Disclosure Management application

Tell the story behind your numbers with speed and confidence

Anaplan

Ready for the next-gen solution in financial reporting?

If you are struggling with errors, risks, and inefficiencies in your statutory reporting process, from annual reports to annual filings, then it's time to embrace our disclosure management and narrative reporting solution that eliminates endless emails, proofreading, and competing versions.

Anaplan Disclosure Management application not only meets required statutory reporting but also produces high-quality reports for all internal and external stakeholders.

Transform reporting

Optimized for the evolving needs of the office of finance, our Disclosure Management application facilitates effortless report generation and publication within the familiar Microsoft Office environment, leveraging your existing architecture, software, and data for quick report setup. Rapidly produce annual reports, statutory filings, board books, investor decks, and more in significantly less time while ensuring accuracy and compliance.

Anaplan Disclosure Management application delivers these benefits:

Transformed reporting:
Reduce the time it takes to report today and gain greater accuracy and integrity in your numbers.

Greater collaboration:
Allow multiple contributors to work on the same document concurrently across teams, functions, and regions.

Business-owned:
Achieve full control, no IT needed, to quickly produce your reports in a familiar Microsoft Office environment.

Rapid deployment:
Realize value faster with the ability to go live in as little as two weeks.

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We were considering a solution that would
have cost a significant amount and taken months to
implement. Between its out-of-the-box functionality,
Office integration, and how our finance team can
manage the entire reporting process, we quickly
realized how much more we'd benefit from Anaplan
Disclosure Management application."

CFO
WonderFi Technologies

Anaplan Disclosure Management application produces enterprise-grade, audit-ready reports and enables users to:

- Create financial and other documents that meet internal and external requirements such as board books, 10K, 10Q, annual reports, ESG reports, and more

- Integrate data from multiple sources — ERP, finance and operational systems, and more — into the same document(s) to eliminate manual uploads and stale data

- Perform automated, un-attended synchronization of documents with data coming from external sources so your narratives, charts, and tables always reflect live data

- Allow concurrent activities on different parts of a document, including co-authoring of shared document sections

- Automate workflow and notifications from creation to approval and distribution to streamline reporting

- Easily track changes with system managed version histories

- Handle documents in multiple languages with automated translation of text and delimiters of numeric values

- Feed different iXBRL and ESG tagging tools

- Enable dynamic text, data and table updates, and roll-forward functionality to eliminate copy-paste errors

- Apply financial intelligence to collected data, like scaling, rounding, currency, and more

- Check data consistency across different documents and/or different paragraphs, sections, within the same document

- Manage user permission, report visibility and assignments, audit trails, and version histories to ensure secure collaboration and transparency

The Anaplan platform offers

- **True out-of-the box calculations, logic, and rules that go beyond templates and starter kits** to handle the complexity of your reporting process.

- **Built-in dashboards, reporting, and analytics** with data visualization providing a comprehensive view on financial position.

- **Collaborative and agile consolidation and reporting** across the enterprise. Workflow and prebuilt task types make it easy to automate everything from data loads to Teams notifications.

- Best-in-class **security and compliance** with role-based access control, user management, and SSO support with SAML 2.0 compliance, and data encryption.

- **A highly extensible ecosystem** — collect and analyze data in a single location using APIs, ETL connectors, and built-in integrations with other solutions.

About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

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