 **Anaplan Reports Generator Tool - ReadMe Guide**

### 1. Preparing the Base Anaplan Report

* **Open** the base Anaplan Report (Excel file).
* Navigate to the **Data** tab:
  + Locate the **"Period Month"** column.
  + **Filter** for previous year’s data (e.g., "Dec '24").
  + **Delete** all resultant records.
  + Ensure only **current year rows** remain.

### 2. Verifying and Formatting the Options Tab

Ensure the Options tab is formatted exactly as shown below before executing the tool. Each relevant column must begin with an asterisk (\*) in the first row followed by valid entries.

|  |  |
| --- | --- |
| **Column** | **Description** |
| A | Business Framework Group (L3) - Unique values |
| B | Business Framework (L4) - Unique values |
| D | Business Framework Group (L3) repeated for each L4 |
| E | Business Framework (L4) associated with L3 |
| G | Region - Unique values |
| H | Country - Unique values |
| I | Region repeated for every Country |
| J | Country associated with Region |
| M | Last date of current month in format dd-mmm-yy (e.g., 30-Apr-25) |

Example:  
For columns A, B, D, E, G, H, I, and J, the first row must be "\*" followed by valid values.  
This setup supports dropdown filtering and is required for correct tool functionality.

* **Important Notes:**
  + Columns **A, B, D, E, G, H, I, and J** must start with a \* value in the first row below the header.
  + Columns **I and J** must contain all possible combinations of Region and Country, with Region repeated for each of its Countries.
  + Columns **D and E** must contain all possible combinations of L3 and L4, with each L3 repeated for its associated L4s.
  + Keep these combinations up-to-date. If new regions, countries, L3, or L4 levels are added, update the respective columns accordingly.

### 3. Dropdown Setup Before Execution

Before running the tool, make sure the following dropdowns (cell **B1**) in respective tabs are set to \*:

* **L3 View** tab
* **L4 View** tab
* **Region View** tab
* **Country View** tab

### 4. Running the Tool

1. Double-click on the executable file: Anaplan\_Reports\_Generator\_Tool\_KS.exe.
2. **Follow the instructions** shown in the command-line window.
3. **Respond to dialog boxes** as prompted during execution.

⚠️ Ensure the base Excel file is **closed** before you proceed.

### 5. Executing Splits (Two-Step Process)

You must run the tool **twice**:

1. **First Execution**:
   * To generate split reports based on **Business Framework Group (L3)**.
   * A folder containing these L3-based files will be created in the same location as the base file.
2. **Second Execution**:
   * To generate split reports based on **Region**.
   * Another folder containing Region-based files will be created in the same base file directory.

### 6. Tool Flow Summary

* **Step 1**: Select the base file.
* **Step 2**: Choose the sheet on which to base the split.
* **Step 3**: Enter the row number where headers start (useful in case of blank rows at the top).
* **Step 4**: Choose the column to base the split on (e.g., Business Framework Group or Region).
* **Step 5**: Confirm final selections in the dialog box.
* **Step 6**: Tool processes the file. Wait for the "File saved successfully" message box.

### 7. Output

* Two folders will be created in the same location as the base file:
  + One for **L3-split reports**
  + One for **Region-split reports**

Each file inside these folders will contain a relevant filtered version of the original base report.

**Contact**: Please reach out to kirti2.sharma@hsbc.co.in in case of issues or additional feature requests.