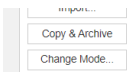# A guide: How to tidy up any Anaplan model
by James Bryson (jbryson@lionpointgroup.com)

Recommended model building skill level: Certified Solution Architect

1. Make backups

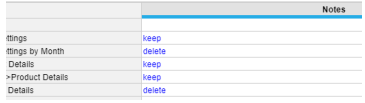Import...
Copy & Archive
Change Mode...

Add a revision tag (if in ALM) and copy-archive before anything else and at regular points throughout this exercise. It will keep you covered in case something doesn't go to plan.

2. Start with your pages/dashboards

It's really important to work with your users here. A front to back approach ensures all key user functionality is preserved.
- Remove any unused pages, cards, worksheets or action buttons.
- For all pages: note down all output modules and actions that are published as grids/charts/kpi's (I personally like to use notes in module/action settings here).

	Notes
ttings	keep
ttings by Month	delete
Details	keep
>Product Details	keep
Details	delete

3. Tidy up your actions

- Now you can delete any unused processes & actions (eg those not published to pages or dashboards, those not used by model builders or those not being used by any integrations).
- I also like to add all imports/exports to processes as it makes it easier to spot new actions that may appear in the future (by checking the "Used in processes" column in Settings -> Actions).
- Apply a consistent naming convention and sort the actions. Coding also helps to easily identify the processes that actions belong to and the run orders within them.

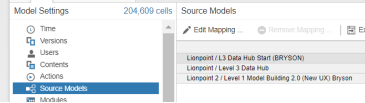| Imports	
QUO03 Quota Assumptions from Quota+Assumptions.csv	one off load - to delete
QU08 Rep Assignment to Acco from CYW+Sales+Reps+to+Accounts.	one off load - to delete
G4T Territory>Account# from CYW+Scenario+Territory+to+Accoun	one off load - to delete
DAT01 Baseline Forecast from Baseline+Financial+Forecast.csv	one off load - to delete
TAR02 Account Review from Account+Review+CYW+Scenario.csv	one off load - to delete
TAR02 Account Review from Account+Review+CYW+Scenario (1).cs	one off load - to delete

4. Refine your data sources

- Now we've kept only the actions that we really need, we can delete all the sources that have no import actions related to them (see Settings -> Actions -> Import Data Sources).
- I also like to take the opportunity to re-map all internal imports to be sourced from saved views (ensuring no actions are sourced by modules or lists).
- Checking that all imports with 'file' source types are available to admins is another useful thing to do at this point as it ensures admins can inspect these imports in the future. Note that you may likely need to create new imports and this will require having the right source files to hand.
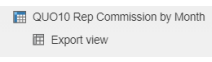
5. Check source models in all other models

- Check all other models that use the model you're tidying up as a source in Settings -> Source Models.
- Note the exact sources each model refers to in Settings -> Actions -> Imports (saved views/modules/lists).
- Make a note of any import actions in these other models that do not source from saved views (eg may be sourcing directly from a module or list) so that they are addressed when you tidy up these other models at a later date.

Model Settings — 204,609 cells — Source Models
- Time
- Versions
- Users
- Contents
- Actions
- Source Models
- Modules

Source Models
Lionpoint / L3 Data Hub Start (BRYSON)
Lionpoint / Level 3 Data Hub
Lionpoint 2 / Level 1 Model Building 2.0 (New UX) Bryson

6. Refine your saved views

- Referring to both the Source Object column in Settings -> Actions -> Imports and the output modules earlier identified in all pages / dashboards will make it easy to identify what most of your existing saved views are being used for.
- Test all export actions and the modules / views that they are using. If unsure then re-create the export from a dedicated saved view.
- It's now time to apply a consistent naming format to all views that you need to keep. Make it clear what the purpose is, eg: import / export / output / check (changing view names won't affect imports).
- While you are doing this it is always worth checking and (if required) fixing any filters in these views.
- Now delete any unused saved views.

QUO10 Rep Commission by Month
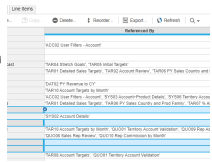Export view

7. Review your modules

Now is a good time to do a general review of all modules.
- Ensure all modules are assigned to functional areas. The objective should be to generate a logical model map by functional area.
- Ensure your module naming & coding is consistent and in line with DISCO.

8. Refine your modules

Now is time for the fun bit as you are now in the perfect position to start cutting out redundancies from your model.
- Go to Settings -> Modules and delete all modules with no references, no saved views and no filters (be careful here - eg look out for flags / booleans as a sign).

9. Refine your line items

- Now we need to identify redundant line items within the existing modules.
- Go to Settings -> Modules -> Line Items.
- Review each module in this order of module type: Output, Calculation, System, Input, Data.
- Identify all un-referenced line items.
- Keep any line items that are required for any filters or are included in any saved views.
- Now here's the fun bit - as the more you delete, the more references disappear. So keep repeating steps 8 & 9 until you can no longer delete anything else.

Line Items
Refresh
Referenced By
TAR10 Account Targets by Month', 'QUO01 Territory Account Val
Account Country, Code Import, 'TAR10 Account Targets by Month
Territory Country, QUO01 Territory Account Validation: Territory, '
QUO01 Territory Account Validation: Territory Country, 'QUO09 R
QUO01 Territory Account Validation: Account Country

LIONPOINT