Working with Anaplan's New UX
My Pages Build Guide for End Users

Want to build along in your own workspace with the Working with Anaplan's New UX eLearning?
Follow the steps below to build personal pages that are demonstrated in the training course within My Pages in the New UX.

Prerequisites:

Before you begin to build in the New UX:

- Log in to Anaplan.
- If you have access to more than one workspace, choose the workspace you will use for this training.
- **You must have access to the New UX Training Model v2**. Search for it on the Models launchpad. **If the model is not already in your workspace...**
    - If you have Workspace Administrator (WSA) rights, download the New UX Training Model v2 to the workspace that you will be using. **Ensure that you are using the v2 version** as this will match the current release of the eLearning. This is a very small model and will not take up much space. Use the Manage Models options to rename or make a copy of the New UX Training Model v2. Rename it with your own name as "Your Name – New UX Training Model v2." In the instructions that follow, always select your personal copy of this model when asked to choose a model.
    - Ask a colleague who has Workspace Administrator (WSA) rights to download the model to the workspace, or contact Support@anaplan.com for help to download the model.
- Once you have confirmed the model is in your workspace, continue with the training below.
- Optional: Orient yourself to this model – its purpose, content, and schema – with this Model Overview found at the end of the Build Guide.

Ready to start building in the New UX? Use the steps below to build the pages that are demonstrated in the Working with Anaplan's New UX eLearning course.

Open the New UX/My Pages

☐	Log in to Anaplan.	*Use your existing log-in method and credentials.*
☐	From the menu in the upper left corner, select **My Pages**.	*(Will open My Pages landing page.)*
	Note: Once an app has been created in the New UX that uses models to which you have access, you can also build personal pages within that app. In that case, select **Apps** from the menu in the upper left corner; then select the app.	

Create the Monthly Employee Expense Summary board

Begin the page

☐	Click **Create a page**.	
☐	Click **Board**.	
☐	Enter **Page name**.	*Overwrite default ("Untitled – date, time"); Type "Monthly Employee Expense Summary."*
☐	Select a workspace from dropdown.	*Select: the workspace containing Your Name - New UX Training Model v2.*
☐	Select a model from dropdown.	*Select: Your Name – New UX Training Model v2.*
☐	Skip **Category (optional)**.	*(This is only visible when working in Apps, not My Pages.)*
☐	Click **Create**.	

Add a grid card

☐	Drag **Grid** card onto empty board.	*Drag or double-click a card to add it to the Board.*
☐	Click **Configure grid**.	
☐	Select data source.	*On the Custom views tab, select the HR04 Employee Expenses module. You will see a preview of the default module view.*
☐	Customize the view.	*Click the pivot icon in the grid toolbar.*
☐	Pivot the view.	*In the Pivot data dialog, arrange the dimensions as follows:* *Context selectors: Time, Versions* *Columns: E2 Employee#* *Rows: Line Items* *The grid preview will adjust as you pivot. Do NOT click Next yet.*
☐	Select levels for Employees.	*In the Pivot dialog, click the Show/Hide icon (eye) for E2 Employee#. In the Levels section, Deselect E2 Employee#.*
☐	Click **Apply**.	*The preview will show only data for Regions and Total Company.*
☐	Click **x** to close dialog.	*The x is located in the upper right of the Show Summary dialog.*

☐	Continue to customize the view.	*In the grid toolbar, click the Show/Hide icon (eye) on the toolbar.*
☐	Select items for Line Items.	*Click Line Items. In the Items section, Select Headcount, Salary, and Total Employee Expenses.*
☐	Click **Apply**.	*The preview will show only the data for the selected Line Items.*
☐	Click **Next**.	
☐	Enter **Title**.	*Type "Regional Comparison."*
☐	Enter **Description**.	*Type "Compare regional totals"*
☐	Skip **Link to a page** dropdown.	*(Do not link to a page. This will only be available for My Pages within an app.)*
☐	Skip **Allow editing.**	*(Do not enable Users to enter and edit data.)*
☐	Skip **Hierarchy filters for Columns**.	*(Do not enable hierarchy filter for Columns.)*
☐	Click **Add**.	*(Adds the card to the page.)*
☐	Click **Publish**.	*(Publishes the page.)*

Add a chart card

☐	Click **Edit icon** (pencil) on page.	*(Enter designer mode.)*
☐	Drag **Chart** card into any gray drop zone on the board.	*Drag or double-click a card to add it to the Board.*
☐	Click **Configure chart**.	
☐	Click **View designer**.	*(Access the View designer from the Overview tab of the Card Configuration panel.)*
☐	Select data source.	*Click Module views to use a saved view. Click HR04 Employee Expenses to expand to see view names. Select: NUX Monthly Headcount and Employee Expense chart.*
☐	Click **Update**.	*(Returns you to the Overview tab of the Card configuration panel.)*
☐	Enter **Title**.	*Type "Monthly Trend."*
	Enter **Description**.	*Type "Headcount, Salary, and Total Employee Expense by month."*
☐	Skip **Link to a page** dropdown.	*(Do not link to a page. This will only be available for My Pages within an app.)*
☐	Select **Chart type** from dropdown.	*Select Combination.*
☐	Click on the **Chart** tab of the Card configuration panel.	
☐	Select **Series** options.	*Headcount: Aqua, click chart type icon and select Column, click right axis icon* *Salary: Violet, Line* *Total Employee Expenses: Red, Line*
☐	Select **Axis** options.	*Left axis: Type "$US"* *Right axis: Type "Headcount"*
☐	Select **Labels** options.	*Legend position: Top* *Chart font size: Default* *Show data labels: off*

☐	Skip **Data** options.	*(Do not enable Plot trailing zeros.)*
☐	Click on the **Context** tab of the Card configuration panel.	
☐	Skip **Hierarchy filters** for **Columns**.	*(Do not enable hierarchy filter for Columns.)*
☐	Skip **Context Selectors** for the card.	*(Do not change default settings for E2 Employees# and Versions. By default, context selectors for the card are sync'd with page and do not display on the card.)*
☐	Click **x** on Card configuration panel.	*(Closes the Card configuration panel.)*
☐	Click **Publish**.	*(Publishes the page.)*

Adjust layout

☐	Click **Edit icon** (pencil) on page.	*(Enter designer mode.)*
☐	Move Monthly Trend chart card.	*Grab chart using handle in the top center of the card and drag to new position in same row as Regional Comparison grid card, on the right side.*
☐	Expand the height of the row.	*Hover mouse at the bottom of the row containing the cards. Drag blue bar down to achieve desired row height.*
☐	Redistribute horizontal space between two cards.	*Hover mouse between the cards. Drag blue bar one grid position to the left.*
☐	Optional: explore layout choices.	*Drag more unconfigured cards onto board; arrange them.*
☐	For any unconfigured cards: select **Delete** from **ellipsis** (…) dropdown.	*Delete unconfigured cards before publishing the page.*
☐	Click **Publish**.	*(Publishes the page.)*

Change context selector options

☐	Click **Edit icon** (pencil) on page.	*(Enter designer mode.)*
☐	**Hover** over Regional Comparison grid card.	*(Reveals card's Edit icon and ellipsis.)*
☐	Click **Edit icon** (pencil) on Regional Comparison grid card.	*(Opens Card designer.)*
☐	From within the Card designer, click **Settings icon** (cog) to adjust context selector options for the card.	*Version dimension: (no change from default)* *Sync with page: On (green)* *Show on card: Off* *Time dimension:* *Sync with page: **Off** (gray)* *Show on card: **Selector*** *(Click outside the dialog to close it.)*
☐	Click **Update**.	*(Updates the card)*
☐	(Optional) **Hover** over Monthly Trend chart card.	*(Reveals card's Edit icon and ellipsis.)*
☐	(Optional) Click **Edit icon** (pencil) on the Monthly Trend chart card.	*(Opens Card configuration panel.)*

☐	(Optional) In the Card configuration panel, click the **Context** tab.	*(Opens Context tab.)*
☐	(Optional) Click the **Settings icon** (cog) to adjust context selector options for the card.	*E2 Employee# dimension:* *Sync with page: On (green)* *Show on card: **Label*** *Versions dimension: (no change from default)* *Sync with page: On (green)* *Show on card: Off* *Click **x** to close the Card configuration panel.*
☐	From within the Board designer, click **Settings icon** (cog) to adjust context selector options for the overall board.	*Version dimension: (no change from default)* *Show on page: Selector* *Organization dimension:* *Show on page: Selector* *Click Show/Hide.* *In the Show/Hide panel, deselect E2 Employee#.* *Click Apply.*
☐	Click **Publish**.	*(Publishes the page.)*

Create the Product Analysis board

Begin the page

☐	Select **< Back to My Pages** from the navigation tab dropdown.	*Use navigation tab on the right to navigate to the My Pages landing page (or navigate to Apps landing page if building within an existing app).*
☐	Click **Create a page**.	
☐	Click **Board**.	
☐	Enter **Page name**.	*Overwrite default ("Untitled – date, time"); Type "Product Analysis."*
☐	Select a workspace from dropdown	*Select: the workspace containing Your Name - New UX Training Model v2.*
☐	Select a model from dropdown	*Select: Your Name – New UX Training Model v2.*
☐	Skip **Category (optional)**.	*(This is only visible when working in Apps, not My Pages.)*
☐	Click **Create**.	

Add two grid cards

☐	Drag 2 **Grid** cards onto empty board.	*Place both cards in the same row*
☐	Click **Configure grid** on left card.	
☐	Select data source.	*On the Module views tab, click REV03 Product Analysis to expand to see view names. Select: NUX Product Sales summary grid.*

		OR practice customizing your own view: On the Custom views tab, select the REV03 Product Analysis module. You will see a preview of the default module view.
☐	**If you are using the Custom view tab**, continue with the steps below to customize the view.	*Click the pivot icon in the grid toolbar.*
☐	Pivot the view.	*In the Pivot data dialog, arrange the dimensions as follows:* *Context selectors: Line Items, Versions* *Columns: Time* *Rows: P2 Product* *The grid preview will adjust as you pivot.*
☐	Select levels for Products.	*Click the Show/Hide icon (eye) for P2 Product. In the Levels section, deselect P2 Product.*
☐	Click **Apply**.	*The preview will show only data for Categories and All Products.*
☐	Click **x** to close dialog.	*The x is located in the upper right of the Show summary dialog.*
☐	Continue to customize the view.	
☐	Select levels for Time.	*In the grid toolbar, click the Show/Hide icon (eye). Select Time. In the Levels section, deselect Time (Details).*
☐	Click **Apply**.	*The preview will show only the data for the quarters and FY.*
☐	Click **Next**.	
☐	Enter **Title**.	*Type "Product Sales Summary."*
☐	Enter **Description**.	*Type "Drive hierarchy sync"*
☐	Skip **Link to a page** dropdown.	*(Do not link to a page. This will only be available for My Pages within an app.)*
☐	Skip **Allow editing**.	*(Do not enable Users to enter and edit data.)*
☐	Skip **Hierarchy filters** for **Rows** and **Columns**.	*(Do not select any hierarchy filters.)*
☐	Click **Add**.	*(Adds the card to the page.)*
☐	Click **Configure grid** on right card.	
☐	Select data source.	*On the Module views tab, click REV03 Product Analysis to expand to see view names. Select: NUX Product Sales detail grid.* *OR practice customizing your own view: On the Custom views tab, select the REV03 Product Analysis module. You will see a preview of the default module view.*

☐	**If you are using the Custom view tab**, continue with the steps below to customize the view.	*Click the pivot icon in the grid toolbar.*
☐	Pivot the view.	*In the Pivot data dialog, arrange the dimensions as follows:* *Context selectors: Line Items, Versions* *Columns: Time* *Rows: P2 Product* *The grid preview will adjust as you pivot.*
☐	Click **x** to close dialog.	*The x is located in the upper right of the Pivot data dialog.*
☐	Filter the view.	*Click the filter icon (funnel) in the grid toolbar.*
☐	Add a filter rule for Time.	*In the Filter dialog, click Columns.* *Then click + Add Rule. For the Rule, select SYS01 Time Settings module, Months Only line item, filter condition Is true.*
☐	Click **Apply**.	*The preview will show only the data for months only in the columns.*
☐	Click **Next**.	
☐	Enter **Title**.	*Type "Product Sales Detail."*
☐	Enter **Description**.	*Type "Respond in hierarchy sync."*
☐	Skip **Link to a page** dropdown.	*(Do not link to a page. This will only be available for My Pages within an app.)*
☐	Enable **Allow editing**.	*Change toggle for Users to enter and edit data (will turn green). Note that this will not change any underlying permissions in the model itself.*
☐	Enable **Hierarchy filter** for **Rows** and **Columns**.	*Under **Rows**, change toggle for P2 Product (will turn green).* *Under **Columns**, change toggle for Time (will turn green)*
☐	Click **Add**.	*(Adds the card to the page.)*
☐	Click **Publish**.	*(Publishes the page.)*
Adjust layout		
☐	Click **Edit icon** (pencil) on page.	*(Enter designer mode.)*
☐	Expand the height of row.	*Hover mouse at the bottom of the row containing the cards. Drag blue bar down to achieve desired row height.*
☐	Redistribute horizontal space between two cards.	*Hover mouse between the cards. Drag blue bar two grid positions to the left.*
☐	Click **Publish**.	*(Publishes the page.)*

Create the Monthly Employee Expense Trend Data worksheet

Begin the page

☐	Select **< Back to My Pages** from the navigation tab dropdown.	*Use navigation tab on the right to navigate to the My Pages landing page (or navigate to Apps landing page if building within an existing app).*
☐	Click **Create a page**.	
☐	Click **Worksheet**.	
☐	Enter **Page name**.	*Overwrite default ("Untitled – date, time"); Type "Monthly Employee Expense Trend Data."*
☐	Select a workspace from dropdown.	*Select: the workspace containing Your Name - New UX Training Model v2.*
☐	Select a model from dropdown.	*Select: Your Name – New UX Training Model v2.*
☐	Skip **Category (optional)**.	*(This is only visible when working in Apps, not My Pages.)*
☐	Click **Create**.	

Add the primary grid

☐	Click **Configure grid**.	
☐	Select data source.	*On the Module views tab, click HR04 Employee Expenses to expand to see view names. Select: NUX Monthly Headcount and Employee Expense chart.* *OR practice customizing your own view: On the Custom views tab, select the HR04 Employee Expenses module. You will see a preview of the default module view.*
☐	**If you are using the Custom view tab**, continue with the steps below to customize the view.	
☐	Filter the view.	*Click the filter icon (funnel) in the grid toolbar.*
☐	Add a filter rule for Time.	*In the Filter dialog, click Columns.* *Then click + Add Rule. For the Rule, select SYS01 Time Settings module, Months Only line item, filter condition Is true.*
☐	Click **Apply**.	*The preview will show only the data for months only in the columns.*
☐	Click **x** to close dialog.	*The x is located in the upper right of the Filter dialog.*
☐	Show/hide line items.	*Click the Show/Hide icon (eye) in the grid toolbar. Select Line items from the dropdown. In the Items section, select Headcount, Salary, and Total Employee Expenses.*

☐	Click **Apply**.	*The preview will show only the data for the selected Line Items.*
☐	Click **Next**.	
☐	Skip **Allow editing**.	*(Toggle will be on by default.)*
☐	Turn off **Allow Pivot**.	*(Toggle will be gray or black. User pivot is only available when using a custom view.)*
☐	Skip **Hierarchy filters** for **Columns**.	*(Do not select any hierarchy filters.)*
☐	Click **Update**.	*(Adds the grid.)*
☐	Click **Publish**.	*(Publishes the page.)*
Populate the insights panel		
☐	Click **Edit icon** (pencil) on page.	*(Enter designer mode.)*
☐	In the **Quick links** section, click **Configure**.	*Note: You will only be able to add linked pages when working within an app, not within My Pages.*
☐	If you are working with an app, in the **Add pages** panel, select the related page. If you are working within My Pages, skip this step.	*Select Monthly Employee Expense Summary. The page title will appear under Quick links.*
☐	Close the Add pages panel (click **x**).	
☐	In the **Additional insights** section, click **Configure** (or click the **Settings icon** (cog) to reopen the Card selection panel).	
☐	Add a new **Grid** card.	*Drag or double-click Grid card from Cards panel to an Additional insights drop zone.*
☐	Click **Configure grid**.	
☐	Select data source.	*On the Module views tab, click HR01 Employee Profiles to expand to see view names. Select: NUX Employee Profiles grid.*
☐	Click **Next**.	
☐	Enter **Title**.	*Type "Employee Profiles"*
☐	Enter **Description**.	*Type "Enter or edit individual employee profile data."*
☐	Skip **Link to a page**.	*(Do not link to a page.)*
☐	Enable **Allow editing**.	*(Toggle should be green.)*
☐	Skip **Hierarchy filters.**	*(Do not select any hierarchy filters.)*
☐	Click **Add**.	*(Adds the grid card to the insights panel.)*
☐	Hover and click **ellipsis (...)** in the upper right corner of the card.	*Select Hide card preview.*
☐	In the **Cards** panel, if the Card template library has been populated, select a chart card from Card template library.	*Drag a chart card (e.g., Monthly Employee Expense Trend) from Card template library to drop zone.*

☐	Expand the height of card in insights panel.	*Hover mouse at the bottom of the chart card. Drag blue bar down to achieve desired card height.*
☐	(Optional) Hover and click **ellipsis (...)** in the upper right corner of the chart card.	*Select Set as open by default.*

☐	If the Card template library has not been populated, add a new chart card.	*Drag a chart card icon to drop zone.*
☐	Click **Configure chart**.	
☐	Click **View designer**.	*(Access the View designer from the Overview tab of the Card Configuration panel.)*
☐	Select data source.	*Click Module views to use a saved view. Click HR04 Employee Expenses to expand to see view names. Select: NUX Monthly Headcount and Employee Expense chart.*
☐	Click **Update**.	
☐	Enter **Title**.	*Type "Monthly Trend."*
	Enter **Description**.	*Type "Headcount, Salary, and Total Employee Expense by month."*
☐	Skip **Link to a page** dropdown.	*(Do not link to a page. This will only be available for My Pages within an app.)*
☐	Select **Chart type** from dropdown.	*Select Combination.*
☐	Click on the **Chart** tab of the Card configuration panel.	
☐	Select **Series** options.	*Headcount: Aqua, click chart type icon and select Column, click right axis icon* *Salary: Violet, Line* *Total Employee Expenses: Red, Line*
☐	Select **Axis** options.	*Left axis: Type "$US"* *Right axis: Type "Headcount"*
☐	Select **Labels** options.	*Legend position: Top* *Chart font size: Default* *Show data labels: off*
☐	Skip **Data** options.	*(Do not enable Plot trailing zeros.)*
☐	Click on the **Context** tab of the Card configuration panel.	
☐	Skip **Context Selectors** for the card.	*(Do not change default settings for E2 Employees# and Versions. By default, context selectors for the card are sync'd with page and do not display on the card.)*
☐	Click **x** on Card configuration panel.	*(Closes the Card configuration panel.)*
☐	Expand the height of card in insights panel.	*Hover mouse at the bottom of the chart card. Drag blue bar down to achieve desired card height.*

☐	(Optional) Hover and click **ellipsis (…)** in the upper right corner of the chart card.	*Select Set as open by default.*
☐	Click **Publish**.	*(Publishes the page)*

Link a card to a page in the app (only available for My Pages create within an app)

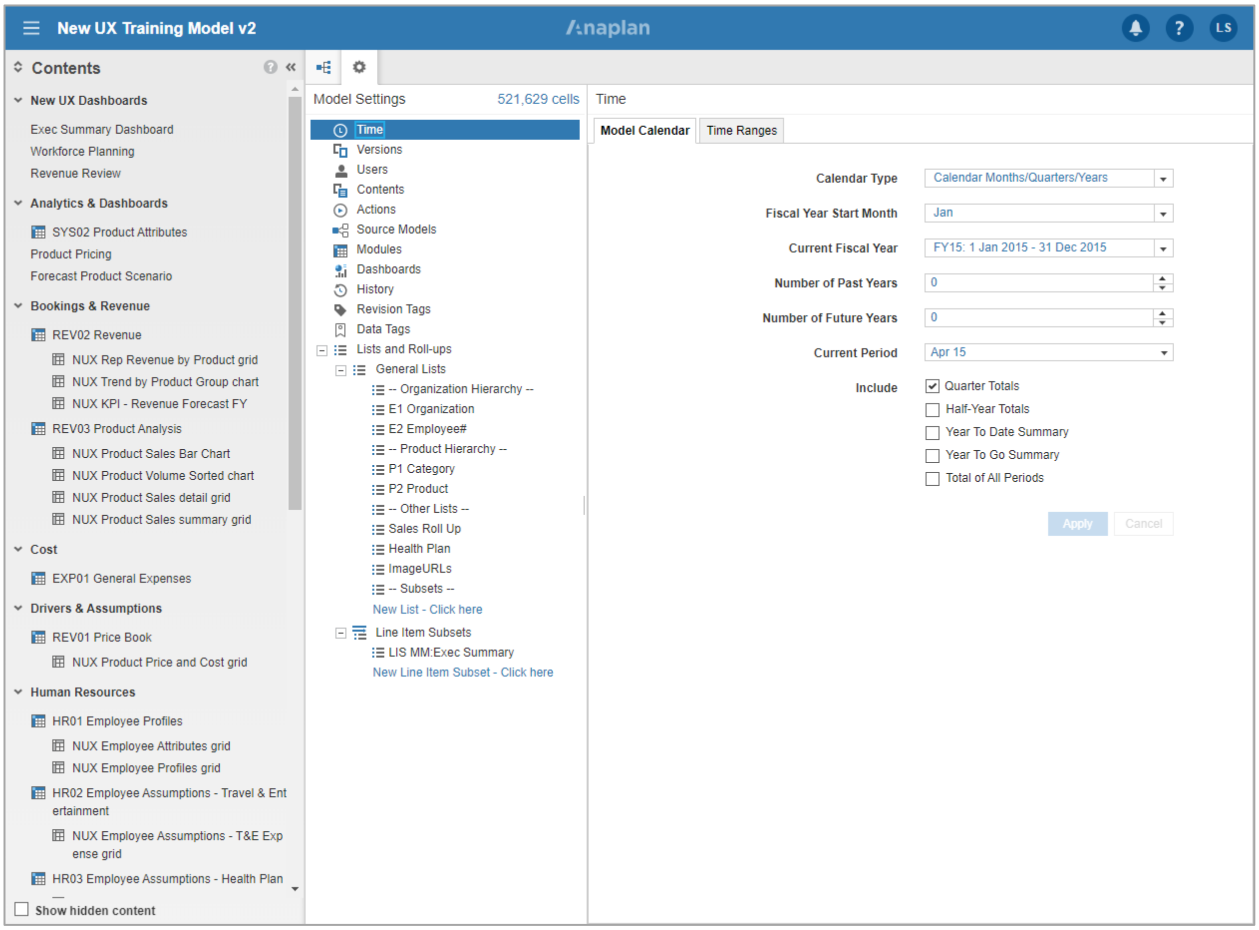
Edit a card on a page

☐	Select board to open from the navigation tab dropdown.	*Use navigation tabs on right to navigate to Apps landing page if building within an existing app; then select the app.* *Then select the page to edit.* *Select: Monthly Employee Expense Summary.*
☐	Click **Edit icon** (pencil) on page.	*(Enter designer mode.)*
☐	**Hover** over Monthly Trend chart card.	*(Reveals card's Edit icon and ellipsis.)*
☐	Click **Edit icon** (pencil) on card.	*Edit: Monthly Trend chart card.*
☐	Explore: Expand **Link to a page** dropdown.	*Note: You will only be able to add a link to a page when you are working in Apps, not in My Pages.* *If you are working in Apps, select: Monthly Employee Expense Trend Data.*
☐	Click **x** on Card configuration panel.	*(Closes the Card configuration panel.)*
☐	Click **Publish**.	*(Publishes the page.)*

Congratulations! You've built the first three personal pages demonstrated in the Working with Anaplan's New UX eLearning course. Continue to use My Pages to practice any other activities or procedures.

Optional: Model Overview

Orient yourself to the New UX Training Model v2 – its purpose, content, and schema – before completing the Build Guide.

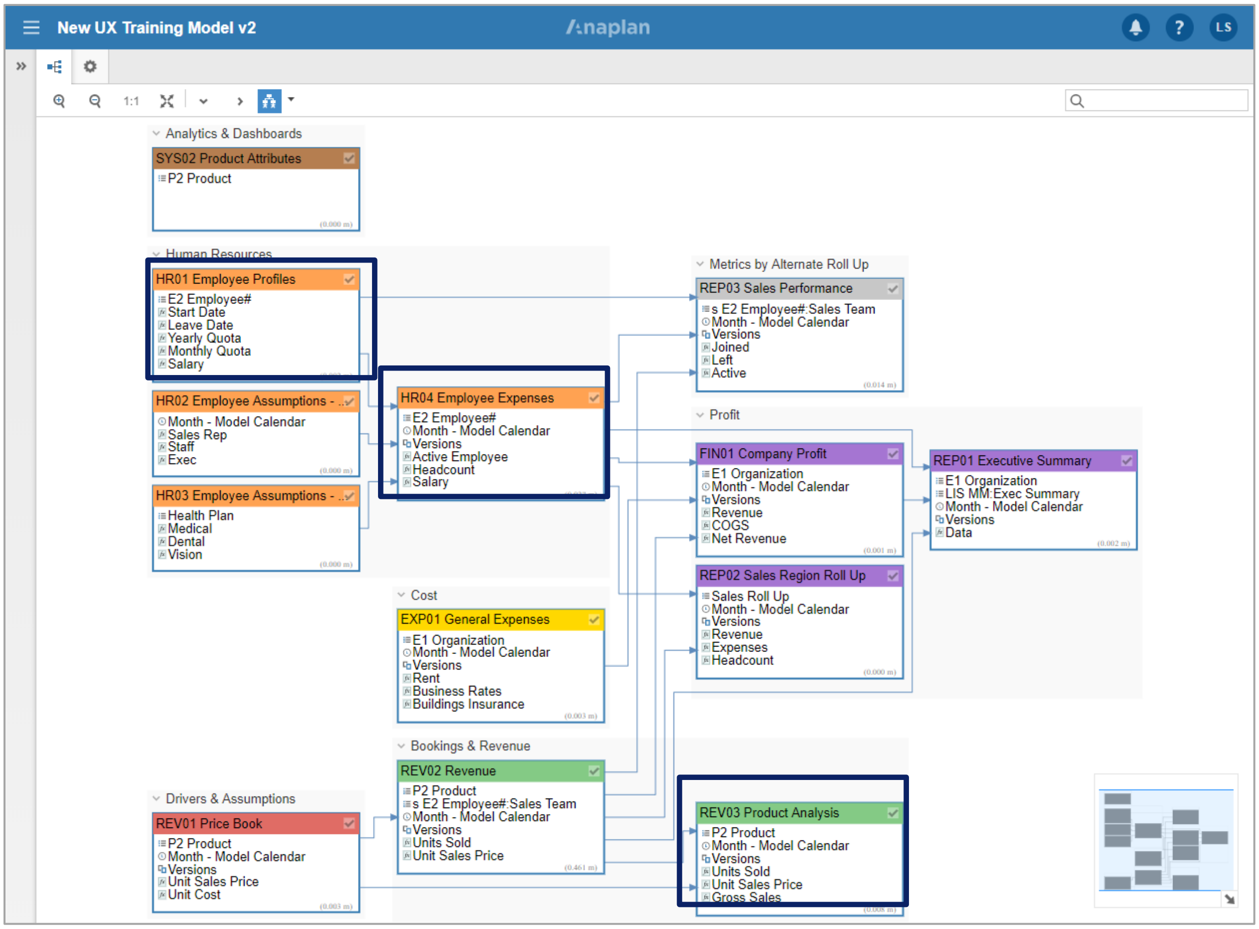


As you complete the Build Guide, you'll be working with a small sample model called "New UX Training Model v2."

This is a relatively simple financial analysis model that captures actual and forecast unit volume and dollar sales by product, sales rep, and month. It also captures product, employee, and general costs, as well as some cost driver assumptions, and it calculates overall profitability.

Key Dimensions	Key Data	Key Calculation
• Versions: actual, forecast, variance • Time: months, quarters, FY • Organization: regions • E2 Employee#: staff, exec, sales rep • P2 Product: product group, item	• Unit & dollar sales • Costs: product, employee & general • Cost assumptions	• Profitability

Take a quick look at the model map:



For pages you will create in the Build Guide, you are going to be focused on using just a few modules:

- HR04 Employee Expenses
- HR01 Employee Profiles
- REV03 Product Analysis

You will be building out pages to display and analyze some of the data from these modules.

Return to beginning of Build Guide.