Anaplan Models for Financial Planning - Training Guide

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1. Introduction

As the Product Owner, I created this training guide for the Anaplan Models project (Jan 2025 - Jul 2025) to support 10 finance teams in using five models for budgeting, forecasting, and reporting. This 2-3 page excerpt, part of an 8-page manual, was distributed in Jul 2025, ensuring 90% adoption.

2. Audience

- Analysts: Inputting budget/forecast data.

- Managers: Reviewing KPIs, generating reports.

- Admins: Managing IICS/Control-M syncs.

3. Prerequisites

- Access to Anaplan [client URL].

- Okta SSO credentials.

- Basic Excel/Power BI skills.

4. Step-by-Step Instructions

Task 1: Input Budget Data (Analysts)

- Step 1: Log into Anaplan with Okta credentials.

- Step 2: Navigate to Budgeting Model.

- Step 3: Enter Q1 2025 budget by department.

- Step 4: Save and validate against SAP data.

- Expected Result: Calculations complete in <5 seconds.

- Notes: Contact IT if data mismatches occur.

Task 2: Run Forecast Reports (Managers)

- Step 1: Log into Anaplan.

- Step 2: Open Forecasting Model.

- Step 3: Generate 12-month revenue forecast.

- Step 4: Export to Excel.

- Expected Result: Report ready in <10 seconds.

- Notes: Verify accuracy with SAP actuals.

Task 3: Monitor Data Sync (Admins)

- Step 1: Log into IICS dashboard.

- Step 2: Check SAP-to-Anaplan sync status.

- Step 3: Verify Control-M job logs (2 AM daily).

- Expected Result: Sync completes in <10 seconds.

- Notes: Escalate to IT if failures occur.

Task 4: View Power BI Dashboards (Managers)

- Step 1: Log into Power BI with Okta.

- Step 2: Open Budget Variance dashboard.

- Step 3: Apply filters (e.g., region, fiscal year).

- Step 4: Export to CSV.

- Expected Result: Charts load in <5 seconds.

- Notes: Check Anaplan data if discrepancies arise.

5. Troubleshooting

- Issue: Model errors. Solution: Validate inputs, contact IT.

- Issue: Sync failures. Solution: Check IICS/Control-M logs.

- Issue: Dashboard lag. Solution: Clear cache, retry.

6. Additional Resources

- FAQ: [client URL]/faq.

- Support: Email [client IT email].

- Feedback: Submit via Anaplan form.