, button toggles between the master and personal dashboards.
- The **Save as My View** button toggles to Delete My View when a personal dashboard has been saved. This button is inactive until a change is made to the dashboard.
- The values saved to a personal dashboard for the Current Period and/or Version persist and do not update when those values change—users must manually update these values on their personal dashboards.
- Users can discard any changes and reinstate the personal dashboard as it was the last time they saved it using the **Reset** button providing workspace administrators have made no changes to the master dashboard in the meantime. Reset reverts the personal dashboard to its last saved state; it does not revert the personal dashboard to being the same as the master dashboard.

In this example, the end user wants to hide certain rows.

• After making desired changes to the module within a dashboard, select **Save as My View** on the header row.

				/tnaplan									
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Toggle between the master and personal dashboards using the **Master**, or **My View** selector. •

An end user can select **Delete My View** to delete the view. •

Revenue Units - Reporting & Navigation x	ense Budget Entry - Detailed x									
Trevenue crisis - reporting a nevigenori * [3] EX.	Sense Budget Entry - Detailed									
My View 👻 🌖 Reset 💾 Save My View	⊞ Delete My View	ort   🕤								
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This report sh Master View atement of activities	FY Budget Harrison School or Charmacy (I	Division 1) 🔻 E	Budget Entry - I	First Pass 🔹						
down to Unit Margin.				FY20						
		Unrestricted	Restricted	Auxiliary	Service Center	Total Funds				
Report will update as data is entered into the										
Budget Entry module below.	REVENUES									
	Undergraduate Resident Tuition (Allocated)	32,483			-	32,483				
	Undergraduate Non-Resident Tuition (Allocated)	31,543			-	31,543				
	Graduate/Professional Tuition (Allocated)	11,451,971	-			11,451,971				
	Differential Tuition & Course Fees (Unit Inputs)		-							
	Distance Learning Fees (Unit Inputs)									
	Other Fees (Allocated)	256,576			-	256,576				
	5100 - Gross Tuition and Fees Subtotal	11,772,573				11,772,573				
	7300 - Student Aid (Allocated)	(8,992)				(8,992)				
	7320 - Waivers (Allocated)	(502,521)			-	(502,521)				
	7300 - Tuition Related Fees (Unit Inputs)		-							
	7310 - Other Related Fees (Unit Inputs)		-							
	7320 - General Fund Walvers (Unit Inputs)									
	5000 - State Appropriations Revenue Division 1	6,444,074	-			6,444,074				
	5010-30 - State Appropriations Revenue - Divisions	-	-							
	5300 - Contract/Grants Revenues	-	-							
	Indirect Cost Recovery Revenues									
	Indirect Cost Recovery Expense		-				-			
Expense Budget Entry Note: Actuals presented below are only for accounts th	hat have been historically budgeted. Please refer to the	Actuals Report	on the landing	dashboard fo	or full actuals rep	orting.				
<ul> <li>Budget Entry Fund-Org Filter</li> </ul>	Expense Budget Entry - Detailed Level 10	01003-150000 <del>-</del> FY14	FY15	FY16	FY17	FY18		FY19		
A		Actual	Actual	Actual	Actual	Actual	Actual	Adopted Budget		
101200-150007							Antonie	DV Budget \$	CV Bude	
101200-150007 150007 - Pharmacy Constituency		Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	F I Dudget a	CT DUU	w.,
101200-150007 150007 - Pharmacy Constituency 101001-150000		Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	P T Dudget a	Input	š
101200-150007 150007 - Pharmacy Constituency 101001-150000 260001-150000	<b>Γ7000 - Utilities</b>	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	-	Input	ŝ

### Suppressing Zeros

• Click anywhere in the upper left quadrant to select the entire data set.

### *Note: It will highlight in blue when selected.*

	Anaplan										?
• C A Revenue Units - Reporting & Navigation ×	☆ Expense Budget Entry - Detailed ×										
🐒 Master 🥠 Reset 💾 Save As My View 📔	Save As Master   🗘 Refresh 🖻 Copy	Export	5								🖉 Edi
	Other Fees (Allocated)	256,576			-	- 256,576					
	5100 - Gross Tuition and Fees Subtotal	11,772,573			-	- 11,772,573					
	7300 - Student Aid (Allocated)	(8,992)				- (8,992)					
	7320 - Waivers (Allocated)	(502,521)				- (502,521)					
	7300 - Tuition Related Fees (Unit Inputs)										
	7310 - Other Related Fees (Unit Inputs)	-									
	7320 - General Fund Walvers (Unit Inputs)	-	-		-						
	5000 - State Appropriations Revenue Division 1	6,444,074			-	- 6,444,074					
	5010-30 - State Appropriations Revenue - Divisions	-			-						
	5300 - Contract/Grants Revenues				-						
	Indirect Cost Recovery Revenues										
	Indirect Cost Recovery Expense										
	5400 Giffe & Drivsta Sunnort Devenue						<b>-</b>				
Note: Actuals presented below are only for accounts that Budget Entry Fund-Org Filter	Ave been historically budgeted. Please refer to the a second seco	Actuals Report	t on the landing	dashboard fo	r full actuals re	porting.					
	•	FY14	FY15	FY16	FY17	FY18		FY19		FY20	
101200-150007		Actual	Actual	Actual	Actual	Actual	Actual	Adopted Budget	Budg	et Entry - First Pass	Buc
150007 - Pharmacy Constituency		Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	PY Budget \$	CY Budget	Comments	C
101001-150000			0						input \$		
101003-150000	7000 - Utilities	-	ų					÷			
260001-150000	7005 - Communications		-								
260002-150000	7010 - Rentals & Operating Leases		-					-			
150000 - Pharmacy Administration	-7015 - Repairs & Maintenance Services										
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	7300 - Student Aid (Allocated)		(8.992)			(8.992)					
	7320 - Waivers (Allocated)	(5	02.521)			(502,521)					
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readily presented below are only for decounts	that have been historically budgeted. Hease rele	r to the Actuals	Report on the landing	) dashboard for t	full actuals repo	rting.					
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udget Entry Fund-Org Filter 20002-150000 2000-Pharmacy Administration 10102-150004 2004-Pharmacy Administration 10102-15007 2004-Pharmacy Administration 2019-15007 Assoc Dean Resch and Gr 10101-15002 2002-15007 Ork Academicand Studentu 20101-15002 2002-21507 Ork Academicand Studentu 20101-15012 2002-2150101 20101-15012 2002-2150101 20101-2012 2012-2012 2012-2012 2012	Comparing Expense Budget Entry - Detailed Lev     Maximize     View     Edt     Format     Containe     Q Search     Containe	er lo the Actuals er lo 101001-11 FY Actual Actual Expo ▼ Filter Its Sort. Breal Show	Report on the landing           50300 *           14         FY15           tail         Actual           al \$         Actual           al \$         Actual           13.320         -           14.13.322         -           14.13.322         -           14.13.322         -           14.13.322         -           14.13.322         -           14.13.322         -           14.13.322         -           14.13.322         -           15.13.322         -           16.13.322         -           17.05         -           17.06         -           17.07         -           14.13.322         -           15.13.322         -           15.13.322         -           15.13.322         -           15.13.322         -           15.13.322         -           16.13.322         -           17.06         -           17.07         -           17.08         -           17.09         -           17.09         -           17.09	FY16 Actual Actual 1.268 1.395 16.371 1.556 16.371 1.556 15.579 3.566 9.721 3.599 3.566 9.721 3.599 3.566 9.721 3.599 3.566 9.721 3.599 3.566 9.721 3.599 3.590 3.	FY17 Actual Actual 5 370.3 3,017 14,029 6,179 7,754 1,364 1,364 2,509 14,875 13,819 4,789 4,789 4,789	FY18 Actual Actual \$ 57.24 8.022 13.493 2.893 2.893 2.893 2.893 2.593 2.5943 7.724 3.307 158.493 	FY19 Actual Adopted Budget Actual P Budget S - - - - - - - - - - - - - - - - - - -	Budget Entr CY Budget Input \$ - - - - - - - - - - - - - - - - - - -	FY20 y - First Pass Comments	Q <b>T</b>	
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The following example illustrates how to filter on **ALL VERSIONS**.

Anaplan provides several options for the end user to filter on.

Dimensions include:

- Module & Line Item
- Time
- Versions
- Fund/Org
- On the first tab:
  - Click on the drop down arrow next to the selections to choose how you want to filter.
  - Choose the dimension to filter on.

\* In this example, the end user is choosing to select to filter on **ALL VERSIONS.** 

			/tnaplan									(
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	1	Distance Lear Other Fees (A 5100 - Gross 7300 - Studen 7320 - Waiver	ning Fees (Unit Inputs) liocated) Tuttion and Fees Subtotal t Aid (Allocated) s (Allocated)	256,576 11,772,573 (8,992) (502,521)	-	-	: : : : :	256,576 11,772,573 (8,992) (502,521)				
F	ilter 🔶	7300 - Turbon	Related Fees (Unit Innuts)					Θ×				
	▼ SS A2: Budget Entry Expense Show items that match all ▼	es Time / SS	of Version: Actuals & Budget Entry	/ Line Items	SS Fund-Org: Bud	get Entry						
Expen	Expense Budget Entry - Detail Level: Actual S Time: All Periods SS of Version. Actuals & Budg Entry: All Versions SS Fund-Ora: Budget Entry:	ed et is gre	ater than • 0					• •				
- Budget Er	All versions Actual Adopted Budget Budget Entry - Fil	st Pass								FY19		FY20
260002.1	Budget Entry - Se	cond Pass							Actual	Adopted Budget	Budo	et Entry - First Pass
150000 - P 101002-1	Budget Entry - Fi	al Pass							Actual \$	PY Budget \$	CY Budget Input \$	Comments
150004 - P 101001-1												
150019 - H 101001-1 150020 - H						ОК	Cancel	Clear All				
101001-150021			le Service Expenses	4,860	1,709	4,402	1,474	10,387				
150021 - HSOPOff	cT		hips & Dues	130	270	1,329						
101001-150022		7077 - Servic	es-Internal Charges Only	14,735	14,101	18,528	15,845	23,672				
150022 - HSOPOff	cInfoandInstructionalTec	7080 - Other	Administrative Costs	596.3	566	843	1,364	2,206				

- Select the filter type.
- Click OK.

		<i>I</i> ₄naplan							
🗘 🧌 Revenue Units - Reporting (	Navigation ×	Expense Budget Entry - Detailed * ×							
Master 🥎 Reset 💾 Save As I	Ny View 🛛 💾 S	Save As Master 🗘 Refresh 🕥 Copy	⊖ Export	5					
		Distance Learning Fees (Unit Inputs) Distance Learning Fees (Unit Inputs) Other Fees (Allocated) 5100 - Gross Tuition and Fees Subtotal 7300 - Student Aid (Allocated) 7300 - Vision (Allocated)	256,576 11,772,573 (8,992)	-	-		256,576 11,772,573 (8,992)		
		7320 - Walvers (Allocated) 7300 - Tuition Related Fees (Unit Inputs)	(502,521)	-	-		(502,521)		
Expense Budget Expense Budget Expense Store Show items that m Expense Budget I beel Actuals Time: Fr14 SS of Version: A SS Fund-Org: Bu Current Page → Budget Ei	Entry Expenses atch all • of the Entry - Detailed tuals & Budget get Entry:	Time / SS of Version: Actuals & Budget Entry following is greater than is equal to is not equal to is less than or equal to is greater than or eq	y / Line Items SS	Fund-Org: Bu	dget Entry		© ×		
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260002-1: 150000 - PI 101002-1: 150004 - PI Enable filter	Clear							Actual Actual \$	Adopted Budget PY Budget \$
101001 1									
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101001-1 150019 - H 101001-1 150020 - H 101001-150021 150021 - HSOPOffcTeachingLearninga	ndA	7050 - Reportable Service Expenses 7065 - Membershins & Duce	4,860	1,709	OK 4,402 1,329	Cancel	Clear All 10,387		
101001-1 150019 - H 101001-1 150020 - H 101001-150021 150021 - HSOPOffcTeachingLearninga 101001-150022	ndA	7050 - Reportable Service Expenses 7065 - Memberships & Dues 7077 - Service-Internal Charges Only	4,860 130 14,735	1,709 270 14.101	OK 4,402 1,329 18,528	Cancel 1,474 -	Clear All 10,387		
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101001-1 100019-H 101001-1 150020-H 101001-150022 150024-HSCPORTcTeachingLearninga 101001-150022 150022-HSCPORTcTeachingLearninga 101001-150022	ndA ITec	7050 - Reportable Service Expenses 7065 - Memberships & Dues 7077 - Service-Internal Charges Only 7080 - Other Administrative Costs 7085 - Other Administrative Costs	4,860 130 14,735 596.3 1.423	1,709 270 14,101 566 2,944	OK 4,402 1,329 18,528 843 5,205	Cancel 1,474 - 15,845 1,364 2,599	Clear All 10,387 23,672 2,206 4 929		
101001-1 150019 - H 101001-0 150020 - H 101001-150027 101001-150027 101001-150027 15002 - HSOPORtoficadinstructions 15000 - Pharmacy Administration 101001-150101	ndA ITec	7050 - Reportable Service Expenses 7065 - Memberships & Duos 7077 - Services-Internal Charges Only 7080 - Other Administrative Costs 7065 - Other General Expenses 7069 - Survice Survivases	4,860 130 14,735 596,3 1,423 18,453	1,709 270 14,101 566 2,944 19,829	OK 4,402 1,329 18,528 843 5,205 15,979	Cancel 1,474 15,845 1,364 2,509 14 975	Clear All 10,387 23,672 2,206 4,929 25,943		
101001-1 150019-14 150019-14 101001-190011 101001-190011 101001-190012 150002-1HSDP0012feechingLearnings 15000-2-HSDP0012feechingLearnings 15000-2-HSDP0012feechingLearnings 15000-2-19011 15000-190115 svc Research & Far E	hdA	7050 - Reportable Service Expenses 7065 - Memberships & Dues 7075 - Service-Internal Charges Only 7080 - Other Administrative Costs 7085 - Other Cancel Expenses 7090 - Supply Purchases 7000 - Isou-Cancel Enzimment	4,860 130 14,735 596,3 1,423 16,453 2,313	1,709 270 14,101 566 2,944 19,829 5,558	OK 4,402 1,329 18,528 843 5,205 15,979 3,566	Cancel 1,474 15,845 1,364 2,509 14,975 13,619	Clear All 10,387 23,672 2,206 4,929 25,943 7,724		
101001-1 150019-H 101001-1 150020-H 101001-190021 150021-HSDPORTeschingLearnings 101001-150012 150022-HSDPORTeschingLearnings 15000-Pharmacy Administration 101001-150101 150101-Public Svc Research & Ext - F 101002-150103	hdA ITec	7050 - Reportable Service Expenses 7065 - Memberships & Dues 7077 - Service-Infeand Charges Only 7080 - Other Administrative Costs 7085 - Other General Expenses 7080 - Supply Purchases 71100 - Non-Capital Equipment 7115 - Communice Fromenes	4,860 130 14,735 596,3 1,423 18,453 2,313 2,112	1,709 270 14,101 566 2,944 19,829 5,526 1,706	OK 4,402 1,329 18,528 843 5,205 15,979 3,566 9,771	Cancel 1,474 - 15,845 1,364 2,509 14,975 1,619 4,789	Clear All 10,387 - 23,672 2,206 4,929 25,943 7,724 3,307		

An end user can revert to the original layout by selecting **RESET** on the toolbar.

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🕽 Budget Entry Fund-Org Filter 💦 🔍 🍸	58 ¥¥ ≥ 260001-150000 ▼									
	A	FY14	FY15	FY16	FY17	FY18		FY19		FY20
101200-150007		Actual	Actual	Actual	Actual	Actual	Actual	Adopted Budget	Budget	Entry - First Pass
150007 - Pharmacy Constituency 101001-150000		Actual \$	PY Budget \$	CY Budget Input \$	Comments					
101003-150000	50005 - State Approp-ALA Cancer Resch C	-						-	-	
260002-150000	50015 - Teacher In-Service Cnt State Rev					-		-		
150000 - Pharmacy Administration	5000 - AU State Appropriations Revenue					-		-	100 C	
101002-150004	50100 - AUM State Appropriations Rev							-	-	
150004 - Pharmacy Fees	5010 - AUM State Appropriations							-		
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