

# Anaplan Connect User Guide

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## Introduction to Anaplan Connect

### *What is it for?*

Anaplan Connect lets you automate the process of loading data into Anaplan by running a batch file from your local machine (otherwise known as .bat files). A batch file is a file that runs a program when you double-click on it in Windows Explorer.

For example, you might have a batch file named *RunMyImport* that loads a text file *Europe.txt* up to the Anaplan server. If you have a scheduling program, you could set it to run this *RunMyImport.bat* program automatically at, say, 5.00am on a Monday morning, so you do not have to go in early! It takes a bit of setting up but can be very useful!

## To Install Anaplan Connect

1. Start by installing Java, if it is not already there on your PC. Download a free copy of Java from <http://java.com/en/download> and click **Free Java Download**. Follow the instructions for installation. Java 6 is recommended.
2. Download the latest version of the Anaplan Connect software. E.g. **anaplan-connect-[version].zip** and then unzip it into a suitable folder on your local machine such as **C:\Anaplan Connect**.

## Supported authentication methods

Anaplan Connect supports the following authentication methods. One of them must be used to authenticate when executing operations using Anaplan Connect.

### ***Username and password based authentication***

The same credentials used to log in to Anaplan can be used to authenticate using Anaplan Connect. Please refer to the “-user” option in the “List of Available Operations” table below.

### ***Certificate-based authentication***

Certificates generated by Anaplan can be used to authenticate using Anaplan Connect. To obtain a valid certificate, go to the Certificates tab under My Profile and click the “Create New Certificate” button. You will be prompted to download a newly-generated certificate (a CER file). Save this file locally on your file system.

There are two ways to instruct Anaplan Connect to use a downloaded certificate for authentication:

1. the location of the downloaded certificate (CER file) can be provided directly to Anaplan Connect using the “-certificate” option; **or**
2. the downloaded certificate can be stored in a password-protected Java KeyStore under a chosen alias. Once this is done, the path to the KeyStore, the KeyStore password, and the certificate alias should be provided to Anaplan Connect using the “-keystore”, “-keystorepass” and “-keystorealias” options, respectively. Please refer to the keytool documentation for instructions on how to import a certificate into a Java KeyStore.

## To import a text file and run the import

### *First run the import manually*

To set up the import definitions, the normal import routines must be run once as a 'dry run', before you can automate it using a batch file.

1. Open a module and choose **Data>Import**
2. Choose **Upload New File** and browse for the source .txt, .csv or .zip file.
3. At the preview screen, check the header row and first data row are correct, then click **Next**.
4. Check the mapping of each dimension in turn, then **Run Import**.

### *Then copy and edit a Batch file to automate this process*

A sample batch files is provided for you in the examples subfolder. E.g. **C:\Anaplan Connect\examples\example.bat**. This batch file uploads a text file then runs a pre-defined Anaplan import.

1. Copy the sample batch file named "*example.bat*" in the examples folder *C:\Anaplan Connect\examples* to the parent folder. In this example the parent folder is *C:\Anaplan Connect*, but could be elsewhere depending on where you installed Anaplan Connect.
2. **Right-click** and **Rename** the batch file to a name of your choice E.g. *RunMyImport*
3. **Right-click** and **Edit** the batch file. Only edit the highlighted variables shown. (Note that straight double quotes are needed " " as typed in notepad, not curly double quotes " " which you get when typing in Word).

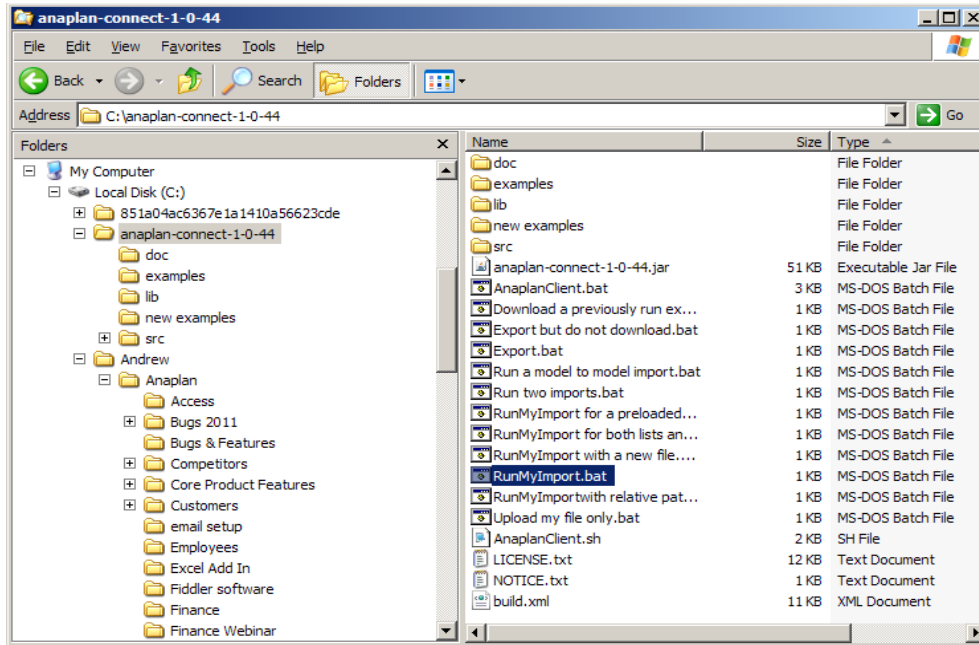
```
@echo off
rem This example loads a source text file and runs an Anaplan import into a module. For details of how to configure this script see doc/User Guide.html

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Europe P&L.txt" -put "C:\testdata\Europe P&L.txt" -import "P&L from Europe P&L.txt" -execute -output "C:\testdata\Europe P&L Errors.txt"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1
cd %~dp0
if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%
set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model %ModelId% %Operation%
@echo %Command%
cmd /c %Command%
pause
```

4. To run the import, open the folder C:\Anaplan Connect in Windows Explorer and double-click on the batch file *RunMyImport.bat*



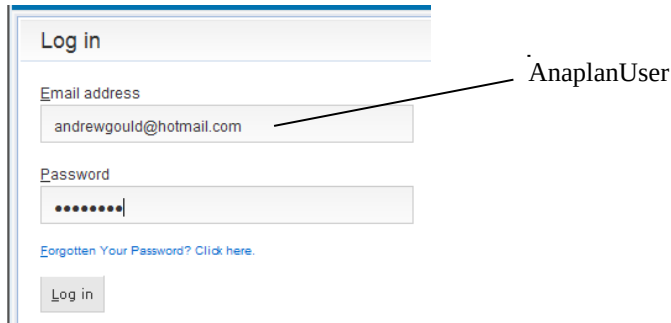
## Where to find the variables to use in the batch file

### *AnaplanUser*

The Anaplan user name is entered when you first log on to Anaplan. E.g. “**andrewgould@hotmail.co.uk**”. If you leave out the password it will prompt you when the batch file is run. Optionally, though less secure, you can enter it in the batch file:

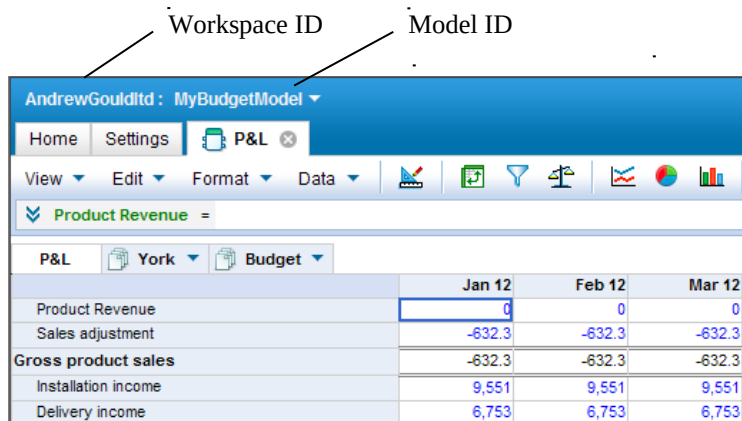
**set AnaplanUser="andrewgould@hotmail.co.uk:my password".**

This may be necessary if the batch file is scheduled to be run at a time when the user is not present, but remember to secure the location of the batch file so as not to reveal your password to others.



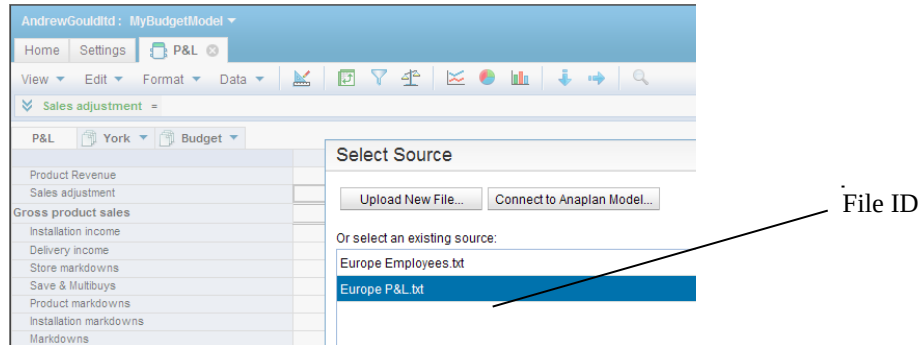
### *Workspace ID, Model ID*

The workspace ID and Model ID are found at the top left corner of the screen.



## **-file**

The file ID, such as **-file Europe P&L.txt**, is found by opening the target module in Anaplan and choosing **Data> Import**. This is the name of the file that was imported when the import definition was set up for the first time.

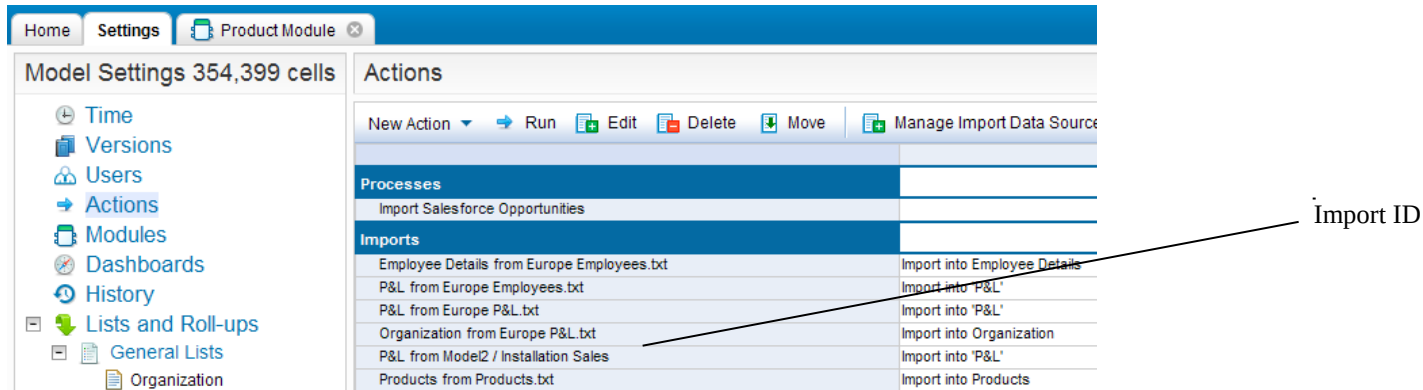


## **-put**

The full path name of the source text file is required. E.g. **-put "C:\testdata\Europe P&L.txt"**. It is also possible to refer to a path relative to where the batch file is located: E.g. **-put "examples\ Europe P&L.txt"** will look for a file in the Anaplan Connect examples folder.

## **-import**

The import ID, such as **-import "P&L from Europe P&L.txt"** is found on the Settings tab under Actions.



## **-execute**

Executes the import(s). No variables are required with this command.



***-output***

The full path name of the output error log file is required, such as: **-output "C:\testdata\Errors.txt"**. Any errors occurring in the import will be recorded in this text file.

## List of Available Operations

This table shows the full list of commands that can be used in the Operation line of the batch file. The abbreviated syntax can be used to save typing: E.g. **-x** instead of **-execute**. Some operations are followed by a variable. E.g. **-put "C:\testdata\Europe P&L.txt"** or **-p "C:\testdata\Europe P&L.txt"**

Syntax	Abbreviated Syntax	Followed by a variable, if applicable, such as the file pathname etc	What it does
<b>-help</b>	<b>-h</b>		display this help
<b>-debug</b>	<b>-d</b>		Show more detailed output
<b>-quiet</b>	<b>-q</b>		Show less detailed output
<b>-service</b>	<b>-s</b>	<i>https://api.anaplan.com/</i>	API service endpoint (defaults to <a href="https://api.anaplan.com/">https://api.anaplan.com/</a> ) In the command line, <b>-service https://api.uat.anaplan.com/</b> would run Anaplan on the UAT server
<b>-user</b>	<b>-u</b>	<i>username:password</i>	Anaplan user name and optional password in the format "username:password"
<b>-certificate</b>	<b>-c</b>	<i>Pathname on local machine</i>	Path to user certificate used for authentication (an alternative to using a key store)
<b>-keystore</b>	<b>-k</b>	<i>Pathname on local machine</i>	Path to local key store containing user certificate(s) for authentication
<b>-keystorepass</b>	<b>-kp</b>	<i>Password</i>	Password for the key store. If this option is not provided, and the file <code>~/.anaplan/api-client/keystore-access.txt</code> exists (where <code>~</code> is the user's home directory), the password will be read and decoded from the contents of this file. Otherwise, the user will be prompted for a password. The encoding used for obfuscation is the URL-encoded form of the result of taking the exclusive-or of each of the characters in the password and the value 129.
<b>-keystorealias</b>	<b>-ka</b>	<i>Alias</i>	Alias of the public certificate in the specified key store
<b>-via</b>	<b>-v</b>	<i>Proxy URL</i>	Use specified proxy
<b>-viauser</b>	<b>-vu</b>	<i>username:password</i>	Pass credentials to authenticating proxy
<b>-workspaces</b>	<b>-W</b>		List available workspaces
<b>-workspace</b>	<b>-w</b>	<i>Workspace name or ID</i>	Select a workspace by ID or name
<b>-models</b>	<b>-M</b>		List available models in selected workspace
<b>-model</b>	<b>-m</b>	<i>Model name or ID</i>	Select a model by ID or name
<b>-modules</b>	<b>-MO</b>		List available modules in selected model
<b>-module</b>	<b>-mo</b>	<i>Module name or ID</i>	Select a module by ID or name
<b>-views</b>	<b>-VI</b>		List available views in selected module
<b>-view</b>	<b>-vi</b>	<i>View name or ID</i>	Select a view by ID or name
<b>-files</b>	<b>-F</b>		List available files on the Anaplan server in selected model
<b>-file</b>	<b>-f</b>	<i>File name on Anaplan server</i>	Select a server file by ID or name
<b>-get</b>	<b>-g</b>	<i>Pathname on local machine</i>	Download specified file
<b>-gets</b>			Write specified server file to standard output.
<b>-getc</b>			Write tab-separated sever file to standard output
<b>-put</b>	<b>-p</b>	<i>Pathname on local machine</i>	Upload specified file
<b>-puts</b>			Upload to specified server file from standard input
<b>-putc</b>			Upload to specified server file from tab-separated standard input
<b>-imports</b>	<b>-I</b>		List available imports in selected model
<b>-import</b>	<b>-i</b>	<i>Import name or ID</i>	Select an import by id/name
<b>-exports</b>	<b>-E</b>		List available exports in selected model

<b>-export</b>	<b>-e</b>	<i>Export name or ID</i>	Select an export by id/name
<b>-actions</b>	<b>-A</b>		List available actions in selected model, such as import, export, delete actions etc
<b>-action</b>	<b>-a</b>	<i>Action name or ID</i>	Select a saved action E.g. delete items from a list
<b>-processes</b>	<b>-P</b>		List available processes in selected model
<b>-process</b>	<b>-p</b>	Process name or ID	Select a process by id/name
<b>-locale</b>	<b>-xl</b>	ISO language & country code separated by underscore eg 'en_US'	Specify locale to use when performing server operation
<b>-connectorproperty</b>	<b>-xc</b>	Property identifier and value separated by colon. If value is ?, prompt user	Specify import data source connection property (eg Salesforce credentials)
<b>-mappingproperty</b>	<b>-xm</b>	Dimension and vlaue separated by colon. If value is ?, prompt user	Specify prompt-at-runtime import mapping value
<b>-execute</b>	<b>-x</b>		-execute will run the preceding -import, -export, -process or -action
<b>-output</b>	<b>-o</b>	<i>Pathname on local machine</i>	Retrieve dump file for completed import
<b>-emd</b>		<i>Pathname on local machine</i>	Get meta-data for an export

When connecting to Anaplan's production server, the **-service** option need not be specified. Otherwise an API service endpoint URL is needed to supply to the program using this option.

A username and password should be supplied for the service in question. If not supplied on the command line using **-user**, the program will prompt the user for them.

The program can be run with or without specifying **-service** and/or **-user**, and the **-workspaces** option. This will cause the program to connect to the service using the supplied credentials, obtain a list of available workspaces, and dump them to the standard output in a tabulated form containing the ID and name of the workspace.

```
c6fc7db1bbccc542a02aa5f545ef8c7a Workspace 1
1cad4e5bced45025612a6c51efa562b0 Workspace 2
```

## JDBC Operations

Syntax	Followed by variable if applicable	What it does
<b>-loadclass</b>	<i>classname</i>	Load a Java class. This is used to load the jdbc driver, for example "com.mysql.jdbc.Driver". -loadclass is only needed for older (pre JDBC 4.0) drivers
<b>-jdbcurl</b>	<i>connectionurl</i>	URL for the jdbc query to connect to
<b>-jdbcuser</b>	<i>username:password</i>	Specify jdbc username and/or password. <i>Username:?</i> will prompt for password
<b>-jdbcproperty</b>	<i>name:value</i>	Optional, for setting any other properties. If value is ? then prompt for the value
<b>-jdbcquery</b>	<i>"SELECT * FROM mytable" or @myquery.sql</i>	SQL statement for the data to query and upload – or location of file containing query prefixed by '@'
<b>-jdbcfetchsize</b>	<i>number</i>	Insert before a query to tell the jdbc driver the number of records to transfer at a time.

Example: Update a list then import the data using the same source file

The process is almost identical to the last example, but in this case two import IDs need to be run: First update the list(s), then import the data.

In this example, the source text file *Europe P&L.txt* contains a series of profit-centres and the data for their budgets by month by income statement line. Since some of the profit-centres are new, the Organization list needs updating from *Europe P&L.txt* first before importing the data from the same text file into the Income Statement module.

As before, the import of new profit-centres into the Organization list and the import of data into P&L module both need to have been run manually beforehand to set up the import definitions. To import into a list, open a list on the **Settings** tab, choose **Import**, highlight a pre-loaded file (or upload a new file) and press **Select**.

The name of both the list import and the module import can be found under **Settings>Actions>Imports**.

The screenshot shows the Anaplan Settings interface. The left sidebar contains navigation options like Time, Versions, Users, Actions, Modules, Dashboards, History, Lists and Roll-ups, and General Lists. The main area is titled 'Model Settings 354,399 cells' and 'Actions'. Below this, there are buttons for 'New Action', 'Run', 'Edit', 'Delete', 'Move', and 'Manage Import Data Source'. The 'Imports' section is expanded, showing a list of import actions. Two annotations are present: one pointing to 'Import into P&L' with the label 'Import name for a Module', and another pointing to 'Import into Organization' with the label 'Import name for a list'.

Once this has been done, the batch file can be set up to automate this process: Note how the operation line at the bottom of the batch file is loading up just the one text file, but is running two imports off the back of it: One updates the Organization list and the second imports the data.

Just the editable part of the batch file is shown here with the changes highlighted. The non editable part of the batch file below 'end of settings' row is identical to the previous examples and needs to be included.

```
@echo off
rem This example loads a source text file and uses it to update the organization hierarchy then import the data.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Europe P&L.txt" -put "C:\testdata\Europe P&L.txt" -import "Organization from Europe P&L.txt" -execute -output "C:\testdata\Organization Errors.txt" -import "P&L from Europe P&L.txt" -execute -output "C:\testdata\Europe P&L Errors.txt"

rem *** End of settings - Do not edit below this line ***
```

## Example: Upload a file, but do not run the import

This example uploads the *Europe P&L.txt* file onto the Anaplan server, but does not run any imports. The data will not change in any modules until the import is run in Anaplan (Open the module, then choose **Data>Import>Select>Run Import**)

```
@echo off
rem This example uploads a source text file but does not run the import

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Europe P&L.txt" -put "C:\testdata\Europe P&L.txt"

rem *** End of settings - Do not edit below this line ***
```

## Example: Run the import from a pre-loaded file

This example runs the import in Anaplan based on a text file named *Europe P&L.txt* that has already been preloaded onto the Anaplan server. Outputs any errors to *Europe P&L Errors.txt*.

```
@echo off
rem This example runs an Anaplan import into a module from a pre-loaded text file

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-import "P&L from Europe P&L.txt" -execute -output "C:\testdata\Europe P&L Errors.txt"

rem *** End of settings - Do not edit below this line ***
```

## Example: Upload 2 files and run 2 imports

This example uploads two text files and imports the data into two different modules.

```
@echo off
rem This example uploads two text files imports the data into two modules.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Europe P&L.txt" -put "C:\testdata\Europe P&L.txt" -import "P&L from Europe P&L.txt" -execute -output "C:\testdata\Europe P&L Errors.txt"
-file "Europe Employees.txt" -put "C:\testdata\Europe Employees.txt" -import "Employee Details from Europe Employees.txt" -execute -output
"C:\testdata\Employee Errors.txt"
```

```
rem *** End of settings - Do not edit below this line ***
```

## Example: List workspaces using certificate-based authentication

This example displays the list of accessible workspaces for the authenticated user.

```
@echo off
rem This example lists a user's workspaces

set Keystore="/path/to/keystore.jks"
set KeystoreAlias="alias"
set KeystorePassword="password"
set Operation="-W"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1
cd %~dp0
set Command=.\AnaplanClient.bat -s %ServiceLocation% -k %Keystore% -ka %KeystoreAlias% -kp %KeystorePassword% %Operation%
@echo %Command%
cmd /c %Command%
pause
```

## Example: Export data to a text file or Excel file

First do a dry run, in which you run the export manually and create the export definition, then edit the batch file to automate this process.

### ***First run the export manually***

1. Open the relevant module, choose **Data>Export**.
2. Click on **Save Export Definition** and give it a name. Typically name the Export ID after the file you are exporting to: E.g. *Income Statement.xls*. This will be used as the name of the Export ID when editing the batch file.

Export

Layout and Content:

- Grid - current page
- Grid - all pages
- Tabular - Multiple Data Columns - All Line Items: P&L
- Tabular - Single Data Column - All Line Items: P&L
- Tabular - Single Data Column - Current Line Item: P&L - Product Revenue
- Omit empty rows from export

File Type:

- Microsoft Excel (.xls)
- Preserve Formatting
- Text (.txt)
- Comma Separated Values (.csv)

Save export definition

Export name:

Export Cancel

3. Run the export and **Save** the file onto your local PC in a known path such as *C:\testdata\Income Statement.xls*.

### ***Then edit and run the batch file***

1. Copy the sample batch file named “export-windows” in the examples folder *C:\anaplan-connect-1-0-44\examples* to the parent folder *C:\anaplan-connect-1-0-44*.
2. **Right-click** and **Rename** the batch file to a name of your choice E.g. *RunMyExport*
3. Edit the batch file as shown below:

```
@echo off
rem This example exports the data from a module to a text file, then downloads it to your hard drive.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-export "Income Statement.xls" -execute -get "C:\testdata\Income Statement.xls"

rem *** End of settings - Do not edit below this line ***
```

4. Run the batch file: Double click *RunMyExport*. If the export file already exists, it will be overwritten when the batch file is run.

Income Statement.xls [Compatibility Mode] - Microsoft Excel												
B3 123456												
York	Budget	C	D	E	F	G	H	I	J	K	L	M
	Jan 12	Feb 12	Mar 12	Q1 FY12	Apr 12	May 12	Jun 12	Q2 FY12	Jul 12	Aug 12	Sep 12	Q3 FY12
Product Revenue	123,456	154,328	154,328	432,112	154,328	154,328	154,328	462,984	154,328	154,328	154,328	462,984
Sales adjustment	-632.3	-632.3	-632.3	-1,897	-632.3	-632.3	-632.3	-1,897	-632.3	-632.3	-632.3	-1,897
<b>Gross product sales</b>	122,824	153,696	153,696	430,215	153,696	153,696	153,696	461,087	153,696	153,696	153,696	461,087
Installation income	9,551	9,551	9,551	28,654	9,551	9,551	9,551	28,654	9,551	9,551	9,551	28,654
Delivery income	6,753	6,753	6,753	20,258	6,753	6,753	6,753	20,258	6,753	6,753	6,753	20,258
Store markdowns	-443.3	-443.3	-443.3	-1,330	-443.3	-443.3	-443.3	-1,330	-443.3	-443.3	-443.3	-1,330
Save & Multibuys	-699	-699	-699	-2,097	-699	-699	-699	-2,097	-699	-699	-699	-2,097
Product markdowns	-1,142	-1,142	-1,142	-3,427	-1,142	-1,142	-1,142	-3,427	-1,142	-1,142	-1,142	-3,427
Installation markdowns	-489.7	-489.7	-489.7	-1,469	-489.7	-489.7	-489.7	-1,469	-489.7	-489.7	-489.7	-1,469
Markdowns	-1,632	-1,632	-1,632	-4,896	-1,632	-1,632	-1,632	-4,896	-1,632	-1,632	-1,632	-4,896
<b>Gross sales</b>	137,495	168,367	168,367	474,230	168,367	168,367	168,367	505,102	168,367	168,367	168,367	505,102
Staff / group discount	-378.3	-378.3	-378.3	-1,135	-378.3	-378.3	-378.3	-1,135	-378.3	-378.3	-378.3	-1,135
OAP discount	-324.7	-324.7	-324.7	-974	-324.7	-324.7	-324.7	-974	-324.7	-324.7	-324.7	-974
Trade card discount	-6,966	-6,966	-6,966	-20,898	-6,966	-6,966	-6,966	-20,898	-6,966	-6,966	-6,966	-20,898
Trade rebates	-2,555	-2,555	-2,555	-7,665	-2,555	-2,555	-2,555	-7,665	-2,555	-2,555	-2,555	-7,665
Trade discount	-9,521	-9,521	-9,521	-28,563	-9,521	-9,521	-9,521	-28,563	-9,521	-9,521	-9,521	-28,563
Discounts for corporate events	-57.6	-57.6	-57.6	-172.8	-57.6	-57.6	-57.6	-172.8	-57.6	-57.6	-57.6	-172.8
Revamp relaunch discount	-119	-119	-119	-356.9	-119	-119	-119	-356.9	-119	-119	-119	-356.9
Debit card adjustments	178.6	178.6	178.6	535.8	178.6	178.6	178.6	535.8	178.6	178.6	178.6	535.8



## Example: Run the export, but do not download

This example runs the export on the Anaplan Server but does not download the text file or Excel file to your local hard drive.

```
@echo off
rem This example runs the export but does not download it to your local PC.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-export "Income Statement.xls" -execute

rem *** End of settings - Do not edit below this line ***
```

## Example: Download the results from an export that has already been run

This example downloads the data to your local hard drive provided you have already run the export.

```
@echo off
rem This example downloads the data to your local hard drive provided you have already run the export.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-export "Income Statement.xls" -get "C:\testdata\Income Statement.xls"

rem *** End of settings - Do not edit below this line ***
```

## Example: Running a model to model import

This example shows how to run an import that pulls in data from another model. In this example, Data is imported from a module named *Installation Sales* in a model named *Model2*, into the *P&L* module in a model named *MyBudget Model*.

### First run the import manually

1. First run the import manually: **Data > Import > Connect to Anaplan Model** and select a module (or list) as the source of the import.

AndrewGouldLtd : Model2

Home Settings Installation Sales

View Edit Format Data

Installation Income =

	Jan 12	Feb 12	Mar 12
York	12,345	15,000	12,345
Manchester	12,345	12,345	12,345
Portsmouth	12,345	12,345	12,345

2. Take note of the Import ID that will be used in the batch file. E.g. **P&L from Model2 / Installation Sales**.

AndrewGouldLtd : MyBudgetModel

Home Settings P&L

Import: P&L from Model2 / Installation Sales

Mapping Time Organization Versions P&L Line Items

Source	Target
(Column Headers)	Time (2012-01, 2012-02, 2012-03, ...)
Column 1: Organization	Organization (York, Manchester, Portsmouth, ...)
Column 2: Versions	Versions (Actual, Forecast, Budget)
Column 3: Line Items	P&L Line Items (Product Revenue, Sales adjustment, ...)

Organization	Versions	Line Items	Jan 12	Feb 12	Mar 12	Q1 FY12
Total Company	Actual	Installation Income	172830.0	172830.0	172830.0	518490.0
Total Company	Forecast	Installation Income	172830.0	172830.0	172830.0	518490.0
UK	Actual	Installation Income	74070.0	74070.0	74070.0	222210.0
UK	Forecast	Installation Income	74070.0	74070.0	74070.0	222210.0
York	Actual	Installation Income	12345.0	12345.0	12345.0	37035.0

Import ID

3. Click **Run Import**.

### ***Then edit and run the batch file***

This example runs a model to model import within Anaplan, transferring data from the *Installation Sales* module in *Model2* to the *P&L* module in *MyBudgetModel*.

```
@echo off
rem This example runs a model to model import within Anaplan

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-import "P&L from Model2 / Installation Sales" -execute

rem *** End of settings - Do not edit below this line ***
```

Note there is a space before and after the /

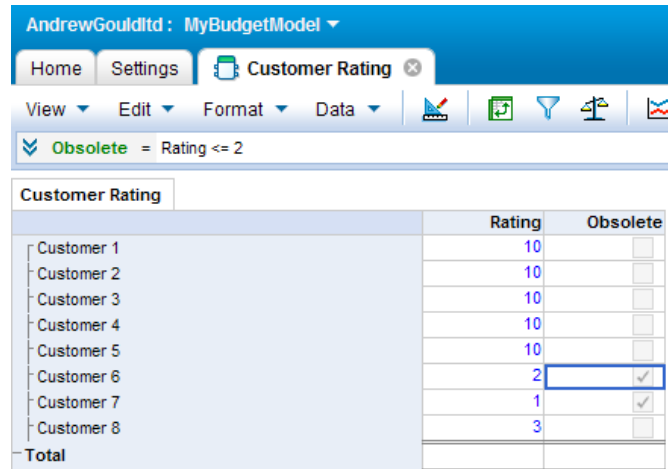
## Example: Deleting Items from a List

This example shows how to automate the process of deleting items from a list based on a criteria.

For example, you might want to automatically delete items in a list that are now obsolete. The screenshot below shows an example in which customers are deemed to be obsolete if the rating is less than or equal to 2. The 'Obsolete' line item is of Boolean data type and has been set up to be a formula:

*Obsolete = Rating <= 2*

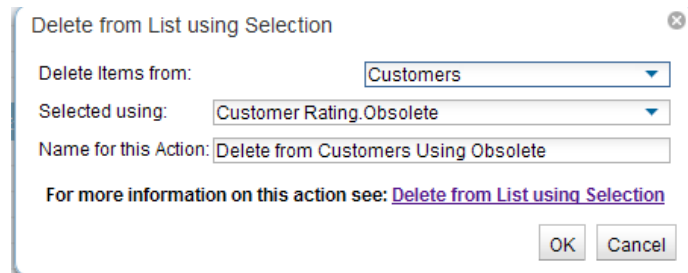
Line items of Boolean data type that only have the dimensionality of the list, can be used as a criteria to determine which items to delete. In this example, customers 6 and 7 are deemed to be obsolete because they have a rating less than or equal to 2..



Customer Rating	Rating	Obsolete
Customer 1	10	<input type="checkbox"/>
Customer 2	10	<input type="checkbox"/>
Customer 3	10	<input type="checkbox"/>
Customer 4	10	<input type="checkbox"/>
Customer 5	10	<input type="checkbox"/>
Customer 6	2	<input checked="" type="checkbox"/>
Customer 7	1	<input checked="" type="checkbox"/>
Customer 8	3	<input type="checkbox"/>
Total		

On the Settings tab, choose **Actions>New Action>Delete from List using Selection**.

Select the list such as *Customers* and the line item that contains the selection criteria E.g. *Customer Rating.Obsolete*



Delete from List using Selection

Delete Items from: Customers

Selected using: Customer Rating.Obsolete

Name for this Action: Delete from Customers Using Obsolete

For more information on this action see: [Delete from List using Selection](#)

OK Cancel

The action will appear under 'Other Actions' at the bottom of the list:

Actions	
New Action ▾ Run Edit Delete Move Manage Import Data Sources Refresh	
	Action
<b>Processes</b>	
Import Salesforce Opportunities	
<b>Imports</b>	
Employee Details from Europe Employees.txt	Import into Employee Details
P&L from Europe Employees.txt	Import into 'P&L'
P&L from Europe P&L.txt	Import into 'P&L'
Organization from Europe P&L.txt	Import into Organization
P&L from Model2 / Installation Sales	Import into 'P&L'
Products from Products.txt	Import into Products
<b>Exports</b>	
Income Statement.xls	Export from 'P&L'
P&L - Product Revenue.txt	Export from 'P&L'
New Income Statement.xls	Export from 'P&L'
Sales Forecast.xls	Export from Sales Forecast
Employee Calc.xls	Export from Employee Calc
Employee Details.xls	Export from Employee Details
Overhead Costs.xls	Export from Overhead Costs
P&L.xls	Export from 'P&L'
Organization.xls	Export from Organization
Products.xls	Export from Products
Employees.xls	Export from Employees
<b>Other Actions</b>	
Delete from Customers Using Obsolete	Delete from List using Selection
Delete from Products Using Obsolete?	Delete from List using Selection

Action to delete obsolete customers

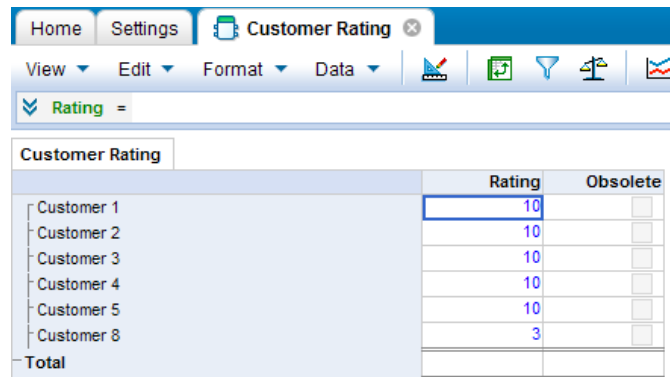
The action can be used in the batch file as shown:

```
@echo off
rem This example deletes obsolete customers from a list

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-action "Delete from Customers Using Obsolete" -execute

rem *** End of settings - Do not edit below this line ***
```

After running the action, just the customers that have a rating of 3 or higher remain.



Customer Rating	Rating	Obsolete
Customer 1	10	<input type="checkbox"/>
Customer 2	10	<input type="checkbox"/>
Customer 3	10	<input type="checkbox"/>
Customer 4	10	<input type="checkbox"/>
Customer 5	10	<input type="checkbox"/>
Customer 8	3	<input type="checkbox"/>
Total		

Note: Due to the difficulty of leaving ‘orphaned’ subtotals, the “Delete from list using Selection” action is not allowed on lists that have subtotals. However, the delete action does work on lists that contain parent hierarchies and top-level items, just so long as the bottom level hierarchy does not contain summary items itself.

## Passing run-time parameters

Some actions require extra information. For example, having the server retrieve data from Salesforce will require Salesforce credentials if they have not previously been provided and saved against the account in Anaplan. Or an import definition for a module might have a dimension mapped to “Prompt at Runtime”. If you try and run such an import you will likely end up with a message like:

The operation failed.

Please specify the following parameters:

-mappingproperty Version:??

If you provide the suggested parameter (-mappingproperty Version:??) then the client program will prompt the user for a value when the program is run. If you replace the question mark with something else then the user will not be prompted, and that value will be passed for that parameter.

Salesforce imports need the following values specified:

-connectorproperty SALESFORCE\_API/INSTANCE:TEST (if the Salesforce sandbox instance is to be used rather than the Salesforce production instance)

-connectorproperty SALESFORCE\_API/USERID:??

-connectorproperty SALESFORCE\_API/PASSWORD:??

-connectorproperty SALESFORCE\_API/SECURITY\_TOKEN:??

Replace some or all of the question marks with concrete values as necessary, although if run from a batch file the caveats about user credentials in the next section also apply here.

## To schedule an import or export

A batch file that runs the import or export can be scheduled to run at a specific time, as a one-off operation, or weekly/monthly. The scheduler is not part of Anaplan Connect, and the scheduling program and set-up depends on your operating system. The computer will need to be left running while the user is absent for the scheduler to work.

In the batch file, the password will need to be included in the Anaplan user name as shown, but make sure the location is *totally* secure as batch files can be read by anybody.

```
set AnaplanUser=andrewgould@hotmail.co.uk:mysecretpassword
```

Optionally, you may want to remove the **pause** command at the end of the batch file. The **pause** command leaves the messages on the screen that records what the batch file has done.

### **Scheduler for Windows XP**

For example, here are the steps involved on a Windows XP operating system to schedule an import on a specific day and time, once a month:

**Start>All Programs>Accessories>System Tools>Scheduled Tasks>Add Scheduled Tasks>Next>Browse**

*C:\anaplan-connect-1-0-44\RunMyImport*

**Monthly>Next>The First Monday at 05.00> Enter name & password for the PC >Finish**

### **Scheduler for Windows 7**

The Scheduler in Windows 7 is almost the same as XP:

**Start>All Programs>Accessories>System Tools>Task Scheduler>Create Basic Task> Name the task>Next>Set when to trigger the task>Next>Select 'Start a program' and browse to 'C:\anaplan-connect>RunMyImport>Next>Finish**

## JDBC Connectivity

Provided you have the appropriate jdbc driver, you can link directly into Anaplan from databases such as Oracle, Access, MySQL, MS SQL Server or from Excel. Both lists and data can be imported into Anaplan in this way, and combined with a scheduler can be updated on a regular basis, automatically.

```
set Operation=-loadclass "com.mysql.jdbc.Driver" -jdbcurl "jdbc:mysql://localhost/apcustomer" -jdbcuser ??:? -file "Upload from jdbc" -jdbcquery "SELECT * FROM Customers"
```

The additional parameters are as follows:

<b>-loadclass</b> <i>classname</i>	Load a Java class.
<b>-jdbcurl</b> <i>connectionurl</i>	URL for the jdbc connection
<b>-jdbcuser</b> <i>username:password</i>	Specify jdbc username and/or password – see below for options.

<b>-jdbcproperty</b> <i>name:value</i>	Optional, for setting any other properties. If value is ? then prompt for the value
<b>-jdbcquery</b> <i>"SELECT * FROM mytable"</i>	SQL statement for the data to query and upload
<b>-jdbcquery</b> <i>@myquery.sql</i>	location of file containing SQL statement for the data to query and upload

Note that -loadclass is only needed for older (pre JDBC 4.0) drivers - the MySQL driver does not need it, nor should the ODBC bridge driver .

Handling for username/passwords is fairly flexible, since some jdbc sources may not need these. If no user name or password is required by the source then omit the **-jdbcuser** parameter

<b>-jdbcuser</b> <i>michael</i>	Username = michael, no password required
<b>-jdbcuser</b> <i>michael:?</i>	Username = michael, prompt for password
<b>-jdbcuser</b> <i>?:?</i>	Prompt for both username and password
<b>-jdbcuser</b> <i>michael:mypassword</i>	Username = michael, password = mypassword

You can set additional properties if needed using -jdbcproperty. The property name can also be 'user' or 'password', and these are equivalent of setting these properties using -jdbcuser, but also allow for a username containing ":"

-jdbcproperty user:fred:smith

-jdbcproperty password:?

## SQL statement examples

*SELECT \* FROM table WHERE column1 > 0* Selects all the columns in the table but omits any row that is 0 in column1

*SELECT \* FROM table WHERE column1 > 0 OR column2 > 0* Selects all the columns in the table but omits any row that is 0 in both column1 and column2

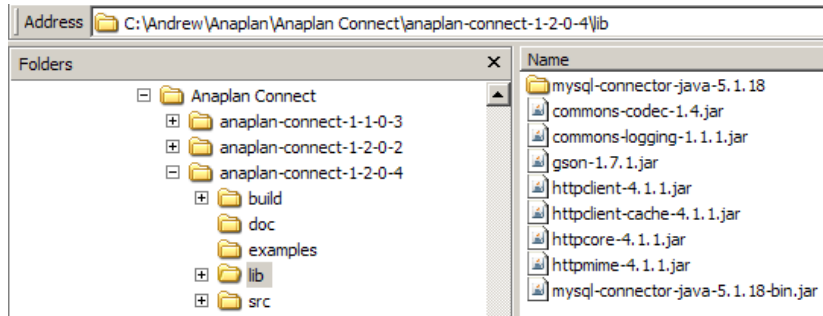
*SELECT \* FROM versions WHERE versions = 'Actual'* Selects all the columns but only the rows that have the value 'Actual' in the versions column

For samples of SQL queries, there are a number of publicly available internet sites, such as: <http://www.w3schools.com/sql/default.asp>



## Example: Loading from MySQL databases

1. For a MySQL database, a JDBC MySQL driver needs to be downloaded. The .jar file that contains the driver needs to be downloaded into the Anaplan Connect lib folder. For example mysql-connector-java-5.1.18-bin.jar has been copied into the lib folder as the driver for version 5.5 of MySQL database. A direct JDBC driver (from a .jar file) is always preferable over the JDBC-ODBC bridge, which should only be used if no JDBC driver is available.



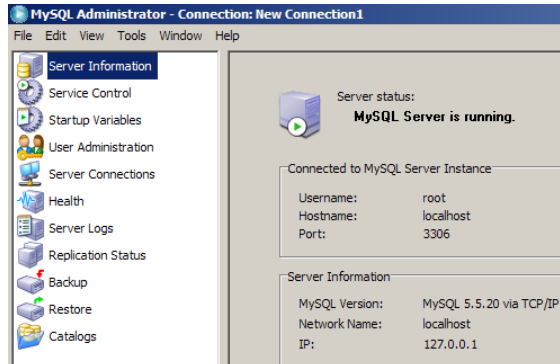
Driver for MySQL database

2. Edit and rename the example.bat file in a similar manner to the one shown below. The example loads into Anaplan all the records from a table named *mytable* in a database named *test*. In this example, you would be prompted for both the database password (jdbc password) and the Anaplan password as neither are contained in the batch file. `-jdbcurl "jdbc:mysql://localhost/test"`. In this case the first two parts (`jdbc:mysql:`) remain fixed, the final part is the hostname and name of the database.

```
@echo off
rem This example loads a table from a SQL database into Anaplan using a jdbc driver.

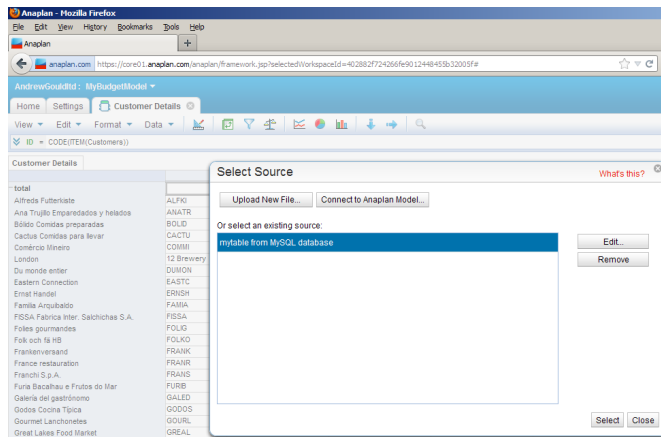
set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "mytable from MySQL database" -jdbcurl "jdbc:mysql://localhost/test" -jdbcuser "root:?" -jdbcquery "SELECT * FROM mytable"

rem *** End of settings - Do not edit below this line ***
```



-jdbcuser "root:?" This is the database username, in this example 'root'. The suffix of :? means prompt for the database password at runtime.

3. In Anaplan, open a module and choose **Data>Import**. The table from the MySQL database will appear as a source. **Select** this and run the import through as per usual.



4. The batch file can now be edited (optional) so that import is run as part of the operation line.

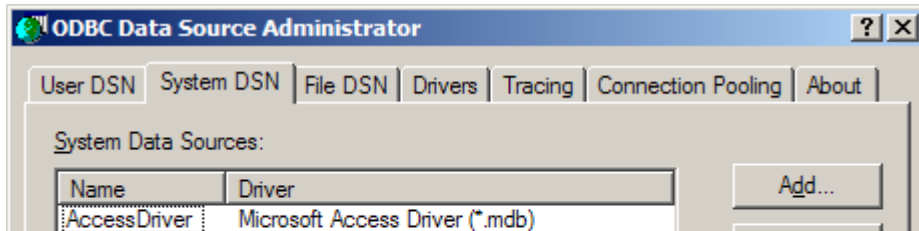
## Example: Load a table from an Access Database into Anaplan

To get Anaplan Connect to link directly to a database using a jdbc driver, the only line that needs changing in the .bat and .sh files is the Operation one. This example uploads a table from an Access database to Anaplan.

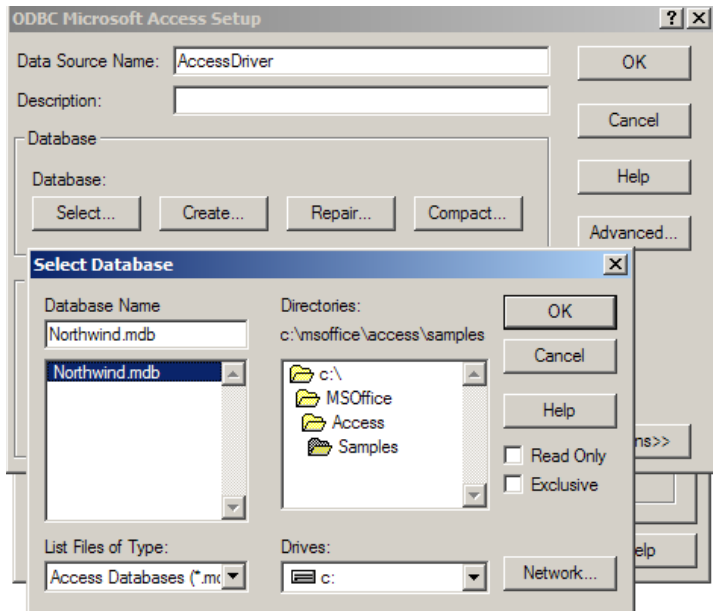
1. The first thing to do is set up an ODBC connection. For example in Windows XP choose **Start>Control Panel>Administrative Tools>Data Sources(ODBC)**

For windows 7 choose **Start>Control Panel>System and Security>Administrative Tools>Data Sources(ODBC)**

The ODBC you want is a System DSN using the Microsoft Access Driver.



2. Point the driver to the correct database: Click **Configure** then **Select** the correct database path such as `c:\msoffice\access\samples\northwind.mdb`



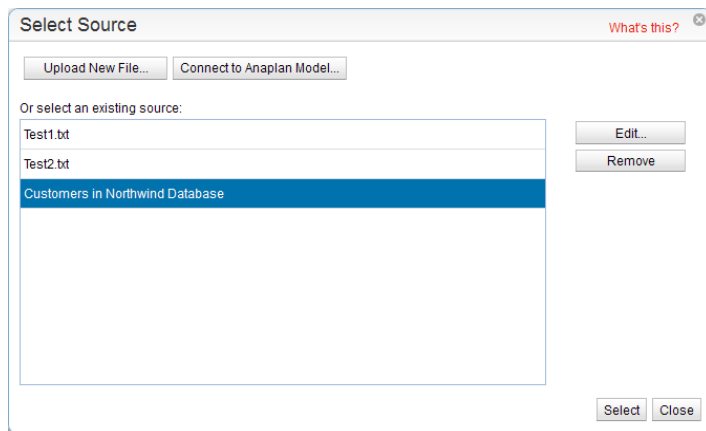
3. Then edit the .bat file so the operation line is similar to the example below. This example loads into Anaplan a table named 'Customers' from an access database 'Northwind.mdb'. Access and Excel can use the standard JDBC/ODBC driver that comes with java, without having to copy a driver (.jar) into the Anaplan Connect Lib folder.

```
@echo off
rem This example loads a table from an Access database into Anaplan using a jdbc driver.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Customers in Northwind Database" -jdbcurl "jdbc:odbc:NorthwindDB" -jdbcquery "SELECT * FROM Customers"

rem *** End of settings - Do not edit below this line ***
```

4. Choose **Data> Import** and the Customer table appears as a data source: 'Customers in Northwind Database'.



5. **Select** the import named 'Customers in Northwind Database' and proceed with the import. If the header row is not correct, it may be changed by clicking **Edit** and selecting the row number for the headers and for the first data row.

Import: Customer Details from Customers in Northwind Database

Mapping Customers Customer Details Line Items

Source Target

Column 1: CustomerID → Customers (Alfreds Futterkiste, Ana Trujillo Emparedados y helados, ...)

(Column Headers) → Customer Details Line Items (Company Name, Contact Name, Contact Title, ...)

CustomerID	CompanyName	ContactName	ContactTitle	Address
ALFKI	Alfreds Futterkiste	Maria Anders	Sales Representative	Obere Str. 57
ANATR	Ana Trujillo Emparedados y helados	Ana Trujillo	Owner	Avda. de la Constitución 2222
ANTON	Antonio Moreno Taquería	Antonio Moreno	Owner	Mataderos 2312
AROUT	Around the Horn	Thomas Hardy	Sales Representative	120 Hanover Sq.
BERGS	Berglunds snabbköp	Christina Berglund	Order Administrator	Berguvsvägen 8
BLAUS	Blauer See Delikatessen	Hanna Moos	Sales Representative	Forsterstr. 57
BLONP	Blondel père et fils	Frédérique Citeaux	Marketing Manager	24, place Kléber
BOLID	Bólido Comidas preparadas	Martín Sommer	Owner	C/ Araquil, 67
BONAP	Bon app'	Laurence Leblan	Owner	12, rue des Bouchers
BOTTM	Bottom-Dollar Markets	Elizabeth Lincoln	Accounting Manager	23 Tsawassen Blvd.
BSBEV	B's Beverages	Victoria Ashworth	Sales Representative	Fauntleroy Circus
CACTU	Cactus Comidas para llevar	Patricio Simpson	Sales Agent	Cerrito 333
CENTC	Centro comercial Moctezuma	Francisco Chang	Marketing Manager	Sierras de Granada 9993
CHOPS	Chop-suey Chinese	Yang Wang	Owner	Hauptstr. 29

6. Once the import has been run once manually, the operation line can be amended so that it runs the import as shown below. This means that the process can be fully integrated: You can upload the table from the database, update the customer list and import the data all in one operation. Using a scheduler, this can be done automatically on a regular basis.

```
@echo off
rem This example loads a table from an Access database into Anaplan using a jdbc driver.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Customers in Northwind Database" -jdbcurl "jdbc:odbc:NorthwindDB" -jdbcquery "SELECT * FROM Customers" -import "Customers from Customers in Northwind Database" -execute -import "Customer Details from Customers in Northwind Database" -execute

rem *** End of settings - Do not edit below this line ***
```

7. The number of items added, renamed and the data cells updated is all shown in the dialog box.

```

C:\WINDOWS\system32\cmd.exe
.\AnaplanClient.bat -user "andrewgould999@hotmail.co.uk" -workspace "AndrewGouldLtd" -model "MyBudgetModel" -file "Customers in Northwind Database" -loadclass "sun.jdbc.odbc.JdbcOdbcDriver" -jdbcurl "jdbc:odbc:NorthwindDB" -jdbcquery "SELECT * FROM Customers" -import "Customers from Customers in Northwind Database" -execute -import "Customer Details from Customers in Northwind Database" -execute
Using C:\Andrew\Anaplan\Anaplan Connect\anaplan-connect-1-2-0-4\anaplan-connect-1-2-0-4.jar
Password:
Transferred 91 records

The operation was successful.
Customers: 7 created / 1 renamed, 0 properties updated

The operation was successful.
Contact Name cells: 96
Contact Title cells: 99
Address cells: 99
City cells: 91
Region cells: 31
Postcode cells: 82
Country cells: 83
Phone cells: 83
Fax cells: 64
Press any key to continue . . . _
  
```

8. The customer list and Customer Details module is updated:

AndrewGouldLtd : MyBudgetModel

Home Settings Customer Details

View Edit Format Data

ID = CODE(ITEM(Customers))

	ID	Contact Name	Contact Title	Address
<b>total</b>				
Alfreds Futterkiste	ALFKI	Maria Anders	Sales Representative	Obere Str. 57
Ana Trujillo Emparedados y helados	ANATR	Ana Trujillo	Owner	Avda. de la Constitución 2222
Bóldo Comidas preparadas	BOLID	Martín Sommer	Owner	C/ Araquil, 67
Cactus Comidas para llevar	CACTU	Patricio Simpson	Sales Agent	Cerrito 333
Comércio Mineiro	COMMI	Pedro Afonso	Sales Associate	Av. dos Lusíadas, 23
London	12 Brewery		WX1 6LT	UK
Du monde entier	DUMON	Janine Labrune	Owner	67, rue des Cinquante Otages
Eastern Connection	EASTC	Ann Devon	Sales Agent	35 King George
Ernst Handel	ERNSH	Roland Mendel	Sales Manager	Kirchgasse 6
Familia Arquibaldo	FAMIA	Aria Cruz	Marketing Assistant	Rua Orós, 92
FISSA Fabrica Inter. Salchichas S.A.	FISSA	Diego Roel	Accounting Manager	C/ Morazarzal, 86
Folies gourmandes	FOLIG	Martine Rancé	Assistant Sales Agent	184, chaussée de Tournai

## Example: Load an Excel Spreadsheet into Anaplan

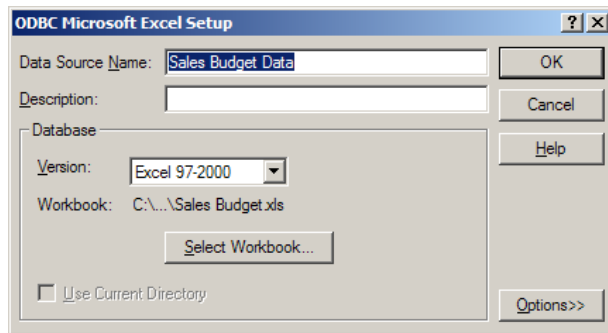
The example below shows an example of loading a sheet from an Excel spreadsheet into Anaplan.

1. Set up an ODBC driver pointing to the excel file:

In Windows XP, choose **Start>Control Panel>Administrative Tools>Data Sources(ODBC)>System DSN**

In Windows 7, choose **Start>Control Panel>System and Security>Administrative Tools>Data Sources(ODBC)> System DSN**

2. Click **Add** and choose **Microsoft Excel Driver**. Name the Data source.E.g. *Sales Budget Data* and **Select Workbook**. Browse for the workbook you want to import E.g. *C:\Testdata\Sales Budget.xls*



Sales Budget		A Product							
		Jan 12	Feb 12	Mar 12	Q1 FY12	Apr 12	May 12	Jun 12	Q2 FY12
3	Alfreda Futterkiste	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
4	Ana Trujillo Emparedados y helados	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
5	Bólido Comidas preparadas	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
6	Cactus Comidas para llevar	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
7	Comércio Mineiro	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
8	London	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
9	Du monde entier	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
10	Eastern Connection	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
11	Ernst Handel	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
12	Familia Arquibaldo	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
13	FBSA Fabrica Inter. Salchichas S.A.	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
14	Foles gourmandes	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
15	Folk och få HB	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
16	Frankenversand	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
17	France restauration	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
18	Franchi S.p.A.	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
19	Furia Bacalhau e Frutos do Mar	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
20	Galeria del gastrónomo	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
21	Godosa Cocina Típica	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702
22	Gourmet Lanchonetes	1,234	1,234	1,234	3,702	1,234	1,234	1,234	3,702

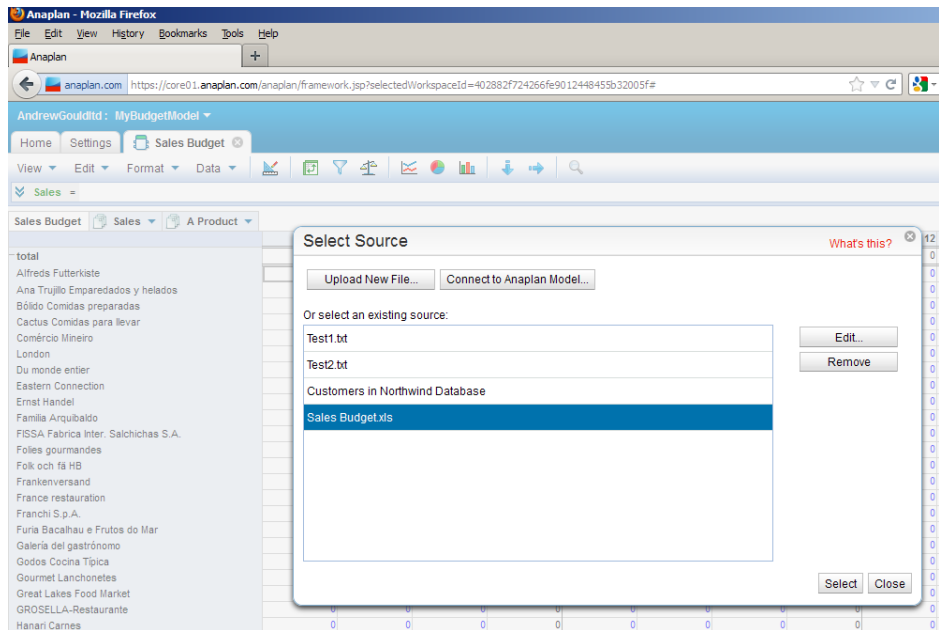
3. Set up the batch file as shown below. This example loads *Sheet 3* from the *Sales Budget.xls*.

```
@echo off
rem This example loads a table from an Access database into Anaplan using a jdbc driver.

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Sales Budget.xls" -jdbcurl "jdbc:odbc:Sales Budget Data" -jdbcquery "SELECT * FROM [Sheet 3$]"

rem *** End of settings - Do not edit below this line ***
```

4. Having loaded the Excel sheet into Anaplan, it can now be used as the source for an import into a list or a module. Open the target module, choose **Data>Import** and select the data source named *Sales Budget.xls*. Then click **Select** and follow the import wizard.





## FAQ

### What about Mac users, Linux and Unix operating systems?

Instead of the batch files, Mac, Linux and Unix users will need to copy and edit a shell script *example.sh* which is to be found in the examples folder.

Copy this into the parent folder containing *Anaplan Client.sh* and save it under a new name such as *RunMyImport.sh*. Edit it using the TextEdit application. To run a shell script on a Mac, right-click on the *RunMyImport.sh* file, **Open With>Other** and browse for **Utilities>Terminal**. If this is greyed out, you will need to choose **Enable>All Applications** and then choose **Terminal**.

To run the shell script, **right-click, Open With>Terminal**

To edit the shell script, **right click, Open With>TextEdit**

The syntax is slightly different but otherwise it is a very similar process.

### Example of a .sh file for use on a Mac

For Mac users, '.sh' files must be used instead of '.bat' files. This example loads a table named sample from a database named Test\_DB into Anaplan.

```
#!/bin/sh
# This example loads a table named sample from a database named Test_DB into Anaplan

AnaplanUser=iain.duffield@anaplan.com
WorkspaceId="Iains Workspace"
ModelId="Anaplan Connect"
Operation="-file 'Upload from MySQL jdbc' -loadclass 'com.mysql.jdbc.Driver' -jdbcurl 'jdbc:mysql://localhost/Test_DB' -jdbcuser 'iain.duffield:?' -jdbcquery 'SELECT * FROM sample'"

# _____ Do not edit below this line _____
if [ "${AnaplanUser}" ]; then
  Credentials="-user ${AnaplanUser}"
fi
Command="./AnaplanClient.sh ${Credentials} -workspace ${WorkspaceId} -model ${ModelId} ${Operation}"
echo "${Command}"
sh -c "${Command}"
```

### Can “.zip” files be used to speed up the upload ?

No point. Anaplan Connect already zips the source text files as part of the upload process, making the use of .zip files unnecessary. For this reason referring to zip files in the source file is not supported.

## Can the source file name be changed, yet still use the same import definition?

Yes. For example the batch file below uses a new file named “**New Europe P&L.txt**”. Provided it is in the same format as the original, the import will still work. Note how the File ID and Import ID remain unchanged. Effectively, it copies “**New Europe P&L.txt**” into the Europe P&L.txt file on the Anaplan server as part of the upload.

```
@echo off
rem This example loads a source text file and runs an Anaplan import into a module. For details of how to configure this script see doc/User Guide
set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Europe P&L.txt" -put "C:\testdata\New Europe P&L.txt" -import "P&L from Europe P&L.txt" -execute -output "C:\testdata\Europe P&L Errors.txt"
rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1
cd %~dp0
if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%
set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model %ModelId% %Operation%
@echo %Command%
cmd /c %Command%
pause
```

## Can relative rather than absolute paths be used for the source file?

Yes. It is possible to refer to a path relative to where the batch file is located: E.g. **-put “examples\ Europe P&L.txt”** will look for a file in the examples folder immediately beneath the Anaplan Connect folder (the folder where the AnaplanClient.bat and your customised batch files are run from). I.e. Anaplan Connect/examples/Europe P&L.txt

```
@echo off
rem This example loads a source text file and runs an Anaplan import into a module. For details of how to configure this script see doc/User Guide

set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=-file "Europe P&L.txt" -put "examples\Europe P&L.txt" -import "P&L from Europe P&L.txt" -execute -output "examples\Europe P&L Errors.txt"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1
cd %~dp0
if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%
set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model %ModelId% %Operation%
```

```
@echo %Command%
cmd /c %Command%
pause
```

## Is it possible to close the window after running a Windows batch file?

Yes, just remove the **pause** command from the end of the batch file.

## Is it possible to list the available import definitions, actions, files, models etc ?

Yes, just set the operation to be – **imports** as shown in the batch file below. This lists all the import definitions that are available in a given model. The list of imports and exports is also available in Anaplan under **Settings>Actions**.

Similarly, to list the available file IDs (on the Anaplan server) use –**files**, for models use –**models**, for workspaces use –**workspaces** and for actions, use –**actions**.

```
@echo off
rem This example lists all the available imports.

Set AnaplanUser="andrewgould@hotmail.co.uk"
set WorkspaceId="AndrewGouldLtd"
set ModelId="MyBudgetModel"
set Operation=imports

rem *** End of settings – Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1
cd %~dp0
if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%
set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model %ModelId% %Operation%
@echo %Command%
cmd /c %Command%
pause
```

## Anaplan Connect batch file does not run successfully. Why not?

If the batch file appears to run OK, but numbers do not appear to come through into Anaplan, try changing page, refreshing the browser or closing and re-opening the target module. It may be that the target module was already open when you ran the batch file. It needs some event to trigger a contact with the Anaplan server, which will then refresh the view with the latest data.

Check the syntax: For example check that variables such as the file name are enclosed in straight double quotes are needed “ ” as typed in notepad, not curly double quotes “ ” which you get when typing in Word. In model to model imports, make sure there is a space before and after the / in the syntax **-import “Target Module from Source Model / Source Module”**.

If you are deleting items from a list, check that the list does not contain summary items or subtotals. Such lists cannot use the delete action owing to the difficulty of dealing with “orphaned” subtotals which no longer have any children. Lists that have parent hierarchies or top level items *can* use the bulk delete action, provided that the list that you are editing does not have subtotals in its own right.

If you are performing a SQL query from a Windows machine with the -jdbcquery option, you need to be careful if using the percent character, eg as the wildcard character in a pattern for the like operator. The Windows command processor may attempt to perform variable substitution on an expression like '%a%', even though no variable a has been defined, resulting in an empty pattern. The percents can be escaped by doubling them up eg like '%%a%%'.

## Where does Anaplan Connect run Java from?

The first place that AnaplanClient.bat looks for a Java install is to look at the JAVA\_HOME value. Installing Java should have set JAVA\_HOME for you, so you should not normally have to do anything further. To check to see that this is set up: **Start>Right-click on My Computer>Properties>Advanced>Environment Variables>New**

Variable name: **JAVA\_HOME**

Variable Value: **C:\Program Files\Java\jre6**

The path you need is the folder one level up from the “C:\Program Files\Java\jre6\bin” folder containing all the Java programs.

If JAVA\_HOME is not set, then the Windows Registry will be queried to find the location of the most recent version of Java.

## Why cannot Anaplan Connect communicate with the Anaplan servers when my browser can?

In some – mostly corporate – environments, all access to the internet is channelled through a proxy server. If this is the case, Anaplan Connect might not necessarily be able to detect the location and type of the proxy in use. If you know these details you can specify them using the -via option – this accepts a URL which must start with either http: or socks:.

If you do not know the settings or they are liable to change frequently, Anaplan Connect can make use of a free, open-source, third-party library called Proxy Vole if it is available. This looks for the settings in different places depending on what operating system it is installed on, which browser is the default browser, etc. It is not included with Anaplan Connect distribution as it is distributed under a slightly different license, but it can be downloaded from <http://code.google.com/p/proxy-vole/> - unzip the binary version and place the jar file in Anaplan Connect's lib directory, and Anaplan Connect will use it automatically.

## Why do I get a “HTTP status 407: Proxy Authentication Required” message?

Some proxy servers require a username and password to be provided in order to access the internet through them. These can be specified using the -viauser option.

There are several different authentication schemes – Anaplan Connect supports basic and digest authentication out of the box, but for NTLM authentication it is recommended that the open-source JCIFS library be installed. It is not included with Anaplan Connect distribution as it is distributed under a slightly different license, but can be downloaded from <http://jcifs.samba.org/> - get the latest 1.3.x jar file and install it in Anaplan Connect's lib directory.