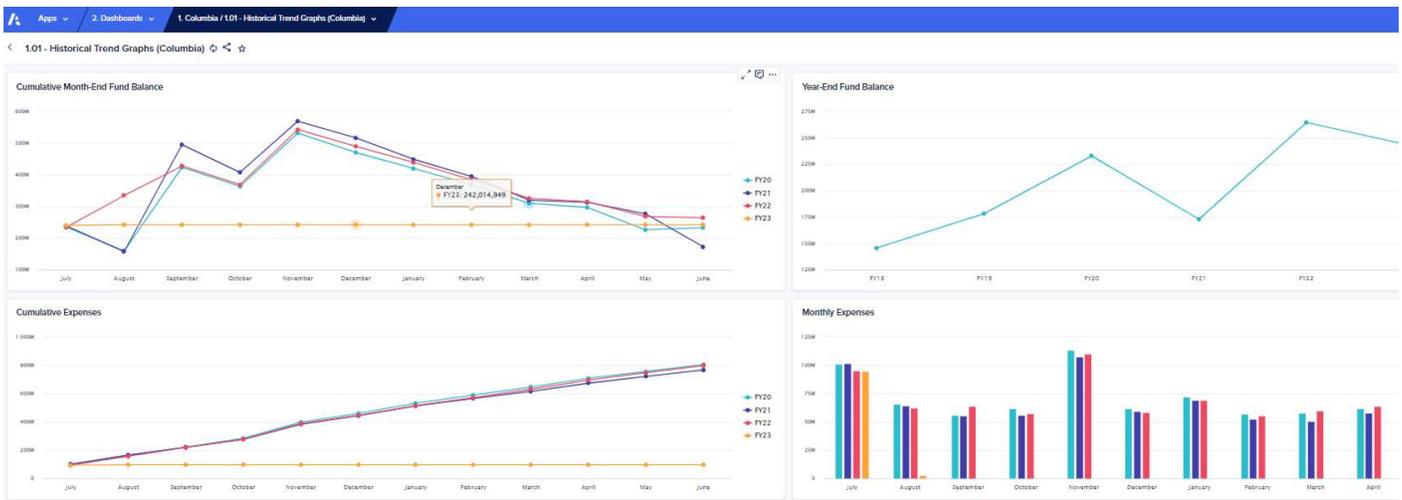


# Introduction to Anaplan



## General Overview

Anaplan is a cloud-based platform that allows organizations to model what-if scenarios, review past and current performance in real time, and forecast future outcomes. By strengthening the planning of a business, Anaplan unlocks continuous, collaborative processes that drive better decision-making and business performance.

## Anaplan's Role at The University

The University will leverage Anaplan for several budgeting and financial use cases including reporting, dashboard views, budget development, and scenario modeling. Additionally, Anaplan will be used for several existing business processes such as support unit initiative requests, academic unit blueprints, and unit reviews.

Specific to academic units, Anaplan has been designed with an academic unit scenario modeling application. This will allow academic units to model the financial impact of various scenarios including new programs.

The reporting and dashboard views of Anaplan are not intended to replace current systems such as the Finance Intranet or PeopleSoft queries. Rather, it is designed to give units a different way of viewing their finances.

## Anaplan Access

Generally, Anaplan will only have one user per UofSC operating unit, which will be assigned to the Business Manager and/or Budget Office contact for each unit.

## **User Roles**

Each Anaplan User will be assigned a User Role when set up within the USC Anaplan Workspace. User Roles govern Anaplan Page access, which helps ensure that each user has the information that is relevant to their unit. Current user roles include:

- 1) Workspace Administrators
- 2) Osborne Users
- 3) Support Unit Users
- 4) Academic Users
- 5) System Institution Users
- 6) Provost Users
- 7) Palmetto College Users

## **Timing of Anaplan Rollout**

The Anaplan rollout will begin in early Fall 2022 and continue progressively through Spring 2023. New Apps and Pages will be released monthly as we move through the FY2023 fiscal year.

## **Support and Training**

The Budget Office has developed training guides for each section of Anaplan. Throughout FY2023, the different sections of Anaplan will be rolled out. Before each section is released, the Budget Office will send the training guides to the units who are part of that section's rollout. The Budget Office will also host training webinars during those same time frames.

## **Frequently Asked Questions**

1. **Q:** Who will receive access to Anaplan?

**A:** Generally, only business managers listed on the Budget Office contact list will be given access.

2. **Q:** What should I do if the person designated as the Anaplan user within my unit leaves the university or changes roles?

**A:** Please contact your Budget Office analyst to update your unit's Anaplan user.