



SPS COMMERCE
INFINITE RETAIL POWER™

ANAPLAN USER STORY ACTIONS

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About SPS Commerce.

We are retail onboarding experts specializing in EDI, integration, analytics, sourcing and product content. We make solutions for retailers, suppliers, distributors, grocers & 3PLs/logistics.



SPS' HISTORY WITH ANAPLAN

- Excel spreadsheets
- Finance Budget & Forecasting
- Income Statement – focused on detailed expense input
- Build in fall 2015 with January 2016 Live
- Currently building out detail to forecast revenue
- Limited use of Actions was part of initial build

ANAPEDIA

Actions

Actions enable you to automate routine tasks such as:

- **Processes:** Run, edit or delete a process (a Process is a sequence of Actions).
- **Imports:** Run, edit, and delete imports as well as mark imports as production data.
- **Import Data Sources:** Create, edit, and delete import data source definitions or mark them as production data.
- **Exports:** Saved exports can be run, edited, or deleted.
- **Other Actions:** including create and maintain actions that are specifically for use with **numbered lists**.

Other Actions

There are a number of other actions you can configure:



- **Open Dashboard.** Takes users to another dashboard. You can configure this action to open different dashboards, depending on the item selected in a context list on the launch dashboard before the action button is clicked.



- **Delete from list using selection.** This action is especially useful for deleting items from very large lists.

Actions for use with Numbered Lists

Some of the other actions are designed specifically for use with **numbered lists**:



- **Create.** Creates a new item and optionally jumps to another dashboard (to complete details for example).
- **Assign.** Allows you to edit the selection assigned to a parent item.
- **Delete Branch.** Deletes an entire branch of a hierarchical tree from the selected item downwards.
- **Copy Branch.** Allows you to copy one or more parent items, including its children and data. It works with numbered lists that have a parent hierarchy.

EXAMPLES

+ Add Training Detail	Create
Go to Marketing Expense Planning	Open Dashboard
+ Add Marketing Expense	Create
+ Add CapEx Line Item	Create
Open AWS Dash	Open Dashboard
+ Add New RI Purchase	Create
Go to Marketing Event Planning	Open Dashboard
+ Add New Employee	Create
+ Add Consulting Expense	Create
+ Add Contract Labor Expense	Create

- “Go To” & “Open” allow movement between dashboards
- “+” Add to numbered lists
- No “-” allowed to users as could easily impact prior versions when deleting from a numbered list
- How do we manage this “extra” data?

MANAGING OUR LARGE LIST: EMPLOYEES

Delete from List using Selection

This action is useful if you want to delete items from a very large list - one that contains thousands of items for example.

There are two methods of deleting items from a list:

- [Create a control module with a delete flag](#)
- [Use a formula](#)

MODULE WITH FORMULA TO CREATE DELETE FLAG

Provides visibility to what will be deleted

Employees List Deletions

Last Payroll Date: 'Employees (#).Last Payroll'

	Last Payroll Date	Delete?
-Nov	2/29/2016	<input checked="" type="checkbox"/>
-Ros	7/31/2017	<input type="checkbox"/>
-Des	7/31/2016	<input type="checkbox"/>
-Joh	1/1/2016	<input checked="" type="checkbox"/>
-Mar	8/3/2015	<input checked="" type="checkbox"/>
-Bra	7/31/2017	<input type="checkbox"/>
-Cha	2/28/2017	<input type="checkbox"/>
-Bar	6/30/2017	<input type="checkbox"/>
-Um	7/31/2017	<input type="checkbox"/>
-Ge	7/31/2017	<input type="checkbox"/>
-Mill	6/30/2017	<input type="checkbox"/>
-Rot	2/16/2016	<input checked="" type="checkbox"/>
-Job	1/1/2016	<input checked="" type="checkbox"/>
-Jon	7/31/2017	<input type="checkbox"/>

Employees List Deletions

Last Payroll Date: 'Employees (#).Last Payroll'

	Formula	Parent	Is Summary	Format	Applies To
employees List Deletions					Employees (#)
Last Payroll Date	'Employees (#).Last Payroll'		<input type="checkbox"/>	Date	-
Delete?	Last Payroll Date <= DATE(2016, 6, 30) AND ISNOTBLANK>Last Payroll Date)		<input type="checkbox"/>	Boolean	-

CREATE ACTION AND RUN

- Name the action
- Delete from list
- Using the Boolean line in the module
- Before & After Check
- Select and RUN!

Delete From Employee List ✕

* Delete Items from:

* Selected using:

Actions

Actions Imports Import Data Sources

	Action
CCR Actual Load from CCR Actual Historical Data.txt	Import into CCR Actual Load
Exports	
Other Actions	
Go To P&L Summary	Open Dashboard
Delete From Employee List	Delete from List using Selection
Search GL Details	Open Dashboard

RESULTS

- In a few seconds deleted
 - ~600 inactive employees from list
 - 41,063,172 cells related to these employees in some of our largest modules
 - 2% of total model cells
- Before & After check on Income Statement showed insignificant \$ impact
- Successful cleanup of un-needed model data saving time and space

DISCUSSION

- Does anyone use any of the other action features not discussed here?
- Anaplan experts comments?
- Topics for future User Story?