Manuals+ — User Manuals Simplified.

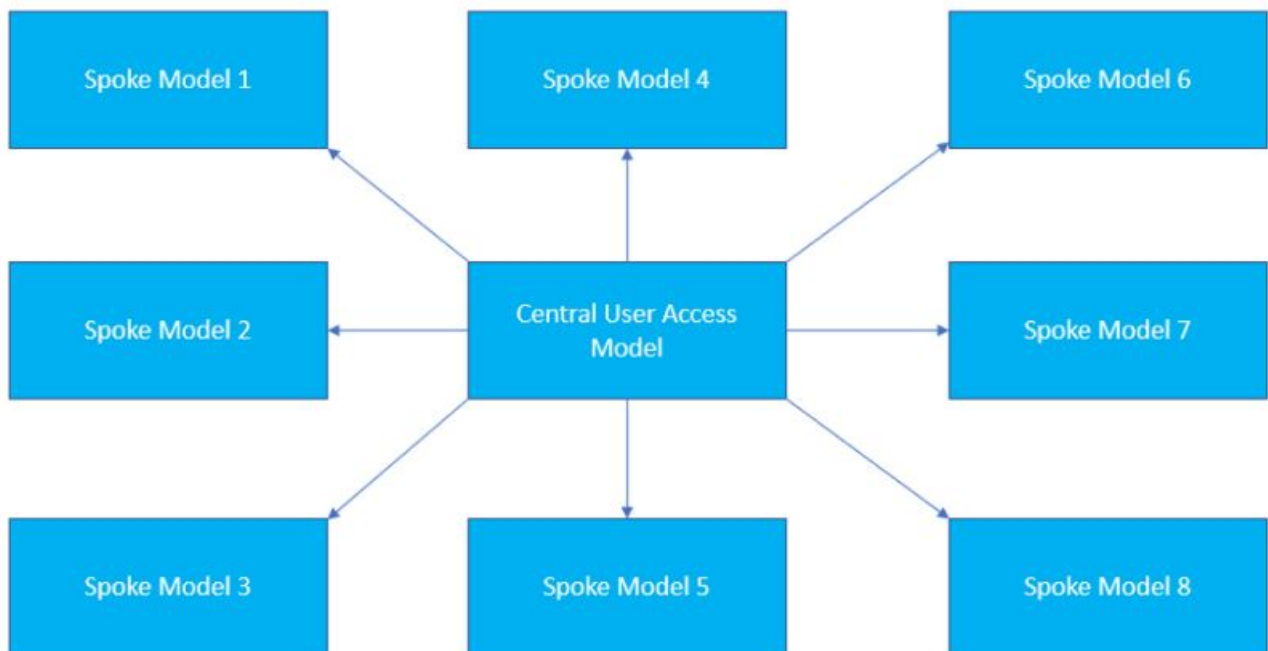# Anaplan 123780 User Access Management User Guide

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Anaplan 123780 User Access Management

Product Information

User Access Management (UAM) is a feature of Anaplan that allows administrators to add and delete users, manage their selective access assignments, elect workspace administration rights, or enable single sign-on functionality. Anaplan and its customers have continued to mature, which has led to the development of new and innovative ways to manage users leveraging a combination of actions, imports, custom lists, and modules. As a result, solutions have been developed to enable internal and external customers to more effectively manage users.

Product Usage Instructions

The following component has been ranked in order of complexity with Component A being the least technical to build. Users should deploy these components based on their requirements. The build time varies based on the complexity of the current model and level of deployment.

Component A: Monitor Users

The User Statistics Page component enables administrators to see how many individuals have access and what type of access they have. This is a static view. If users are added through the native user settings, they will not automatically be reflected in this basic solution. If admins do not build Component B, they should include language to remind them to manually update the dashboard component (i.e., export from user list and import into module).

1. Create Fake Users List
2. Create the SYS: Fake Users Module
   - Dimensions: Users
   - Line Item: User Text
   - Format: Text
   - Formula: NAME(ITEM(Users))
3. Create Load Fake Users List saved view:
   - Pivot so line items are on the columns and Users are the rows
   - Show the following line items: In Fake Users List
   - Enable filter by Load? = True (checked)

- Save View called Load Fake Users

4. Import fake users from SYS: Fake Users into Fake Users List

   - Import the User Text
   - Save this import action as Maintain: Load Fake Users from SYS:

     Fake Users

5. Create INP: User Settings Module

   - Dimensions: Fake Users Line Item, Email
   - Format: Text, List, ITEM(Fake Users), Boolean, No Data, Number,

     Number, Number, No Data, List, Boolean, No Data, Number

   - Formula: First Name, Last Name, Model Role, Single Sign-on,
     - COUNT-Count Single Sign-on Count, Non-Single Sign-on Count,
     - FILTERS-Prior Model Role Import Filter, –CONDITIONAL FORMATTING-Single Sign-on CF
   - 1 If 'Single Sign-on' THEN 1 ELSE 0 If NOT 'Single Sign-on' THEN 1 ELSE 0
   - IF Model Role = Prior Model Role THEN FALSE ELSE TRUE IF 'Single Sign-on' THEN 1 ELSE 0

6. Import Email from SYS: Fake Users into INP: User Settings

7. Export current native user settings in CSV format. Then import user settings into INP: User Settings

8. Create OUT: User Statistics module

   - Dimensions: Model Roles
   - Line Item: User Count, Single Sign-on Count
   - Format: Number
   - Formula: 'INP: User Settings'.Count[SUM: 'INP: User
   - Settings'.Model Role], 'INP: User Settings'.'Single Sign-on Count'[SUM: 'INP: User Settings'.Model Role]

Introduction

User Access Management (UAM)

Anaplan's robust native user access management capabilities enable administrators to add and delete users, manage their selective access assignments, elect workspace administration rights, or enable single sign-on functionality.
As Anaplan and its customers have continued to mature, we have identified new and innovative ways to manage users leveraging a combination of actions, imports, custom lists and modules. As a result, we have developed, and are in the continuous process of developing, solutions to enable our internal and external customers to more effectively manage users.

In-Model Solution

Benefits

- Enhanced visibility into model access
- Ability to sort/filter users by name and role
- Add, edit, or remove access for multiple users at once
- Copy user access settings from one user to another

Component Overview

The following component have been ranked in order of complexity with Component A being the least technical to build. Users should deploy these components based on their own requirements.

- Component A
  - Monitor users by model role and access type
  - Drill down to see individual-level access
- Component B
  - Add new user(s)
  - Assign model role and Single Sign-on access
  - Update user model role
- Component C
  - Add new user and assign selective access
  - Update selective access
- Component D
  - Copy selective access from one user to another

Build Time: 1-2 hours. Time varies based on the complexity of the current model and the level of deployment.

Build Instructions

Component A: Monitor Users

The User Statistics Page component enables Administrators to see how many individuals have access and what type of access they have. This is a static view. If users are added through the native user settings, they will not automatically be reflected in this basic solution. If admins do not build Component B, they should include language to remind them to manually update the dashboard component (i.e., export from user list and import into module).

1. Create "Fake Users List"
2. Create the SYS: Fake Users Module

SYS: Fake Users		
Dimensions: Users		
Line Item	**Format**	**Formula**
User Text	Text	NAME(ITEM(Users))
In Fake Users List	List	FINDITEM(Fake Users, User Text)
Load?	Boolean	ISBLANK(In Fake Users List)

3. Create "Load Fake Users List" saved view:
   1. Pivot so line items are on the columns and Users are the rows
   2. Show the following line items: In Fake Users List
   3. Enable filter by Load? = True (checked)
   4. Save View called "Load Fake Users"
4. Import fake users from SYS: Fake Users into Fake Users List

1. Import the User Text
2. Save this import action as Maintain: Load Fake Users from SYS: Fake Users

5. Create the following lists:
    1. All Model Roles list
        1. No additional action required
    2. Model Roles list
        1. Top Level: "All Roles"
        2. Make "All Model Roles" list the parent
        3. Export roles from native user settings and import roles into Model Roles list
        4. Assign unique code to each model role

6. Create INP: User Settings Module

INP: User Settings		
Dimensions: Fake Users		
Line Item	**Format**	**Formula**
Email	List	ITEM(Fake Users)

First Name	Text	
Last Name	Text	
Model Role	List	
Single Sign-on	Boolean	
–COUNT–	No Data	
Count	Number	1
Single Sign-on Count	Number	If 'Single Sign-on' THEN 1 ELSE 0
Non-Single Sign-on Count	Number	If NOT 'Single Sign-on' THEN 1 ELSE 0
–FILTERS–	No Data	
Prior Model Role	List	
Import Filter	Boolean	IF Model Role = Prior Model Role THEN FALSE ELSE TRUE
–CONDITIONAL FORMATTING–	No Data	
Single Sign-on CF	Number	IF 'Single Sign-on' THEN 1 ELSE 0

7. Import Email from SYS: Fake Users into INP: User Settings
8. Export current native user settings in CSV format. Then import user settings into INP: User Settings
9. Create OUT: User Statistics module

Line Item	Format	Formula
OUT: User Statistics		
Dimensions: Model Roles		
User Count	Number	'INP: User Settings'.Count[SUM: 'INP: User Settings'.Model Role]
Single Sign-on Count	Number	'INP: User Settings'.'Single Sign-on Count'[SUM: 'INP: User Settings'.Model Role]
Non-Single Sign-on Count	Number	'INP: User Settings'.Count[SUM: 'INP: User Settings'.Model Role]
–CONDITIONAL FORMATTING–	No Data	
User Count CF	Number	IF User Count > 0 THEN 1 ELSE 0
Single Sign-on Count CF	Number	IF 'Single Sign-on Count' > 0 THEN 1 ELSE 0
Non-Single Sign-on Count CF	Number	IF 'Non-Single Sign-on Count' > 0 THEN 1 ELSE 0

10. Create the following saved views from OUT: User Statistics module:
    1. DB View
        1. Model Roles list as columns and line items as rows
        2. Show:
            1. Columns: Full Access, Executive, Operations, No Access
            2. Rows: User Count, Single Sign-on Count, Non-Single Sign-on Count
        3. Enable conditional formatting
        4. Save view as "DB View"
    2. Pie Chart
        1. Models Roles list as rows and line items as columns
        2. Show:
            1. Columns: User Count

2. Rows: Full Access, Executive, Operations, No Access

3. Save as "Pie Chart"

11. Prepare the Page:

　　1. Publish the following to the dashboard:

　　　　1. OUT: User Statistics – DB View saved view

　　　　2. Pie Chart created from OUT: User Statistics – Pie Chart saved view

　　　　3. Instructions: "The following table and pie chart below provide visibility into how many users are provisioned in this model and what type of access those users have. NOTE: This is a static snapshot into user statistics. In order to update this table and pie chart, follow the instructions below."
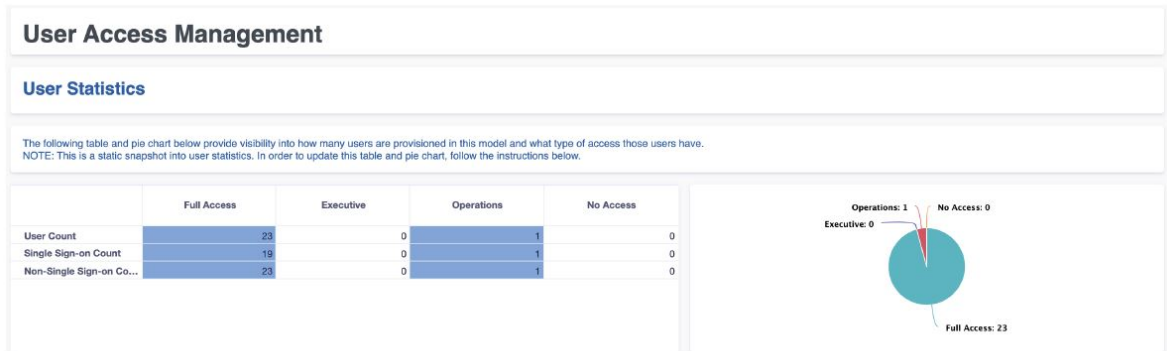
Component B: Manage Users and Role Assignment

Enable Admins to quickly add new users and assign roles, or update model role assignment for existing users.

1. Add line items to INP: User Settings module (created in Component A)

INP: User Settings		
Add the following line items		
Line Item	**Format**	**Formula**
–FILTERS–	No Data	
Prior Model Roles	List	
Import Filter	Boolean	IF Model Role = Prior Model Role THEN FALSE ELSE TRUE

2. Create the following saved views:

　　1. Input DB

　　　　1. Line items as columns and Fake Users as rows

　　　　2. Show: Email, First Name, Last Name, Model Role, Single Sign-on

　　　　3. Save this view as "Input DB"

　　2. User Settings Import

1. Line items as columns and Fake Users as rows
2. Show: Email, First Name, Last Name, Model Role, Single Sign-on, Import Filter
3. Apply Filter to show items with Import Filter = True (checked)
4. Save this view as "User Settings Import"

3. Copy Current to Prior
1. Line items as columns and Fake Users as rows
2. Show: Model Role, Prior Model Role, Import Filter
3. Apply Filter to show items with Import Filter = True (checked)
4. Save this view as "Copy Current to Prior"

3. Use Import to Copy Current Model Role to Prior Model Role from INP: User Settings –Copy Current to Prior saved view
1. Save this action as 1.2 Copy Current to Prior

4. Set-up 1.1 Import User Settings into Native User Settings
1. From native user settings import from INP: User Settings – User Settings Import saved view
2. Import First Name, Last Name, Model Role, and Single Sign-on using Email as source
3. Save as 1.1 Import User Settings into Native User Settings

5. Create process "Update User Settings"
1. Add Maintain: Load Fake Users from SYS: Fake Users and 1.1 Import User Settings into Native User Settings and 1.2 Copy Current to Prior to this process

6. Create the "Add New User" Worksheet (and Form)
1. Make the grid the "INP: User Settings – Input DB" saved view
2. Select "Configure Worksheet Actions"
3. On the right panel, select the "Forms" drop down menu and create a new form
1. Form Title: "Add New User"
2. Choose List: "Fake Users"
3. Choose Module: "INP: User Settings"
4. Line Items to Include: First Name, Last Name, Model Role, Single Sign On

7. Prepare the Page:
1. Publish INP: User Settings – Input DB to dashboard
2. Publish "Update User Settings" process to dashboard via action card [Note: In the sample dashboard below, the "Update User Settings" process is not displayed. This is because the complete template contains Selective Access provisioning and this button is located at the bottom of the dashboard.]
3. Publish "Add New User" form via an action card
4. Instructions: To add a new user, press "Add User" button. You will be prompted with a form to complete to add a new user. Once the required information is input, or changes are made to current users, press

"Update User Settings" to apply changes to the native user settings.

5. Workaround Disclaimer Language: Workarounds: 1) Workspace Administrator (WSA) rights can only be assigned from the native user settings. If adding a user that requires WSA access, be sure to go to the native user settings to provision WSA access even if the boolean is checked above. 2) To remove access for a user who previously had access, mark their role as "No Access" before updating user settings. 3) To remove a user that has been added via the "Add User" action before the changes have been published to the native user settings, leverage Anaplan's native list management capabilities, or select the drop down menu at the top left corner of dashboard module to Edit and then delete list items.

Manage Users and Role Assignment

Add New User	To add a new user, press "Add User" button. You will be prompted with a form to complete to add a new user. Once the required information is input, or changes are made to current users, press "Update User Settings" to apply changes to the native user settings.				
	First Name	**Last Name**		**Model Role**	**Single Sign-on**
Corey.Jacoby@anaplan.com	Corey	Jacoby		Full Access	☑
Pierre.Kerkinni@anaplan.com	Pierre	Kerkinni		Full Access	☑
Connie.Jaremczuk@anaplan.com	Connie	Jaremczuk		Operations	☑
Justin.Filip@anaplan.com	Justin	Filip		Full Access	☑

Known Workarounds:

Include language around required workarounds:

- Assign/update WSA rights:
  - WSA assignment can only be done from the native users settings
- Remove User Access From Current User:
  - Mark model role as "No Access" and utilize the native user settings to remove user from the model
- Remove user that has been added to user list via the "Add User" action
  - Utilize list management to manually remove that item

Component C: Manage Selective Access

Add or update Selective Access for new or existing users.

Pre-Build Activities:

- Identify which lists will have selective access enabled
- Define role-based access to lists with selective access enabled
- Configure those lists with selective access Boolean enabled

1. Create flat Region and Cost Center lists
   1. Create Region Flat (L1) and Cost Center Flat
   2. Import the Region and Cost Center lists into the flat lists
   3. If the source lists have assigned the items a unique code, import that code with the list item name. If the source list has not assigned the list items a unique code, assign a unique identifier.
2. Create SYS: Cost Center Flat Properties module

SYS: Cost Center Flat Properties		
Dimensions: Cost Center Flat		
Line Item	**Format**	**Formula**
Code	Text	CODE(ITEM('Cost Center Flat'))
Cost Center (Hierarchy)	List	FINDITEM(Cost Center, Code)
Name	Text	NAME('Cost Center (Hierarchy)')

3. Create SYS: Region Flat Properties module

SYS: Region Flat Properties		
Dimensions: Region Flat (L1)		
Line Item	**Format**	**Formula**
Code	Text	CODE(ITEM('Region Flat (L1)'))
Region (Hierarchy)	List	FINDITEM('Region (L1)', Code)
Name	Text	NAME('Region (Hierarchy)')

4. Create INP: Cost Center Selective Access

Line Item	Format	Formula
INP: Cost Center Selective Access		
Dimensions: Fake Users, Cost Center Flat		
User	List	IF Write OR Read OR ISNOTBLANK(Cost Center None) THEN ITEM(Fake Users) ELSE BLANK
Write	Boolean	
Read	Boolean	
–ANAPLAN CALCS–	No Data	
Cost Center Write	Text	IF Write THEN 'SYS: Cost Center Flat Properties'.Code ELSE BLANK
Cost Center Read	Text	IF Read THEN 'SYS: Cost Center Flat Properties'.Code ELSE BLANK
Cost Center None	Text	IF NOT Write AND Prior Write OR NOT Read AND Prior Read THEN 'SYS: Cost Center Flat Properties'.Name ELSE BLANK
Load?	Boolean	Write <> Prior Write OR Read <> Prior Read AND ISNOTBLANK(User) OR ISNOTBLANK(Cost Center None)
–PRIOR–	No Data	
Prior Read	Boolean	
Prior Write	Boolean	
–CONDITIONAL FORMATTING–	No Data	
Read and Write CF	Number	IF Write AND Read THEN 1 ELSE 0

5. Create the Following Saved Views
    1. Selective Access Import
        1. Line Items as the columns and Fake Users and Cost Center Flat as the rows
        2. Show User, Cost Center Read, Cost Center Write, Load? line items
        3. Enable filter to show items with Load?=TRUE (checked)
        4. Save this view
    2. Copy Current to Prior
        1. Line Items as the columns and Fake Users and Cost Center Flat as the rows
        2. Show User, Write, Read, Prior Write, Prior Read line items

3. Enable filter to show items with Load?=TRUE (checked)

4. Save this view

3. DB View

1. Line Items as the columns, Fake Users as the Page, Cost Center Flat as the rows

2. Show Write and Read

3. Save this view

4. Remove Security

1. Line Items as the columns and Fake Users and Cost Center Flat as the rows

2. Show User, Cost Center None, Load? line items

3. Enable filter to show items with Load?=TRUE (checked)

4. Save this view

6. Create INP: Region Selective Access

	INP: Region Selective Access		

Dimensions: Fake Users, Region Flat (L1)

Line Item	Format	Formula
User	List	IF Write OR Read OR ISNOTBLANK(Region None) THEN ITEM(Fake Users) ELSE BLANK
Write	Boolean	
Read	Boolean	
–ANAPLAN CALCS–	No Data	
Region Write	Text	IF Write THEN 'SYS: Region Flat (L1) Properties'.Code ELSE BLANK
Region Read	Text	IF Read THEN 'SYS: Region Flat (L1) Properties'.Code ELSE BLANK
Region None	Text	IF NOT Write AND Prior Write OR NOT Read AND Prior Read THEN 'SYS: Region Flat (L1) Properties'.Name ELSE BLANK
Load?	Boolean	Write <> Prior Write OR Read <> Prior Read AND ISNOTBLANK(User) OR ISNOTBLANK(Region None)
–PRIOR–	No Data	
Prior Read	Boolean	
Prior Write	Boolean	
–CONDITIONAL FORMATTING–	No Data	

7. Create the Following Saved Views:
    1. Selective Access Import
        1. Line Items as the columns and Fake Users and Region Flat (L1) as the rows

      2. Show User, Region Read, Region Write, Load? line items

      3. Enable filter to show items with Load?=TRUE (checked)

      4. Save this view

2. Copy Current to Prior

    1. Line Items as the columns and Fake Users and Region Flat (L1) as the rows

    2. Show User, Write, Read, Prior Write, Prior Read line items

    3. Enable filter to show items with Load?=TRUE (checked)

    4. Save this view

3. DB View

    1. Line Items as the columns, Fake Users as the Page, Region Flat (L1) as the rows

    2. Show Write and Read

    3. Save this view

4. Remove Security

    1. Line Items as the columns and Fake Users and Region Flat (L1) as the rows

    2. Show User, Region None, Load? line items

    3. Enable filter to show items with Load?=TRUE (checked)

    4. Save this view

8. Set-up the following imports and rename once you are done

    1. 2.1 CC Selective Access Remove Security

        1. Import into Native User Settings from INP: Cost Center Selective Access –Remove Security saved view

        2. Import 2 fields:

            1. User à Email Address

            2. Cost Center None à Cost Center None

    2. 2.2 CC Selective Access Import

        1. Import into Native User Settings from INP: Cost Center Selective Access –Selective Access saved view

        2. Import 3 fields:

            1. User à Email Address

            2. Cost Center Read à Cost Center Read

            3. Cost Center Write à Cost Center Write

    3. 2.3 CC Selective Access Copy Current to Prior

        1. Import into INP: Cost Center Selective Access from INP: Cost Center Selective Access – Copy Current to Prior saved view

        2. Import 2 fields:

            1. Write à Prior Write

            2. Read à Prior Read

    4. 2.4 Region Selective Access Remove Security

        1. Import into Native User Settings from INP: Region Selective Access –Remove Security saved view

        2. Import 2 fields:

            1. User à Email Address

            2. Region None à Region None

    5. 2.5 Region Selective Access Import

1. Import into Native User Settings from INP: Region Selective Access –Selective Access saved view
2. Import 3 fields:
    1. User à Email Address
    2. Region Read à Region Read
    3. Region Write à Region Write

6. 2.6 Region Selective Access Copy Current to Prior
    1. Import into INP: Region Selective Access from INP: Region Selective Access – Copy Current to Prior saved view
    2. Import 2 fields:
        1. Write à Prior Write
        2. Read à Prior Read

9. Create Process "Update User Settings" and add imports 2.1 to 2.6 to the process
10. Prepare the Page:
    1. Publish INP: Cost Center Selective Access – DB View
    2. Publish INP: Region Selective Access – DB View
    3. Publish "Update User Settings" process
    4. Instructions: Input Selective Access settings below and then press "Update User Settings" to import new users and/ update user settings. If you have leveraged the Copy To / From capability above, please note that you must run the "Update User Settings" process to apply changes to the native user settings.

Note: This example focuses on a single level hierarchy for both Cost Center and Region. If this dashboard is being built for a multi-level hierarchy, make sure that you incorporate a process to clear the highest level of the hierarchy before applying changes at lower levels. For example, if All Cost Centers was previously assigned, that assignment would need to be cleared out via the "None Import" before assigning Finance and Accounting.

Component D: Copy Selective Access From One User To Another (Copy To/From)

Enable Administrators to set-up a new user, or update a user, with the same selective access settings as another user.

1. Create INP: Copy From/To Module

INP: Copy From/To		
Dimensions: Fake Users		
Line Item	**Format**	**Formula**
Copy From	List	List: Fake Users; DCA: Copy User Access
Copy User Access	Boolean	
–CALCULATIONS–	No Data	
Copy To	List	
–CONDITIONAL FORMATTING–	No Data	
Input Highlight	Number	

2. Create the following saved view:
    1. DB View
        1. Fake Users list as rows and line items as columns
        2. Show: Copy User Access and Copy From
        3. Save this view
3. Add new line items to INP: Region Selective Access and INP: Cost Center Selective Access

INP: Region Selective Access

New Line Items to Add

Line Item	Format	Formula
–COPY FROM/TO–	No Data	
Load Copy To?	Boolean	'INP: Copy From/To'.Copy User Access AND (Write[LOOKUP: Copy From] OR Read[LOOKUP: Copy From])
Copy From	List: Fake Users	'INP: Copy From/To'.Copy From
Copy To	List: Fake Users	IF Load Copy To? THEN 'INP: Copy From/To'.Copy To ELSE BLANK
Copy From Write User	Text	IF ISBLANK(Copy To) THEN BLANK ELSE Region Write[LOOKUP: Copy From]
Copy From Read User	Text	IF ISBLANK(Copy To) THEN BLANK ELSE Region Read[LOOKUP: Copy From]
Copy From Write Boolean	Boolean	ISNOTBLANK(Copy From Write User)
Copy From Read Boolean	Boolean	ISNOTBLANK(Copy From Read User)

–CLEAR PREVIOUS ACCESS–	No Data	
Clear Write	No Data	
Clear Read	No Data	
Clear Previous Write	No Data	
Clear Previous Read	No Data	
Clear Previous?	Boolean	'INP: Copy From/To'.Copy To = User AND ISNOTBLANK(Clear Previous Access)
Clear Previous Access	Text	IF Write OR Read THEN 'SYS: Region Flat (L1) Properties'.Code ELSE BLANK

Line Item	Format	Formula
INP: Cost Center Selective Access		
New Line Items to Add		
–COPY FROM/TO–	No Data	
Load Copy To?	Boolean	'INP: Copy From/To'.Copy User Access AND (Write[LOOKUP: Copy From] OR Read[LOOKUP: Copy From])
Copy From	List: Fake Users	'INP: Copy From/To'.Copy From
Copy To	List: Fake Users	IF Load Copy To? THEN 'INP: Copy From/To'.Copy To ELSE BLANK
Copy From Write User	Text	IF ISBLANK(Copy To) THEN BLANK ELSE Cost Center Write[LOOKUP: Copy From]
Copy From Read User	Text	IF ISBLANK(Copy To) THEN BLANK ELSE Cost Center Read[LOOKUP: Copy From]
Copy From Write Boolean	Boolean	ISNOTBLANK(Copy From Write User)
Copy From Read Boolean	Boolean	ISNOTBLANK(Copy From Read User)
–CLEAR PREVIOUS ACCESS–	No Data	
Clear Write	No Data	
Clear Read	No Data	
Clear Previous Write	No Data	
Clear Previous Read	No Data	
Clear Previous?	Boolean	'INP: Copy From/To'.Copy To = User AND ISNOTBLANK(Clear Previous Access)
Clear Previous Access	Text	IF Write OR Read THEN 'SYS: Cost Center Flat Properties'.Code ELSE BLANK

4. Create the following saved views:

1. INP: Cost Center Selective Access – Copy To: Clear Previous
    1. Line items as the columns; Cost Center Flat and Fake Users lists as the rows
    2. Show: Write, Read, Prior Write, Prior Read, Clear Write, Clear Read, Clear Prior Write, Clear Prior Read, Clear Previous?
    3. Enable Filter: Clear Previous?= TRUE (checked)
2. INP: Cost Center Selective Access – Copy To: Module Settings
    1. Line items as the columns; Cost Center Flat and Fake Users lists as the rows
    2. Show: Write, Read, Copy From Write, Copy From Read, Load Copy To?
    3. Enable Filter: Load Copy To? = TRUE (checked)
3. INP: Region Selective Access – Copy To: Clear Previous
    1. Line items as the columns; Region Flat (L1) and Fake Users lists as the rows
    2. Show: Write, Read, Prior Write, Prior Read, Clear Write, Clear Read, Clear Prior Write, Clear Prior Read, Clear Previous?
    3. Enable Filter: Clear Previous?= TRUE (checked)
4. INP: Region Selective Access – Copy To: Module Settings
    1. Line items as the columns; Region Flat (L1) and Fake Users lists as the rows
    2. Show: Write, Read, Copy From Write, Copy From Read, Load Copy To?
    3. Enable Filter: Load Copy To? = TRUE (checked)
5. Create the following imports:
    1. 3.1 Copy To: Clear Current Module Settings (Region)
    § Import into INP: Region Selective Access from INP: Region Selective Access – Copy To: Clear Previous saved view
    § Import 4 fields:
    • Clear Read à Read
    • Clear Write à Write
    • Clear Previous Read à Prior Read
    • Clear Previous Write à Prior Write
    2. 3.2 Copy To: Copy From to Current (Region)
        1. Import into INP: Region Selective Access from INP: Region Selective Access – Copy To: Module Settings saved view
        2. Import 2 fields:
            1. Copy From Write Boolean à Write
            2. Copy From Read Boolean à Read
    3. 3.3 Copy To: Clear Current Module Settings (Cost Center)
        1. Import into INP: Cost Center Selective Access from INP: Cost Center Selective Access – Copy To: Clear Previous saved view
        2. Import 4 fields:
            1. Clear Read à Read
            2. Clear Write à Write
            3. Clear Previous Read à Prior Read
            4. Clear Previous Write à Prior Write
    4. 3.4 Copy To: Copy From to Current (Cost Center)
        1. Import into INP: Cost Center Selective Access from INP: Cost Center Selective Access – Copy To:

Module Settings saved view

2. Import 2 fields:

1. Copy From Write Boolean à Write

Copy From Read Boolean à Read

6. Prepare the Page:

1. Publish INP: Copy From/To – DB View saved view

Manager Selective Access

Copy User Security Settings From One User to Another

	Copy To / From	After running this process, clear settings in the module below.

	Copy From	Copy User Access
Corey.Jacoby@anaplan.com		☐
Pierre.Kerkinni@anaplan.com		☐
Connie.Jaremczuk@anaplan.com		☐

Documents / Resources

	Anaplan 123780 User Access Management [pdf] User Guide 123780 User Access Management, 123780, User Access Management, Access Management, Management