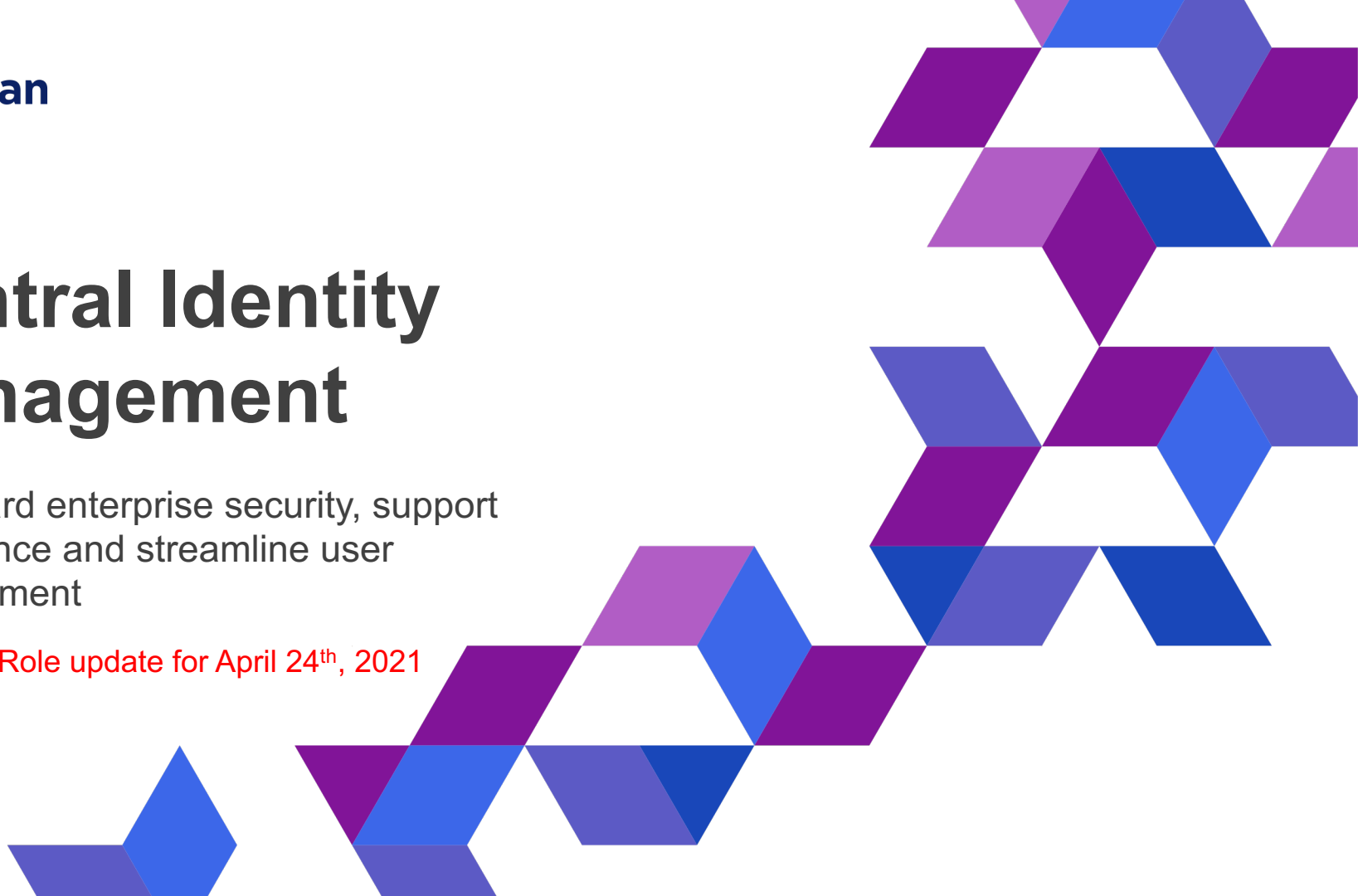




# Central Identity Management

Safeguard enterprise security, support compliance and streamline user management

User Admin Role update for April 24<sup>th</sup>, 2021



# Disclaimer

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decision. The development, release, and timing of any features or functionality described for Anaplan's products remains at the sole discretion of Anaplan.

# Agenda

01

Overview

02

Features and Benefits

03

What's Changing & Your New Options

04

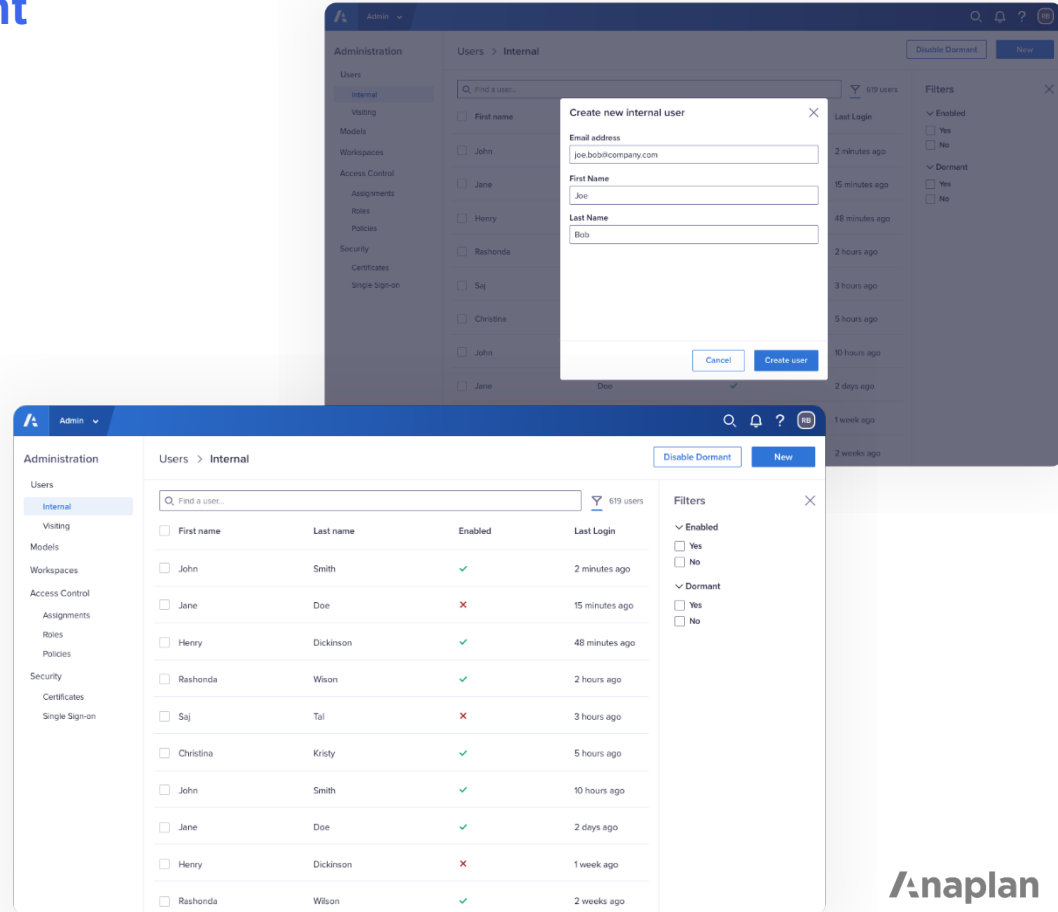
FAQ & QA



# Overview

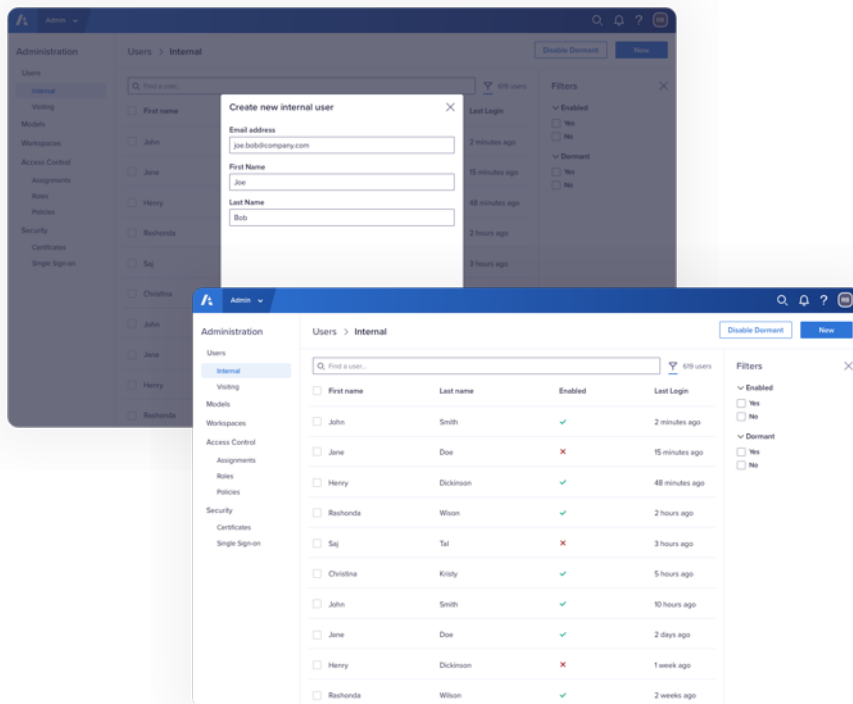
# Safeguard enterprise security, support compliance, and streamline user management

- **Compliant management:** Enforce segregation of duties within the user interface
- **Centralized visibility:** Centralized interface provides granular visibility and control via a single pane of glass
- **Efficient control:** Simplify and streamline user access management to save time, costs and boost productivity



# What's being deployed with Centralized Identity Management (CIM)

- CIM is being deployed in multiple phases, beginning in March 2021
- **March 5th:** Phase-1 introduction of new “User Admin” role to manage tenant user access
  - No change in Workspace Admin (WSA) entitlement
- **April 24th:** Phase-2 to centralize in one UI the ability to manage all users in the tenant
  - Option to manually add users to the tenant and assign to Workspaces



# What's has and hasn't changed and your new options in CIM

Assign a User Admin:

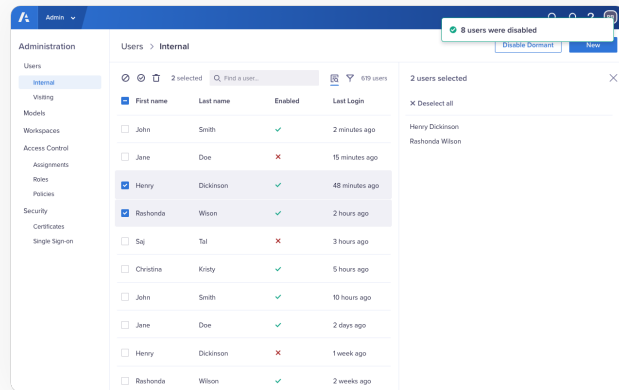
- If you have a Tenant Admin role, the Tenant Admin should:
  - Start to assign someone within their organization the User Admin role *soon after* Phase 2 is released on April 24.
- If you do NOT have a Tenant Admin role, you should:
  - Start to assign Tenant Admin **AND** User Admin roles to individuals in your organization *soon after* Phase 2 is released on April 24.

What's changed and your new options:

- The ability to add users manually and assign to Workspace(s) by the User Admin (UA)
- The ability to remove users from Workspace(s) by the User Admin (UA)
- The ability to disable user across the Tenant by the User Admin (UA) or Tenant Admin (TA)

What's **NOT** changed:

- Add/Update/Remove users manually as a Workspace Admin (WSA)
- Add/Update users via file import as a Workspace Admin (WSA)
- Add/Update users via saved view import as a Workspace Admin (WSA)

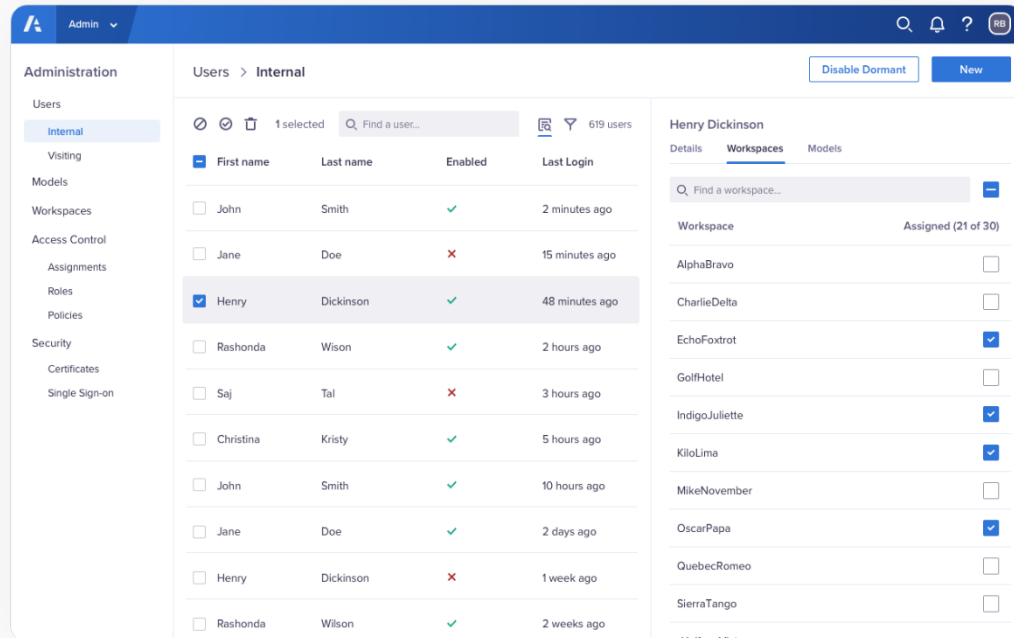


# Features & Benefits

# Compliance: User Admin for Segregation of Duties (SOD)

## Segregate user management via a new role

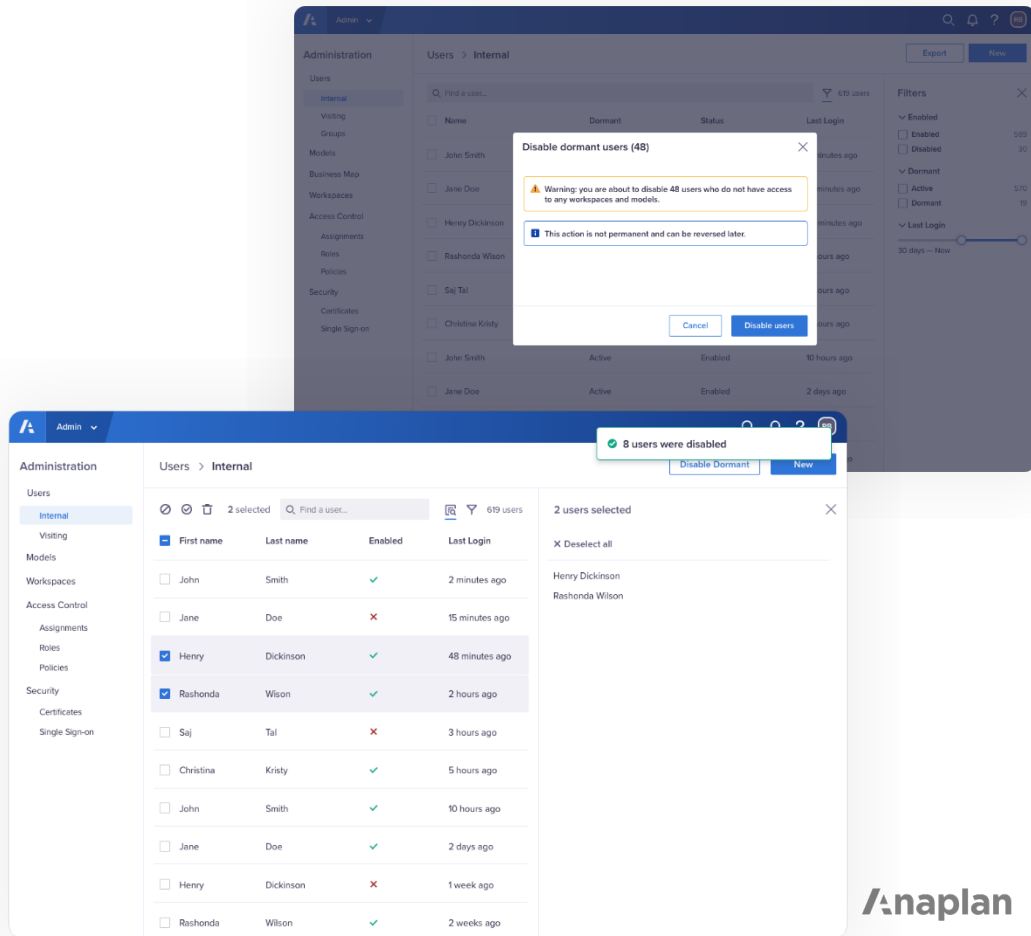
- New user admin role allows admins to authorize user access and centrally manage users
- New user admin will soon be the only role enabled to assign and remove users to a workspace from Admin Console
- Workspace Administrator can focus on model building and workspace administration activities




# User Management: Create, update, disable (CRUD) Users

## Increase security oversight with flexibility to centrally manage user access

- Manage users centrally to create, update, and disable users from the Admin Console
- View and edit user identity at tenant level for centralized visibility
- Enable easy onboarding and removal for temporary users including implementation teams and contractors
- Enable advanced sorting by status, name, and last login
- Disable users temporarily while preserving access settings



# How Tenant Admin makes an existing user a User Admin (video)

 Home ▾

▾ 🔍 🔔 ? cJ

Welcome, **Connie**

Models My Pages Apps

Recently visited

▾ Models

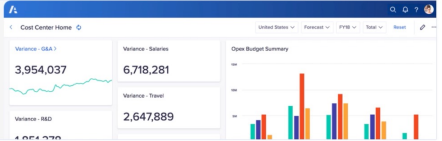
You have no models yet

Experience the New Anaplan >


Anaplan has made connected planning easier than ever

Our intuitive interface seamlessly connects people, plans, and data across devices.


[Get started](#) [Learn more](#)




Favorites



You have no favorites yet



# How Tenant Admin makes a net new user a User Admin (video)

 Home ▾

▾ 🔍 🔔 ? cJ

Welcome, Connie

Models My Pages Apps

Recently visited

▾ Models

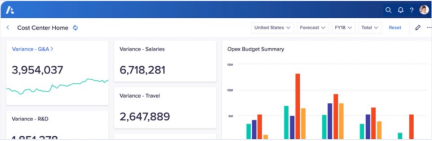
You have no models yet

Experience the New Anaplan >


Anaplan has made connected planning easier than ever

Our intuitive interface seamlessly connects people, plans, and data across devices.


Get started Learn more



Favorites



You have no favorites yet



# What's Changing & Your New Options

# What's changing and your new options in CIM

Phase 2 of CIM will be released on April 24, which will allow the User Admin to:

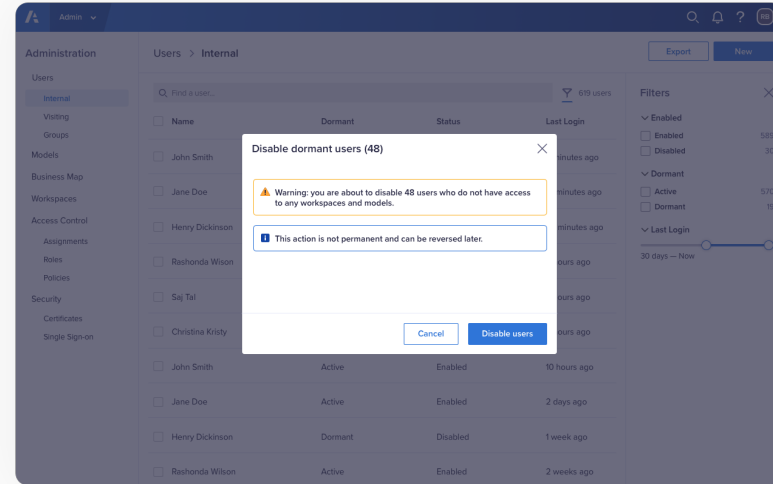
- **Create users**
- **Add users to and remove users from workspaces**
- **manage users**

There will be no impact at this time to your Workspace Admin's capabilities, meaning both WSAs and User Admins can create, add, or remove users in the same environment.

While you don't have to immediately implement the following changes, ***we encourage you to:***

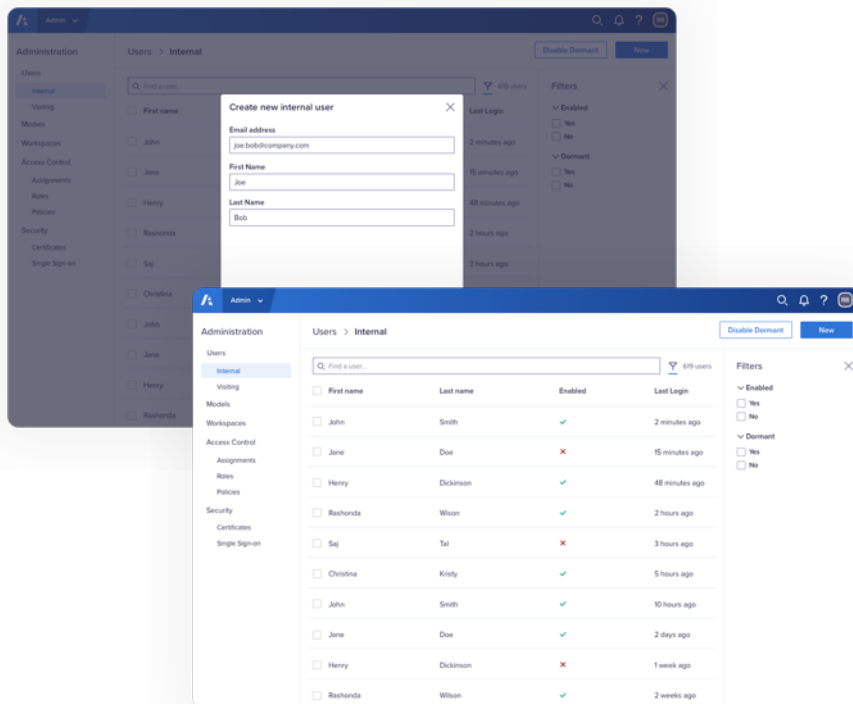
- **Assign someone as a User Admin to become familiar with the new role**
- **Understand how this phase helps with segregation of duties**
- **Increase security visibility with a centralized dashboard**

To reap the benefits of segregation of duties as soon as possible.



# What's being deployed with Centralized Identity Management (CIM)

- CIM is being deployed in multiple phases, beginning in March 2021
- **March 5th:** Phase-1 introduction of new “User Admin” role to manage tenant user access
  - No change in Workspace Admin (WSA) entitlement
- **April 24th:** Phase-2 to centralize in one UI the ability to manage all users in the tenant
  - Option to manually add users to the tenant and assign to Workspaces



## What's New: User Admin role is assigned by the Tenant Admin

The screenshot displays the Anaplan Administration interface. On the left, a navigation menu lists various sections: Home, Apps, My Pages, Models, Tasks, Process Builder, DocuSign, Administration (highlighted with a blue box), CloudWorks, and App Hub. The main content area is titled 'Administration' and contains a table of 'Assignments'. The table has columns for First Name, Last Name, Role, and Email. A row for 'Elizabeth Schera' is highlighted, showing her role as 'User Admin'. Below the table, a modal window for 'Elizabeth Schera' is open, showing a list of roles. The 'User Admin' role is selected with a checked checkbox, while other roles like 'Page Builder', 'Business Partner', 'Tenant Security Admin', and 'Integration Admin' are unchecked. The modal also includes a 'Tenant' field and 'Cancel' and 'Save' buttons.

First Name	Last Name	Role	Email
Elizabeth	Schera	User Admin	elizabeth.schera@anaplan.com
Elizabeth	Schera	Tenant Admin, Process Owner, Page Builder, Workspace Admin, User Ad...	elizabeth.schera@anaplan.com
Elizabeth	Schera	Standard	elizabeth.schera@anaplan.com

Elizabeth Schera

Tenant: Elizabeth Schera

Roles:

- ☐ Page Builder
- ☐ Business Partner
- ☐ Tenant Security Admin
- ☐ Integration Admin
- ☒ User Admin

Cancel Save

Tenant Admin will still be responsible for assigning the Page Builder and other Tenant Roles.

Note: Visitors (BP, Partner, SA) cannot be **User Admins** – recommendation is that an **alias or customer email** is created and used by the visitors when customers require visitors to add/remove users

## New Options: Adding users

After April 24<sup>th</sup>, Phase 2 CIM – Manually adding users can be done by either the User Admin (UA) or the Workspace Admin (WSA)

	Adding user		Assign Model Role, Selective Access & Single Sign-On		Assigning Workspace Admin	
	Current	Phase 2	Current	Phase 2	Current	Phase 2
Add user manually	WSA	UA or WSA	WSA	WSA	WSA	WSA

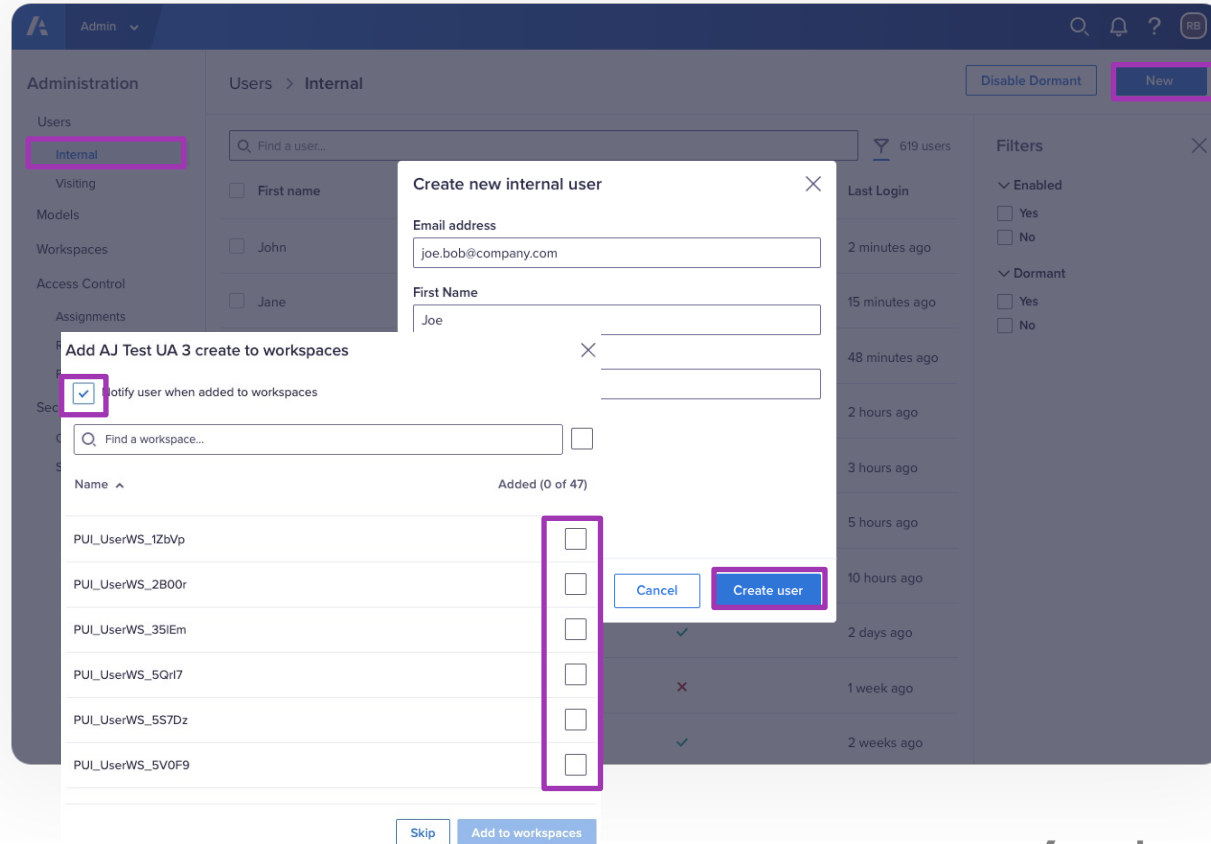
When a user is added to a Workspace by the **UA**, the user will default to **'No Access'** as the Model Role. In order to complete the user set up the **WSA** will to enable the remaining model permissions.

1. Administration Menu (**User Admin – UA**)
  - UA create the user in the admin console
  - UA assigns the user to workspace(s)
2. User Settings in Models (**Workspace Admin – WSA**)
  - WSA will updates roles, selective access & Single Sign-On either manually or via import
  - WSA updates Workspace Admin privileges manually

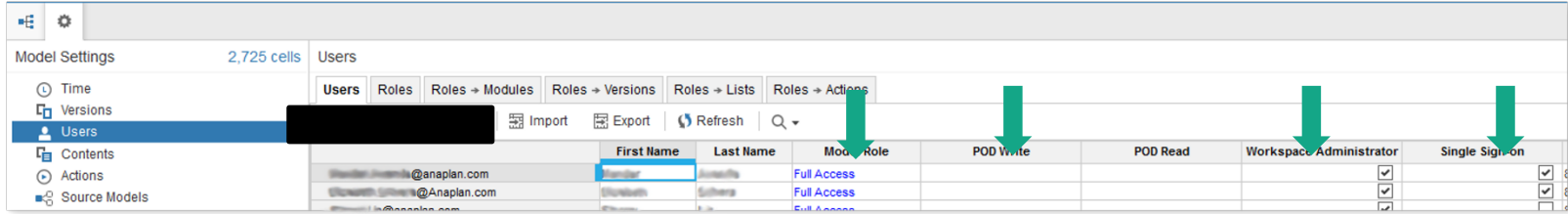
## Step 1/2: Add user manually User Admin

- **User Admins** add user to the Tenant in the Administration Screen
- **User Admin** adds users to appropriate Workspace(s) – (Role is set to No Access in each Model within the assigned Workspace)
- Users are sent an email listing the Workspace(s) they are able to access
- The **User Admin** is able to disable the automated notifications to users

Note: Visitors are invited via the Visiting page



## Step 2/2: Update user **Workspace Admin**



The screenshot shows the 'Users' table in the Anaplan interface. The table has columns for First Name, Last Name, Model Role, POD Write, POD Read, Workspace Administrator, and Single Sign-on. Four green arrows point to the 'Model Role', 'POD Write', 'Workspace Administrator', and 'Single Sign-on' columns, indicating the fields that need to be updated for the 'Workspace Admin' role.

	First Name	Last Name	Model Role	POD Write	POD Read	Workspace Administrator	Single Sign-on
Shantanu.Sharma@anaplan.com	Shantanu	Sharma	Full Access			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Shantanu.Sharma@anaplan.com	Shantanu	Sharma	Full Access			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Shantanu.Sharma@anaplan.com	Shantanu	Sharma	Full Access			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

After the user is added by the **User Admin**, the **Workspace Admin** updates Model Role, Selective Access, Single Sign-On, and Workspace Admin privileges for each Model in the Workspace as appropriate

Note: **Workspace Admins** are **not** notified when a user is added

## New Options: Remove user access

After April 24<sup>th</sup>, Phase 2 CIM – Removing a user from a workspace will be done in the **User Admin Console**

		User access		Workspace Admin	
		Current	Phase 2	Current	Phase 2
1	Remove user from workspace(s) manually	WSA	UA or WSA	WSA	WSA
2	Disable user from tenant manually	Tenant Admin	Tenant Admin or UA	N/A	N/A

**User Admin – UA** Console options to remove users from a Workspace(s)

- UA unchecks Workspace(s) from user
- UA disables users across the Tenant

# 1: Remove users manually User Admin

- **User Admin** updates workspace assignments to delete/remove user from workspace(s)

Note: This will remove the users from the users list in those workspace(s).

The screenshot displays the Anaplan User Admin interface. On the left, the 'Administration' sidebar is visible with categories like Users, Models, Workspaces, Access Control, Roles, Policies, Security, Certificates, and Single Sign-on. The 'Users' section is expanded, and the 'Internal' tab is selected. The main area shows a list of users under 'Users > Internal'. A search bar at the top right of the list allows finding a user. A table lists users with columns for selection, first name, last name, enabled status, and last login. Henry Dickinson is selected. On the right, the 'Details' panel for Henry Dickinson is shown, with the 'Workspaces' tab active. It lists assigned workspaces with checkboxes for removal. A purple box highlights the removal checkboxes for AlphaBravo, CharlieDelta, EchoFoxtrot, GolfHotel, IndigoJuliette, KiloLima, MikeNovember, OscarPapa, QuebecRomeo, and SierraTango.

	First name	Last name	Enabled	Last Login
<input type="checkbox"/>	John	Smith	✓	2 minutes ago
<input type="checkbox"/>	Jane	Doe	✗	15 minutes ago
<input checked="" type="checkbox"/>	Henry	Dickinson	✓	48 minutes ago
<input type="checkbox"/>	Rashonda	Wilson	✓	2 hours ago
<input type="checkbox"/>	Saj	Tal	✗	3 hours ago
<input type="checkbox"/>	Christina	Kristy	✓	5 hours ago
<input type="checkbox"/>	John	Smith	✓	10 hours ago
<input type="checkbox"/>	Jane	Doe	✓	2 days ago
<input type="checkbox"/>	Henry	Dickinson	✗	1 week ago
<input type="checkbox"/>	Rashonda	Wilson	✓	2 weeks ago

Workspace	Assigned (2 of 30)
AlphaBravo	<input type="checkbox"/>
CharlieDelta	<input type="checkbox"/>
EchoFoxtrot	<input checked="" type="checkbox"/>
GolfHotel	<input type="checkbox"/>
IndigoJuliette	<input checked="" type="checkbox"/>
KiloLima	<input checked="" type="checkbox"/>
MikeNovember	<input type="checkbox"/>
OscarPapa	<input checked="" type="checkbox"/>
QuebecRomeo	<input type="checkbox"/>
SierraTango	<input type="checkbox"/>

## 2: Disable user manually User Admin

- **User Admin** disables selected users across the full tenant

### Notes:

1. A disabled user will retain their Model permissions, but will not be able to access any model in the tenant.
2. Visitors **cannot** be disabled, but they can be removed from all workspaces

The screenshot shows the Anaplan User Admin interface. On the left is a navigation menu with categories: Administration, Users, Visitors, Models, Business Map, Workspaces, Access Control, Assignments, Roles, Policies, and Security. The 'Users' section is expanded, showing 'Internal' as the selected group. The main area displays a table of users with columns: First name, Last name, Enabled, and Last Login. A search bar and '2 selected' indicator are at the top of the table. A purple box highlights the 'Disable' icon (a circle with a diagonal line) in the table's header row. Another purple box highlights the row for 'Henry Dickinson', which is currently enabled (green checkmark). To the right of the table, a sidebar shows '2 users selected' and lists 'Henry Dickinson' and 'Rashonda Wilson'. At the top right of the interface are buttons for 'Disable Dormant' and 'New'.

First name	Last name	Enabled	Last Login	
<input type="checkbox"/>	John	Smith	✓	2 minutes ago
<input type="checkbox"/>	Jane	Doe	✗	15 minutes ago
<input checked="" type="checkbox"/>	Henry	Dickinson	✓	48 minutes ago
<input checked="" type="checkbox"/>	Rashonda	Wilson	✓	2 hours ago
<input type="checkbox"/>	Saj	Tal	✗	3 hours ago
<input type="checkbox"/>	Christina	Kristy	✓	5 hours ago
<input type="checkbox"/>	John	Smith	✓	10 hours ago
<input type="checkbox"/>	Jane	Doe	✓	2 days ago
<input type="checkbox"/>	Henry	Dickinson	✗	1 week ago
<input type="checkbox"/>	Rashonda	Wilson	✓	2 weeks ago

# FAQ & QA

## Frequently asked questions

**We have security applications that invoke the Bulk import action in models today. How will CIM impact those applications?**

Any bulk updates being performed via the import action in models will not be impacted by CIM.



## Frequently asked questions

### **Can customers “opt out” of CIM?**

While Customers will have some time to transition to CIM, eventually CIM and CIM APIs will be the only way to create/update/delete users. Therefore, customers should start to prepare for the transition as soon as feasible.

### **Is there any ability to surface model roles in CIM?**

You cannot surface model roles in CIM. Model roles represent authorization or access to dimensions and data. This differs from identity management, which involves updating user identities and associating them with workspaces.



## Frequently asked questions

**What is the future of the Tenant Admin role now that the User Admin role is available?**

The Tenant Admin role is responsible for assigning users to Administration roles. The User Admin role is responsible for creating users in the tenant and assigning them to workspaces. The Tenant Admin role will continue to be supported.



## Frequently asked questions

### **Can I assign the User Admin Role to multiple users?**

Yes, you can assign User Admin Role to multiple users such as Tenant Security Admin, Page Builder, Tenant Admin, View Admin..etc.

### **Can a user have multiple Admin roles?**

Yes, a user can have multiple Admin roles, for example, Tenant Admin and User Admin roles, or the Workspace Admin and User Admin roles.



## Frequently asked questions

### **Can I assign the User Admin Role to multiple users?**

Yes, you can assign User Admin Role to multiple users, similar to Tenant Security Admin, Page Builder, Tenant Admin, View Admin..etc.



## Frequently asked questions

### **Does CIM has an impact on current automation of user setup?**

No, one of the requirements in rolling out the CIM capability was that existing customer integrations cannot be disrupted. This means that customers using the import capabilities into models will continue to be able to run those processes with no changes needed so as not to disrupt the automation of user setup.



**Thank you!**