IBM Business Analytics

Upgrade Planning

TM1 10.2 to Planning Analytics Local

Upgrade Planning

Program Overview & Goals

Program Overview

- Improvements to TM1's existing functionalities
- Differences between TM1 and Planning Analytics
- High level architecture of Planning Analytics
- Highlights of Planning Analytics Workspace & Planning Analytics for Excel functionality
- Installation considerations & Conformance review
- Upgrade Check list

Program Goals

- Quickly get started with upgrade planning
- Implement upgrade best practice
- Successful upgrade

Why upgrade?

- 1. Standard Support for IBM Cognos TM1 10.2.x ends on September 30, 2019
 - No more fixes will be provided for TM1 10.2.x or its client interfaces
 - See details <u>here</u>
- 2. Planning Analytics = TM1 version 11
 - Newer development, compatibility and conformance are being focused with Planning Analytics
 - See what else is included in Planning Analytics: <u>https://www.ibm.com/products/planning-analytics</u>
- 3. It is simple to upgrade

Step 1	Step 2	Step 3	Step 4	Step 5
Install Planning Analytics	Copy TM1 Database(s)	Install Client Interfaces	Validate	Go Live!

See the top 5 reasons why you want to upgrade <u>here</u>

Improvements with TM1 Server and TM1 Web

TM1 Server has added:

- Multiple hierarchy support
- Multithreaded cube load, multithreaded feeder load
- Many features to reduce lock contention:
 - VersionedListControl
 - ReduceCubeLockingOnMetadataChange
- RunProcess allows TI processes to be executed in parallel
- More TM1 Rest API options

And more...

TM1 Web Performance improved:

- Superior scrolling performance
- WAN performance improvements
- Dynamic merged cells consistent with Excel
- Selection through freeze panes
- Auto-sizing row height for wrapped cells on edit

Planning Analytics and TM1

Planning Analytics encompasses the entire product offering that includes:

- TM1 Server
- TM1 Web
- PA Workspace
- PA for Excel (replaces CAFÉ)
- and other legacy interfaces

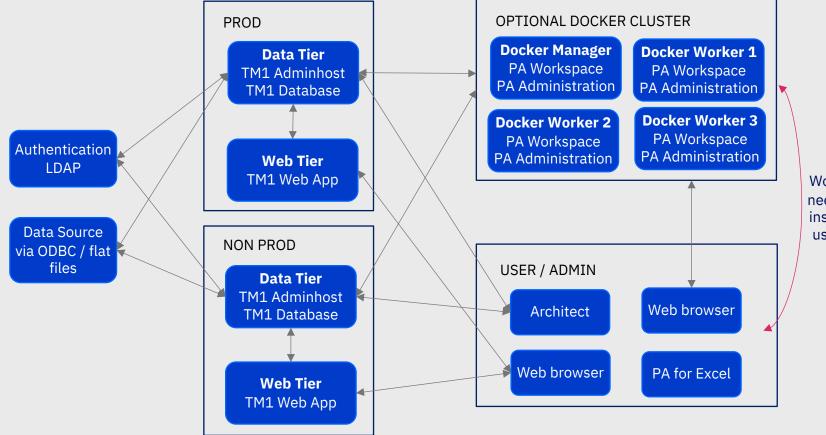
PA introduces improved methods and tools, but all existing TM1 sheets and applications will function in PA as is with no additional effort

PA follows the version scheme of 2.0.x with a quarterly release cycle (example 2.0.7)

PA Workspace and PA for Excel follow the version scheme of 2.0.xx with a 4-6 week release cycle (example 2.0.42)

Product	TM1 10.2.x	PA Local	Additional Information
TM1 Server	x	x	Core database engine
TM1 Perspectives	x	x	Legacy Excel add-in Most functionality is in PA for Excel
CAFE	x		Replaced with PA for Excel
TM1 Web	x	x	New look, faster and improved stability
TM1 Applications	x	x	
TM1 Mobile Contributor	x		Not supported in PA Local
Operation Console	x		Replaced with PAA (Planning Analytics Administration)
Planning Analytics Workspace		х	New web based interface
Planning Analytics for Excel		х	New Excel add-in
Cognos Command Center		x	Task orchestration
Cognos Integration Server		x	Data extract automation

Planning Analytics Architecture



Workspace needs to be installed to use PA for Excel

Planning Analytics Workspace

New web-based interface for Planning Analytics

Covers functionalities (replacing legacy clients)

- Write back and reporting (TM1Web)
- Administration (Architect)
- Modeling (Architect, Performance Modeler)
- Monitoring (Operation Console)
- Work with websheets (TM1Web)
- Create visualizations and dashboards
- Use snap commands
- Hierarchies for more flexible modeling

Note:

- Required to use Planning Analytics for Excel
- Installation requires Docker



Planning Analytics for Excel

New Microsoft Excel add-in for TM1 database replacing CAFÉ.

- Superior performance over WAN driven by REST API meaning no Citrix needed
- Shares components with PA Workspace
- TM1 functions based reports, Active Forms and Flex Views
- Publishes reports to TM1 Web and PA Workspace as websheets
- Support new Hierarchies features

Four different report types

- Exploration slice/dice/pivot analysis
- Quick Reports fast worksheet design
- Dynamic Reports row interactivity (zero suppression, expand, collapse)
- Custom Reports highly formatted forms and reports

FILE HOME INSE		- C	✓ Commit &	Cient J C	MDX	E Conver		• E Rename		
Connect Task	Open Publish Exploration Li	st Action Refresh	X Discard	Snapshot * 🙍 🖡 Drill Through * 🔽 🕼	Design Mod			Clone () Merge -		
 Pane Getting Started 	Content Add	Button Sheet *	Data	Dhii Thiough -	 Vaj use server n Explo 			sel merge -		
IBM				Deill Th	rough: Revenue					
Version Version (list)		Base	~		lough: Revenue					
C14 * : >	Crganiz Massa	cation	Product Product T	Channel Channel T.	O Yes	. (Version Budget			
			Month MY	Chamiler 1.			Budget			Q
IBM Demos		Jan	Feb	Mar A	pr Ma	y Jun	Jul	Aug	Sep	
IDM Demos	Unit Net Sales Price	113.79	223.32	272.64			1.97 304.2		302.41	
smartco Workbook	Volume - Units	9,649	4,587	3,183			,991 3,02		3,155	
BudgetFro BudgetFro BudgetVa	Unit Direct Cost									
🖲 😪 Compensa	Gross Margin %	70.33	144.75	186.81			8.41 207.0		210.37	
B-St. Currency B-St. Currency (Gross Margin % Gross Margin	38.19%	35.18%				98% 31.969		30.44%	
🖲 🕄 Default	Gross Margin Gross Revenue	419,355	360,374				,841 294,11		290,401	
B Deprecatio B Deprecatio	Total Cost of G	1,097,975	1,024,279				,235 920,31		954,154	
🖲 🤀 Expenses	Total Cost of G Direct COGS	678,620	663,905				,395 626,19		663,753	
Forecast b FTE by Mo		635,720	621,005				,495 583,29		620,853	
🖲 😪 Gross Mar	Indirect C	42,900	42,900	42,900			,900 42,90		42,900	
8-32 High Leve	Gross Revenue	1,097,975	1,024,279	867,944	867,161 93	33,265 903	,235 920,31	1 931,170	954,154	
B 0 0	-				These book	-				1
	<		1				e	I T		
	anda Newsel, New		1				C	I T	×	
	anda Newsel, New	heet 1 +]				C	10 T	E	
	0109] ·			_	C	⊡ T		
anan talama dari kor	0109	heet 1 +] #L		_	_	C	I T		
unant is ann tiù a' foa	0109) •		_	_	C	□ T		
u nami to assemble ^{or A} fore comoverilo toe	0109	Bunnary P	misation	Germany		_		• T		
o contra accontra d'Alera conscanto los glocations	0109	Bunnary P				_		• T		
oran la secreta el ford carecardo tes Analysis	0109	Bunnary P	misation	Garrange 4 Loop 1						
o card to assert to all from correctedo to photomo Analysis OFE Excessive	0109	Bummary P Orgo	misation	Germany		_		. T	Ĩ	
u aur la anne à a' Agu cannardh ce phratians Analpsis Catribution	0109	Bummary P Orgo Union	anization chuefts	Carrency - Local PT Actuals		n Luipi i	a a a a a a a a a a a a a a a a a a a			
taret is assemble "Apr torecards to photosa Andysis CART Deservice Castribution Castribution	0109	Bummary P Orgo	anization chuefts	Garrange 4 Loop 1	No. Vie Vier Vier					
arear to assert a 1474 oreasards to phaties Analysis Cast Mation Cast Mation Cast Mation Cast Mation	0109	Bummary P Orgo Team Draw Team	anization sciumits	Carrony Loss Pf Actuals	2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	eh F Facigar	201 201 50 6.10(21)	ws sin		
ormania ormania to fotos	0109	Bummary P Org Toos Door Team	eniastion actuality	Garrange Loop - PF Actuals 11-102-20	2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	et Edge 1 1.50.50	ant ant anti-	Wr1 din din		
ormante os pletime Cartinete Cartinete Cartinete Cartinete Cartinete Seponte Seponte Seponte Seponte Seconary	0109	Bummary P Org Team Deam Researce Cost of Lane Deam Researce	eniastion actuality	Garrange Loop - PF Actuals 11-102-20	10000 10000 10100 10100	et Edge 1 1.50.50	ant ant anti-	Wr1 din din		
concerning operations Analysis CAPE Expension Cantel backs Disports is fook? John is fook? John is fook? John is Disports is D	0109	Burnmary P Grap Vesso Described Controller C	ariadion citositis	Carrony Loss Principal Line Vision Line Vision Vision Vision Vision Vision Vision Vision	No. 10 No. 10 No	ek Redget = + 301,244 1.380,244 0.61,258 0.61,258	900 910 910 910 910 910 910 910 910 910	din din din din din din		
ormania organizationa deallans Andysis CAPE Essensise Canti Makan Gaponte Reports Beakt Ale Beakt Ale Schemmel Russi Spense revise	0109	Buttomary P Orgo Texes Deservation Deserva	ariadion citositis	Corresp Loss - Photos Line Los Line Los	1000 1000 1000 1000 1000 1000 1000 100	08. 9.527.341 1.00.541 0.62.75 0.65	1000 1000 1000 1000 1000 1000 1000	404 404 404 404 404 404 404 404 404 404	E	
ormania de dans de dans Andreis Carlo Exercise Carlo Exercise Carlo Exercise Carlo Exercise Carlo Exercise Comment P Dans Separts Sepa		Buttomary P Brann Recall Draw Testing Const Testing Description Description Testing Chara Experient Testing Chara Experient Testing Construction	ariadion citositis	5 Line	10000 10000 10100 10100 10100 10100 10100 10100 10100 10100 10100 10100	nte Redger × 1,200,101 1,200,1000,10	1000 1011 1000 1011 1011 1011 1011 101	Wr5 418 418 418 118 118		
orrecards or phrateses Andysis Cert Desensites Cantrobation Cantrobati		Buttomary P Orgo Texes Deservation Deserva	ariadion citositis	Corresp Loss - Photos Line Los Line Los	1000 1000 1000 1000 1000 1000 1000 100	08. 9.527.341 1.00.541 0.62.75 0.65	1000 1000 1000 1000 1000 1000 1000	404 404 404 404 404 404 404 404 404 404		
ormante os pletimes Andynis Casti delares Casti delares Casti delares Gaponte Reporte 9 Rock Ante 9 Communitary 9 Depense recent 9 Depense rec		Bummary P Orge Team Down Readys Control Readys Cont	enication schools n n	Currency Loss - Pf Antasis Unics - Unics - Uni	No. 10 No. 10 No	00	2011 2011 2011 2011 2011 2011 2011 2011			
orrecards to photoses Analysis CHE Exercise Cardebates Cardebates Composite Composite Separate Department Depa		Burnmary P Organisation Control Teams Control Teams Contro	enication schools n n	Carrony - Loss - Marine - Marin	10000 10000 10000 10000 10000 10000 10000 10000 10000 10000 10000 10000	eb 	201 201 201 201 201 201 201 201 201 201	din din din din din din din din din din	. E	
ormania organizational dealers Andynia CHFE Excercise CHFE Excerci	N Michaels also	Burnmary P Drys Team Don Team One Team One Team One Team David Server Team One Team One Team One Team One Team	enication schools n n	Carming 1.000 19.0000 19.0000000000	No. 10 No. 10 No	ek 	100 201 201 201 2010 2010 2010 2010 201	404 404 405 406 406 406 405 406 405 405 405		
correction de la construcción de	M M M M M M M M M M M M M M M M M M M	Burnmary P Organisation Control Teams Control Teams Contro	enication schools n n	Carrony - Loss - Marine - Marin	1000 1000 1000 1000 1000 1000 1000 100	eb 	201 201 201 201 201 201 201 201 201 201	din din din din din din din din din din		
concords to photose Andysis CAPE Describe Cantibutes Ca	M M M M M M M M M M M M M M M M M M M	Resemently P Brees Brees Core of Brees Core of Brees Particia Core of Brees Core of Br	ariation arisests a a a a a a a a a a a a a a a a a a	Carming 1.507 194 (clash 1.507 1.	1000 1000 1000 1000 1000 1000 1000 100	ett. Redger × 0.429.54 4.209.54 4.209.54 4.209 0.429 0.429 0.429 1.209.40 1.209.40 1.209.40 1.209.40 1.209.40	1000 01100 0100 0000	405 405 405 405 405 405 405 405 405 405		
orrecords to glutares Andreis Carti Datas Carti Datas Carti Datas Cartination	M M M M M M M M M M M M M M M M M M M	Boostern Gross Reset Gross Res	ariation arisests a a a a a a a a a a a a a a a a a a	6 (1993)	1000 1000 1000 1000 1000 1000 1000 100	ek 0.427.34 0.429.34 1.380,54 0.429 0.4	1000 2011 2012 2012 2012 2012 2012 2012	405 405 405 405 405 405 405 405 405 405		
orrecords to photoms Andysis CAPE Describe Cardebatos C	M M M M M M M M M M M M M M M M M M M	Resemently P Brees Brees Core of Brees Core of Brees Particia Core of Brees Core of Br	ariation arisests a a a a a a a a a a a a a a a a a a	Carming 1.507 194 (clash 1.507 1.	1000 1000 1000 1000 1000 1000 1000 100	ett. Redger × 0.429.54 4.209.54 4.209.54 4.209 0.429 0.429 0.429 1.209.40 1.209.40 1.209.40 1.209.40 1.209.40	1000 01100 0100 0000	405 405 405 405 405 405 405 405 405 405		
overconts to phaten Antypis Cart Dates Cart Dates Cart Dates Cart Dates Cart Dates Cart Dates Cart Dates Cart Dates Cart Dates Consentany Conse	M M M M M M M M M M M M M M M M M M M	Resemently P Brees Brees Core of Brees Core of Brees Particia Core of Brees Core of Br	ariation arisests a a a a a a a a a a a a a a a a a a	Carming 1.507 194 (clash 1.507 1.	1000 1000 1000 1000 1000 1000 1000 100	ett. Redger × 0.429.54 4.209.54 4.209.54 4.209 0.429 0.429 1.209 1.209.40 1.209.40 1.209.40 1.209.40 1.209.40	1000 01100 0100 000 000 000 000000	405 405 405 405 405 405 405 405 405 405	0	
	N HitCharts all News Hatts	Resemently P Brees Brees Core of Brees Core of Brees Particia Core of Brees Core of Br	ariation arisests a a a a a a a a a a a a a a a a a a	Carming 1.507 194 (clash 1.507 1.	1000 1000 1000 1000 1000 1000 1000 100	ett. Redger × 0.429.54 4.209.54 4.209.54 4.209 0.429 0.429 1.209 1.209.40 1.209.40 1.209.40 1.209.40 1.209.40	1000 01100 0100 000 000 000 000000	405 405 405 405 405 405 405 405 405 405		

Compatibility and hardware requirement

Supported Environments

You can create a <u>Software Product Compatibility Report</u> which will help to answer your questions:

- 1. Detailed system requirements. It will provide information on supported operating systems, related software, hypervisors, and hardware requirements.
- 2. Hardware requirements. Find out the required hardware for a product you are interested in.
- 3. End of service. Find out the end of service dates for the products you have in mind.

Supported Operating System

- RHEL PA Workspace and TM1 Server only
- Windows 2016 and 2019 (PA Workspace NOT supported on Windows 2019)

PA Workspace

Minimum Hardware:

• 4 core / 8 GB RAM / 200 GB hard disk (minimum of 3 for PAW distributed) **Recommended Hardware:**

• 8 core / 16 GB RAM / 200 GB hard disk (minimum of 3 for PAW distributed) Money is no object hardware

• 8 core+ / 16 GB RAM + / 200 GB+ hard disk (6 recommended for PAW distributed)

Project Phase

Assess	Provision	Install PA	Copy TM1 database	Install Clients	Validate Cut Over & Go Live
 Identify stakeholders Create project plan Review software environment and compatibility report Identify the dependencies with other source database Create testing specification Set go live date 	 Check cores, memory and hard disk space Install updates and features (OS patches, .NET, services) Update the virus scan software 	 Uninstall all TM1 software and clean all the files if reusing existing server, then reboot Install PA software including TM1 server and the admin tools Implement 	 Disable chores Stop TM1 database Compress all the directories (excluding logs) and copy over Uncompress 	 PA Workspace Install PA Workspace Configure with URIs and authenticati on mode PA for Excel 	 Validate Functional test Performance test User Acceptance test Cut Over
 Determine Client software to install (TM1Web, PA Workspace, PA for Excel) Install location (existing, new) Determine the deployment (single computer, distributed) Number of environments (prod, qa, dev) Hardware and specification Authentication method (TM1 native, CAM) Distribution method of PA for Excel to users (manual, remote) 	 Check and update the firewall as needed Check the network 	 authentication (CAM if the sec mode = 5) Compare all configuration (TM1s, TM1Web), validate and change as needed Create ODBC connections to other database as needed 	 billionipless the directories in the target environment Modify the config (tm1s.cfg) for adminhost, port numbers, CAM URIs Start TM1 database Enable chores 	 Install PA for Excel in user PC Add connections to target TM1 Modify the config 	Go Live



C

Base Product Installation & Configuration

Planning your installation

You can decide how to install and configure IBM Planning Analytics Local to provide the best possible performance. The installation and configuration choices that you make depend on your requirements, resources, and preferences.

Planning Analytics Local architecture

To understand the architecture of the major IBM Planning Analytics Local components, you should be familiar with your information technology infrastructure and with the business needs of people in your organization who will use Planning Analytics Local.

Deploying Planning Analytics Local

You can install and deploy components on a single computer or across multiple computers.

Upgrading Planning Analytics Local

You should upgrade an earlier version of IBM Cognos TM1 to the current version of IBM Planning Analytics in stages. Follow these basic steps to upgrade.

Installing Planning Analytics Local on a singlecomputer

This type of installation puts Planning Analytics on a single computer running the Microsoft Windows operating system and using default settings. Use this kind of installation to get up and running quickly with Planning Analytics or to install a test or evaluation environment.

Installing Planning Analytics Local Data Tier

You can install Data Tier components using the IBM Planning Analytics Local installation program.

Installing Planning Analytics Local Web Tier

You can install Web Tier components using the IBM Planning Analytics Local installation program.

Installing Planning Analytics Local Rich Tier

You can install Rich Tier components using the IBM Planning Analytics Local installation program or the TM1 client installation program.

PA for Workspace Installation & Configuration

Prerequisites

Before you install IBM Planning Analytics Workspace, you must install IBM Planning Analytics Local 2.0.0 or later.

Install Docker

Planning Analytics Workspace Local runs in a Docker container. You must install the version of Docker that is supported by your operating system.

Install Planning Analytics Workspace Local

You can install Planning Analytics Workspace Local directly on Microsoft Windows Server 2016 OS or RHEL OS.

Connect Planning Analytics Workspace Local to Cognos TM1 and authentication servers

You must use the Planning Analytics Workspace administration tool to configure the Cognos® TM1® URIs that point to the Cognos TM1 servers and authentication servers.

Configure Planning Analytics Workspace Local parameters

You can change the configuration of Planning Analytics Workspace Local by modifying a PAW configuration file.

Other Available Programs		
Program	Duration	
 Workspace Installation Assistance Remote help with Workspace installation on Docker for non-prod environment (completion of pre-requisite required), including: Workspace installation Connecting to PA for Excel 	1 day	
 Testing Methodology Guidance Provide remote guidance on testing methodology, including: What to test Available tools 	Up to 2 hours	



Additional Help

Support Offerings Products Cas	ses Forums FAQ		Open a case
	How can w	ve help you?	
	Q Search support with Watson		
⊻			8
L Fix Central	Support Cases	Notifications	E IBM Support Guide