Anaplan

Anaplan Extensions

**Combine power and flexibility with the familiarity
of your favorite applications**

Executive summary

Enterprise planning is fast-paced, multifaceted, and cross-functional, and sharing up-to-date information and reporting accurately on key performance data is essential to intelligent decision-making. Yet creating and consuming accurate reports offline can prove burdensome—out-of-date information and inconsistent formatting can negatively impact productivity and credibility, causing unnecessary extra work.

With Anaplan, you can extend the capabilities of Connected Planning to your favorite applications for precise, reliable reporting and planning. Anaplan offers extensions for Microsoft Excel, PowerPoint, Office 365 and Google Sheets to help users report, present, and collaborate with Anaplan data from their preferred third-party applications.

Plan with efficiency using Anaplan Extensions

While the Anaplan platform significantly unifies and streamlines modeling and planning, many organizations also leverage third-party tools such as Microsoft 365 Add-ins for Excel, PowerPoint, Word, and Google Sheets Add-on in tandem to share information with non-Anaplan users that aids in decision-making.

With Anaplan Extensions, planners, analysts, and decision makers can work with Anaplan data directly within these productivity tools to streamline planning and analysis processes, as well as broaden collaboration with non-Anaplan users across the company. Selecting from several available extensions, planners across the organization can create reports more efficiently and perform ad-hoc analysis seamlessly.

Key benefits of Anaplan Extensions
Seamless one-click access to data from a single source of truth

- Create point-in-time, up-to-date, and trustworthy reports and ad hoc analysis using Anaplan data

- Save time quickly creating and refreshing reports

- Work offline with Anaplan data and contribute directly to Anaplan from third-party tools

- Drive increased collaboration with non-Anaplan users for reporting and ad-hoc analysis

- Take advantage of native modeling, formatting, and styling capabilities

- Quickly create ad hoc analysis by connecting with data from the UX, with the flexibility and familiarity of your preferred third-party tools

Experience the power of the Anaplan platform in a familiar territory

Anaplan Extensions combine the powerful capabilities of the Anaplan platform with the familiarity and convenience of today's popular productivity tools. Teams can save time and collaborate more efficiently with flexible connection points, offline access, and a single source of truth.

Accessible
Experience seamless minimal-click access to data from a single source of truth

Connected
Stay connected to colleagues and data with flexible connections and offline accessibility

Efficient
Save time with easy, efficient ad-hoc analysis and customizable reports

Anaplan for Microsoft 365 (AM365)

A single extension, Anaplan for Microsoft 365 (AM365) lets users extend their reporting and analytics power to three Microsoft applications: Excel, PowerPoint and Word (browser and desktop). Extend the Anaplan platform into Excel for fast, accessible ad hoc analysis to perform calculations combining data from multiple data source with Anaplan UX cards as data. Leverage the power of the Anaplan platform in PowerPoint and Word for fast, accessible reporting by designing and enriching presentations with Anaplan UX cards as images.
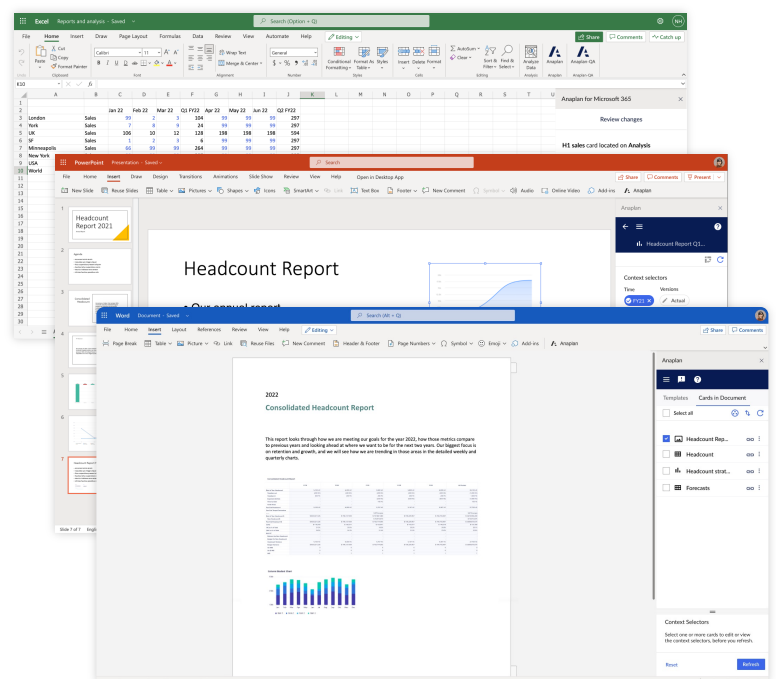
- Enhance reports and presentations by adding UX cards from different models as images or data into slides and workbooks

- Perform fast, flexible ad-hoc analysis with multiple connections per sheet, always connected, refreshable and customizable

- Share and collaborate with colleagues and non-Anaplan users using trusted data

- One-click write-back of Excel data into Anaplan by making changes to writable cells in grid cards

Brand marketing system empowers non-technical users to connect, retrieve and analyze data for insights.

"AM365 is powerful with large grids, has an intuitive user interface, and offers multiple retrievals in a single worksheet, especially inserting data from multiple models."
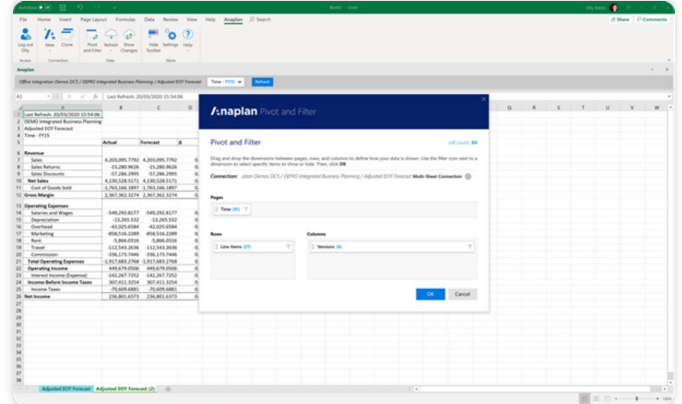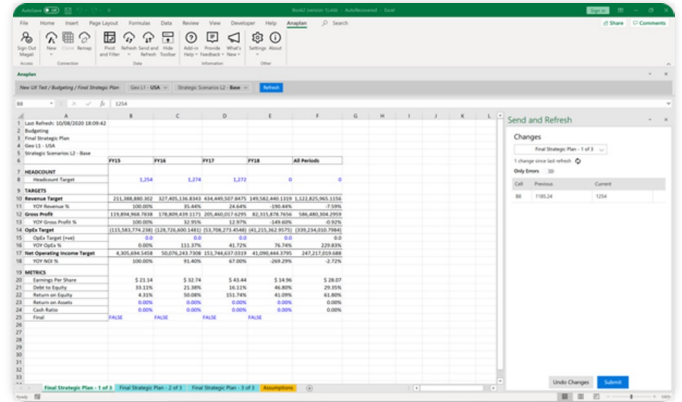
- Sr. Manager, Finance Systems & Business Intelligence

Anaplan Add-in for Excel

Planners and analysts can use the Anaplan Add-in for Excel to collaborate, report , and analyze more efficiently in desktop Excel applications using Anaplan data. The multi-sheet connection eliminates the need for tedious manual data transfer, allowing users to easily create and refresh reports with the latest Anaplan data and sync data fast.
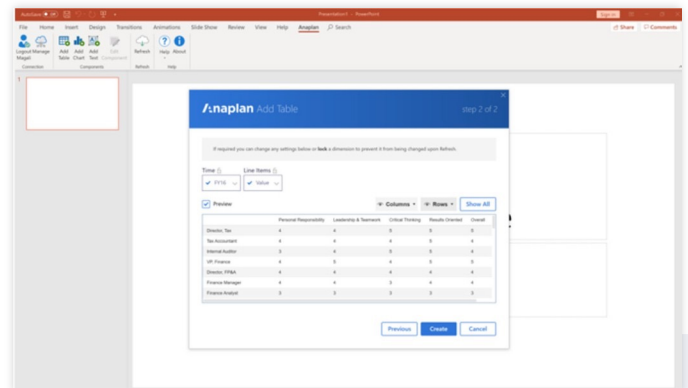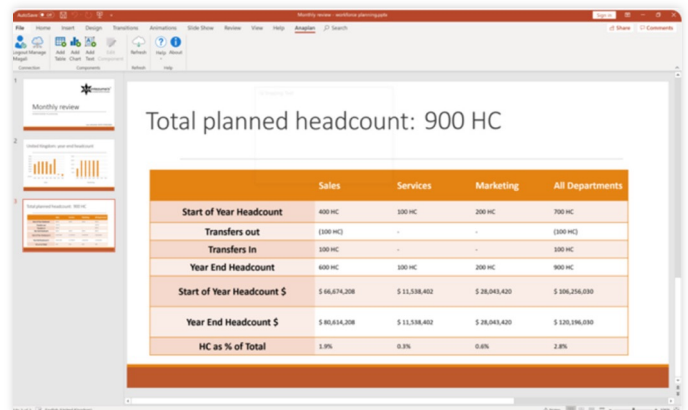
- Speed up planning in Excel with faster data analysis and report creation connecting with Anaplan module data.

- Refresh your connections in one click

- Align decisions across all company stakeholders sharing up-to-date planning data

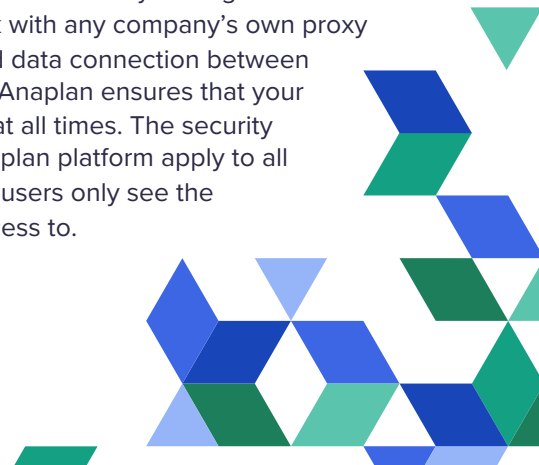## Anaplan Add-in for PowerPoint

Teams can use the Anaplan Add-in for PowerPoint to create robust, highly visual presentations in desktop PowerPoint applications using Anaplan data. Users can create PowerPoint charts, tables, and text components to smoothly create reports in the format of their choice. Minimal-click refreshes ensure that reports always incorporate the latest data for highly accurate, visualized reports.

- Create powerful presentations with Anaplan model data

- Incorporate Anaplan modules data into PowerPoint presentations for highly visual, accurate data views and reporting

- Smoothly create and format PowerPoint slides using Anaplan charts, tables, and text components

- Minimal-click refreshes speed processes to save time

- Save time and speed up processes with pre-saved templates from Anaplan

Anaplan Add-on for Google Sheets

The Anaplan Add- on for Google Sheets enables users to analyze, report, and collaborate efficiently with Anaplan when using Google Sheets. Anaplan users can analyze data in their familiar tool to create their standard company reports and to collaborate with colleagues.

- Connect Google Sheets to Anaplan to let data flow more efficiently with minimal manual effort

- Keep Anaplan as the planning source of truth while producing flexible reports and analysis in Google Sheets

- Report on data with simplicity and ease, customizing and formatting Anaplan data with preferred styling

- Collaborate with other Google Sheet users

- Send and refresh data with write-back capabilities

Additional features include:

- **UX cards connection**
  End users can connect directly to tailored UX views from their card template library. Available in AM365.

- **Saved view connection**
  Connecting to Anaplan saved views enables end users to leverage pre-built reports for quicker reporting and execution. Saved views are controlled by model builders who understand the business needs and apply pre-existing filters in Anaplan. End users can connect directly to tailored views to access to the most important information. Available in Excel and Google Sheets.

- **Module connection and pivot and filter**
  Connecting to a module gives end users full flexibility to select the data they want to see. Then, slice and dice data according to your needs and reduce the dependency on model builders. All users can quickly create reports with the information they need in the format they want to see it in. Build personalized reports by pivoting the dimensions to present data in your preferred format. Filter data to only display relevant list items. Available in Excel and Google Sheets.

- **Refresh one or all connections**
  Save time preparing reports with an easy way to refresh data. Point-in-time connections let you refresh your connection in just a click, satisfying static reporting needs and keeping reporting cycles up to date. Refresh all or several connections at once. Available in AM365, Excel Add-in and Google Sheets Add-on.

- **Multi-sheet connection**
  Meet complex reporting needs automatically by creating multiple worksheets from a single connection. This capability is particularly useful when dealing with reports that have one sheet per geography or cost center. Instead of refreshing each sheet manually, you can refresh all sheets in one action. It's often used to present large data sets organized by worksheet. Available in Excel.

- **Formatting and styling**
  Apply Anaplan data formatting and styling or leverage your tool's native options for pixel-perfect reports. Data can either be formatted as per the module settings or the Excel and Google Sheets formats can override this. Styling from Anaplan can be applied in Excel and Google Sheets to reflect summary or heading line items. End users can also apply their own styling. Formatting and styling are retained even after refresh.

- **Add rows and columns**
  Seamlessly insert rows and columns to your report for commentary or ad-hoc calculations. Your report will refresh with new Anaplan data while conserving your rows and columns. Available in AM365, Excel Add-in and Google Sheets Add-on.

- **Read/write connection**
  Create modules or saved view connections that can be edited in Excel (AM365 and Excel add-in) and Google Sheets, which can then be written back to Anaplan. Data validation occurs prior to write-back to help prevent any user errors. Impacts are visualized immediately thanks to the subsequent data refresh.

- **Tables, charts, and text components**
  The Anaplan for PowerPoint within AM365 offers a collection of native tables, charts and text components to help users create high-impact visual decks in their preferred formats. Text components enable you to embed Anaplan data as part of a sentence or heading. Various types of charts are available to meet your visualization needs and all components can be styled using PowerPoint's native capabilities.

- **Installation and upgrade**
  AM365 can be added directly from Microsoft add-in store. New versions are automatically rolled out, always giving users access to the latest version automatically. The Anaplan for Google Sheets Add-on can be added directly from the Google marketplace in a few clicks, and new versions are automatically rolled out without any impact on the user. PowerPoint and Excel Add-ins can be easily installed on local machines. In-product notifications indicate when a new version is available.

- **Security**
  Anaplan data is accessed securely through extensions with the option to apply your company's network settings. Single Sign On (SSO) access is provided to AM365, Excel and PowerPoint add-ins ad Google Sheet Add-on. Proxy settings enable the extensions to work with any company's own proxy settings. Encrypted data connection between the extension and Anaplan ensures that your data stays secure at all times. The security settings of the Anaplan platform apply to all extensions so end users only see the data they have access to.

About Anaplan

Anaplan, Inc. (NYSE: PLAN) is a cloud-native enterprise SaaS company helping global enterprises orchestrate business performance. Leaders across industries rely on our platform—powered by our proprietary Hyperblock® technology—to connect teams, systems, and insights from across their organizations to continuously adapt to change, transform how they operate, and reinvent value creation. Based in San Francisco, Anaplan has over 20 offices globally, 175 partners and approximately 1,600 customers worldwide.

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