

Quick Guide

Model Optimization

 anaplan

Optimizing Lists

Questions		Answers	Planual
Does it have a top level?	Is necessary for each list?	Remove if not necessary, ex: Currency or transactional lists; Having a Top Level without other parents in the list makes selective recalcs expensive	1.05-06 - 07 5.07-09
How is it built?	Does it use Time as part of the key?	Remove and use time references outside of the list itself	1.05-11
	Does it use a Combination of Properties?	This taxes the system unnecessarily and leaves the numbered list without a true code	1.05-04
	Do they have a code?	All lists should have a code associated to them	1.05-02
Does the list use properties?	What is the use case for the property?	Remove any properties that do not meet the below use cases <ol style="list-style-type: none"> 1. Display Name for numbered lists 2. Creating actions off numbered lists 3. Export labels 4. Facilitate navigation to different dashboards (old UX) 5. Creating driver and dependent list 	1.05-03b – 3e
Are there subsets on the list?	Are the properties being used?	Look in the 'Referenced By' column. If Reference By column is blank, then they are most likely only used for combination of properties (see above)	1.05-03a – e & 1.05-12 1.06-02 - 3
	How big is the list itself?	Subsets on large lists will cause performance problems and should be avoided. Subsets add to the overall size of the model and are adding additional aggregations. Pre-allocations on short lists (when users can modify list members (add/remove) could be a hidden expense.	1.05-03a – e & 1.05-12 1.06-02 - 3
	Is the naming convention followed?	Prefix the subset with the name of the list (e.g. P3 Products: Active Products) Anapedia Link	1.06-01

Optimizing Actions, Process, & Data Sources

Questions		Answers	Planual
What actions exist in the module?	Are all the actions necessary?	Put all necessary actions in a process to ensure it in not deleted and remove any actions that are obsolete (<i>Check in 'Used in Process'</i>)	5.01-04
	Are all the actions clean?	Put only the line items needed in a saved view for that action and ensure there are no errors (all green checks)	5.04-04 – 7 & 5.04-09
What do the data sources look like?	Do 'list' or 'model' sources exist?	Sources should always be saved views to improve performance by only pulling data that is needed and only bring in delta.	5.04-08
	Is there an action associated?	Delete any data sources that are not associated to an action	5.03-01
	Default Source Label	Clean the Source Label so it is more meaningful	5.06-01
Import Data Sources	Is there a Naming Convention?	Rename the Import Sources as soon as possible	5.06-01

Optimizing Modules

Questions		Answers	Planual
What dimensions are used?	Are all of them necessary?	Remove any dimensions that are not needed	
	Can a Time Range be used?	Models with excessive Time Calendars, can modules benefit using Time Ranges.	1.01-07
	Are they in a consistent order?	Place dimensions consistently across your modules to limit the processes power needed (Community Link)	2.01-11
Are there any saved views?	Do they use the correct filtering?	Filters should be based on Boolean values (one per tab)	2.04-02 & 4.02-01
	Are all the line items in the view necessary?	Remove any that are unnecessary	N/A
		Use the 'Show' on desired columns instead of 'Hide' on non-desired so new line items are not added to the saved view	N/A
Default View clean?	Is the default view clean, meaning no filters, no conditional formatting, no hiding of line items	2.04-03	
What line items are present?	What formats are the line items?	<ul style="list-style-type: none"> Can the summaries be turned off? Are text line items over used? 	2.03-01 & 2.03-02
	Number of line items?	Best practice is to have < 50 per module	
	Can the formulas be improved?	Look for line items that can be placed in a Systems module and looked up instead to improve performance <ul style="list-style-type: none"> parent(parent(parent(line item))) etc. Text field concatenations Excessive finditem() – can a lookup work? Check for nonblank before Finditem() Time functions (ex: start(), currentperiodstart/end(), etc.) Let the FIND() function do the heavy lifting and then use MID to get the result which is better than left(right()). 	2.02
		Remove formulas that are being calculated in multiple modules and any daisy chains. Create one source of truth and reference that across the model	2.02-19
		Look for long/lengthy formulas to be optimized <ul style="list-style-type: none"> Simplify complex IF THEN ELSE statements and put the most common condition first (early exit) It's better to add additional columns with less complex formulas to simplify the overall statements (break it up) 	2.02-17 & 2.02-18
	Are there excessive subsidiary views?	Create new modules instead of using subsidiary views where possible	2.01-06
	Are any referencing list properties?	Remove them as it leads to double counting of line item size. If they are necessary, make sure they are in the same format	1.05-03a
	Does the module use any of the 6 key poor performing functions?	Rework the below functions: <ol style="list-style-type: none"> Sum/Lookup combination Textlist() Selects (especially with time) Hard coded items Conditional formatting with summaries turned on 	1. 2.02-08 2. 2.02-11 3. 2.02-14 4. 2.02-12 5. 2.03-01
	Are there clear line/header items?	Format to 'No Data'	2.03-03