

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 [here](#)
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: <https://www.ibm.com/products/planning-analytics>
3. It is simple to upgrade



See the top 5 reasons why you want to upgrade [here](#)

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

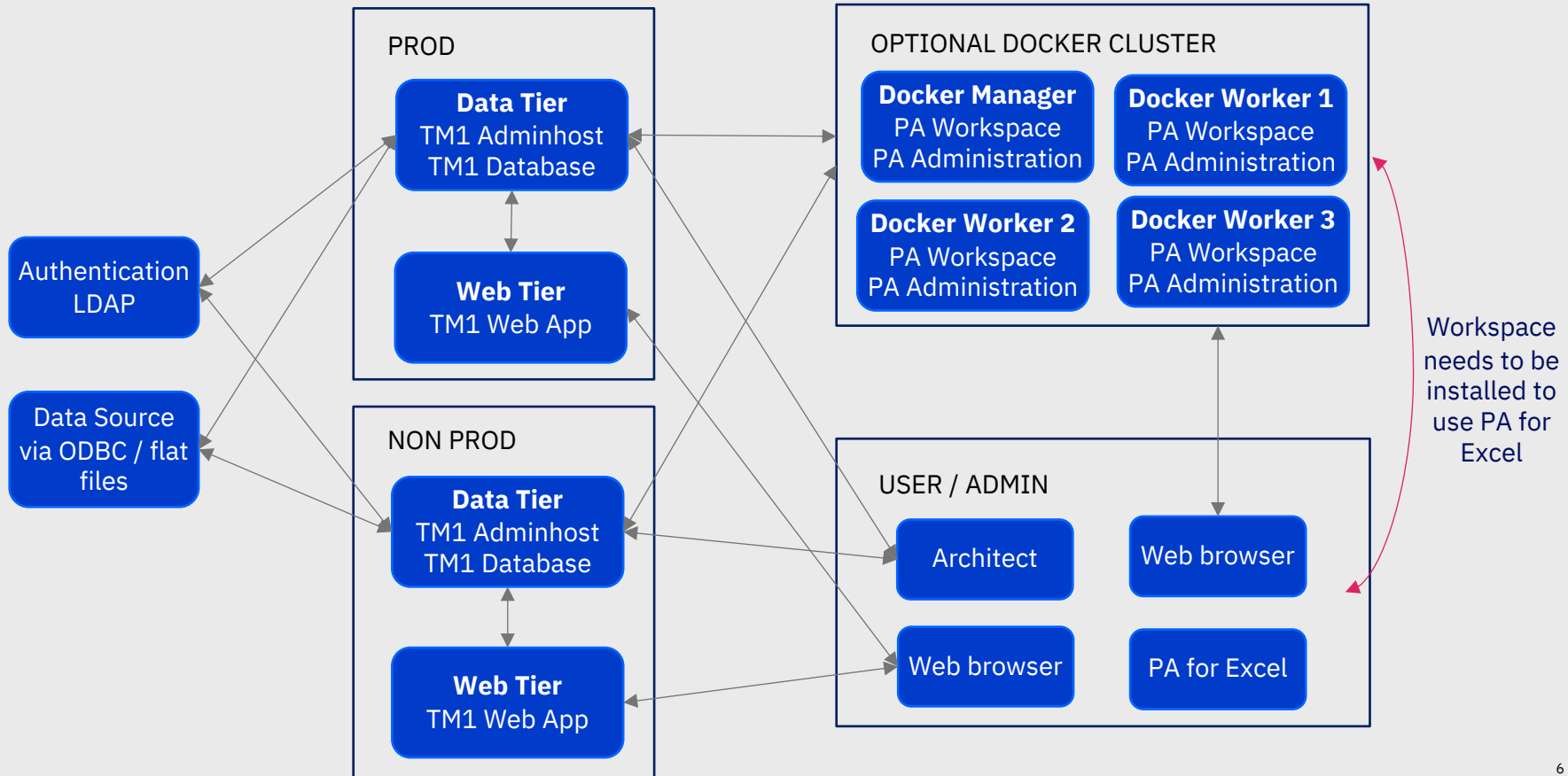
PA introduces improved methods and tools, but all existing TM1 sheets and applications will function in PA as is with no additional effort

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		x	New web based interface
Planning Analytics for Excel		x	New Excel add-in
Cognos Command Center		x	Task orchestration
Cognos Integration Server		x	Data extract automation

Planning Analytics Architecture



Planning Analytics Workspace

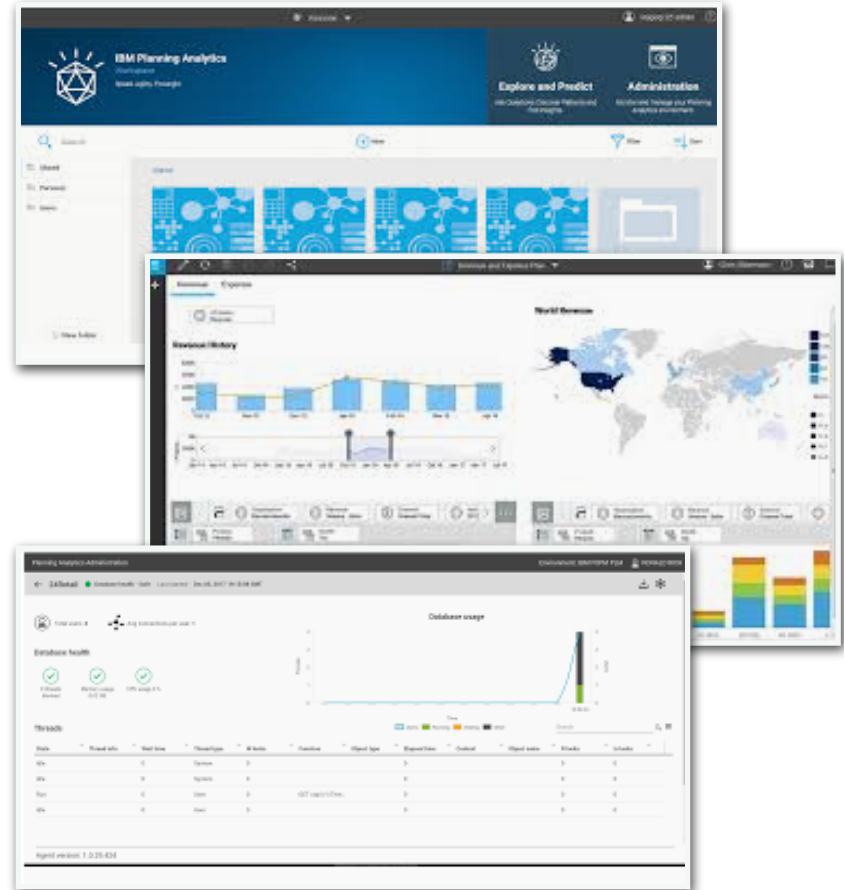
New web-based interface for Planning Analytics

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



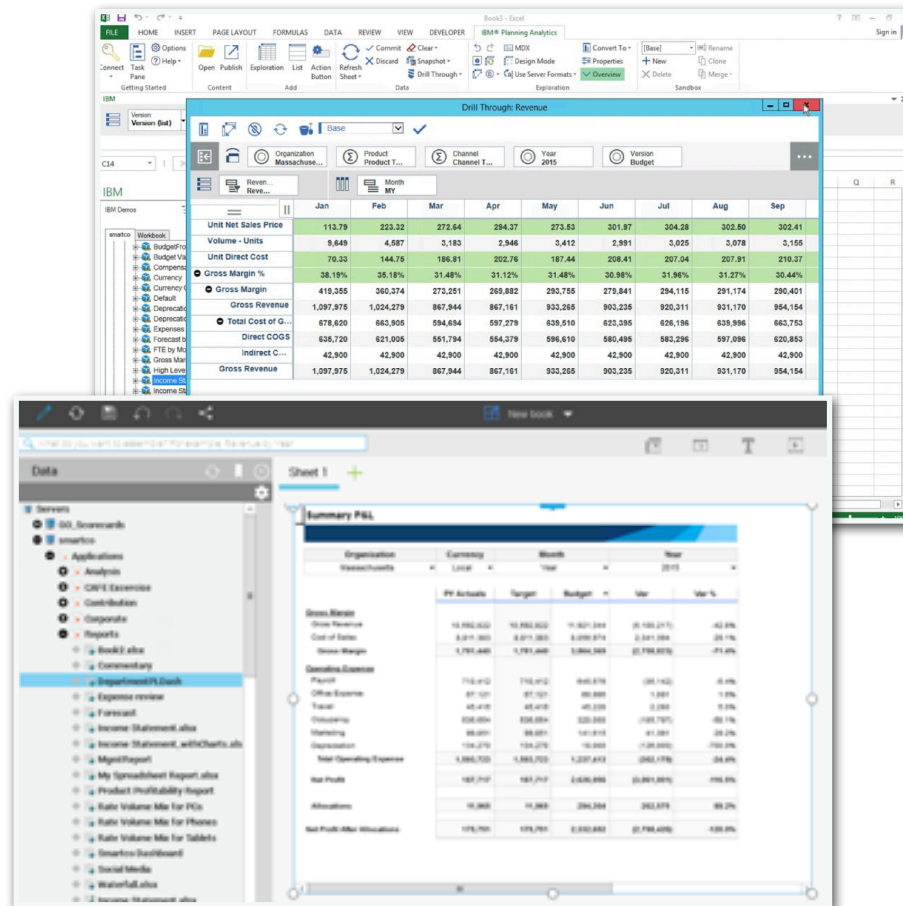
Planning Analytics for Excel

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



Compatibility and hardware requirement

Supported Environments

You can create a [Software Product Compatibility Report](#) 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
<ul style="list-style-type: none"> <input type="checkbox"/> Identify stakeholders <input type="checkbox"/> Create project plan <input type="checkbox"/> Review software environment and compatibility report <input type="checkbox"/> Identify the dependencies with other source database <input type="checkbox"/> Create testing specification <input type="checkbox"/> Set go live date <p>Determine</p> <ul style="list-style-type: none"> <input type="checkbox"/> Client software to install (TM1Web, PA Workspace, PA for Excel) <input type="checkbox"/> Install location (existing, new) <input type="checkbox"/> Determine the deployment (single computer, distributed) <input type="checkbox"/> Number of environments (prod, qa, dev) <input type="checkbox"/> Hardware and specification <input type="checkbox"/> Authentication method (TM1 native, CAM) <input type="checkbox"/> Distribution method of PA for Excel to users (manual, remote) 	<ul style="list-style-type: none"> <input type="checkbox"/> Check cores, memory and hard disk space <input type="checkbox"/> Install updates and features (OS patches, .NET, services) <input type="checkbox"/> Update the virus scan software <input type="checkbox"/> Check and update the firewall as needed <input type="checkbox"/> Check the network 	<ul style="list-style-type: none"> <input type="checkbox"/> Uninstall all TM1 software and clean all the files if reusing existing server, then reboot <input type="checkbox"/> Install PA software including TM1 server and the admin tools <input type="checkbox"/> Implement authentication (CAM if the sec mode = 5) <input type="checkbox"/> Compare all configuration (TM1s, TM1Web), validate and change as needed <input type="checkbox"/> Create ODBC connections to other database as needed 	<ul style="list-style-type: none"> <input type="checkbox"/> Disable chores <input type="checkbox"/> Stop TM1 database <input type="checkbox"/> Compress all the directories (excluding logs) and copy over <input type="checkbox"/> Uncompress the directories in the target environment <input type="checkbox"/> Modify the config (tm1s.cfg) for adminhost, port numbers, CAM URIs <input type="checkbox"/> Start TM1 database <input type="checkbox"/> Enable chores 	<p>PA Workspace</p> <ul style="list-style-type: none"> <input type="checkbox"/> Install PA Workspace <input type="checkbox"/> Configure with URIs and authentication mode <p>PA for Excel</p> <ul style="list-style-type: none"> <input type="checkbox"/> Install PA for Excel in user PC <input type="checkbox"/> Add connections to target TM1 <input type="checkbox"/> Modify the config 	<p>Validate</p> <ul style="list-style-type: none"> <input type="checkbox"/> Functional test <input type="checkbox"/> Performance test <input type="checkbox"/> User Acceptance test <p>Cut Over</p> <p>Go Live</p>



Installation & Configuration

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 single-computer

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

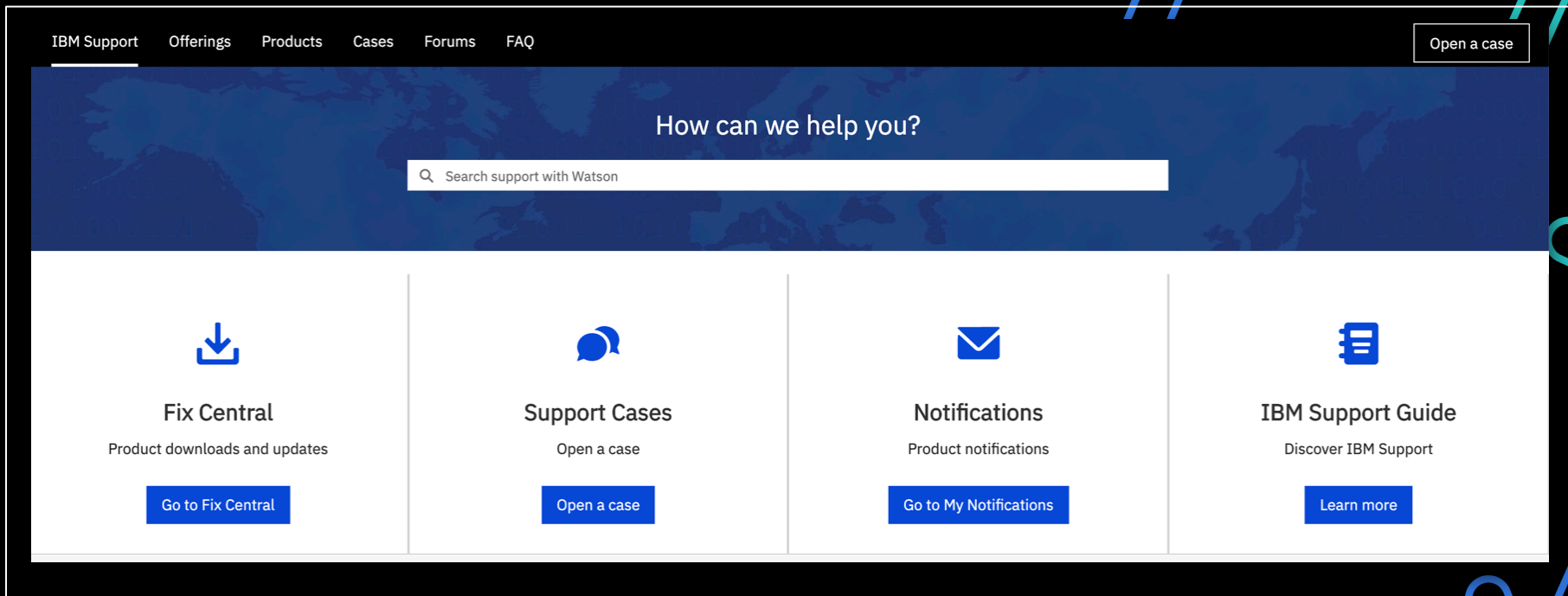
You can change the configuration of Planning Analytics Workspace Local by modifying a PAW configuration file.

Other Available Programs

Program	Duration
<p>Workspace Installation Assistance</p> <p>Remote help with Workspace installation on Docker for non-prod environment (completion of pre-requisite required), including:</p> <ul style="list-style-type: none">• Workspace installation• Connecting to PA for Excel	1 day
<p>Testing Methodology Guidance</p> <p>Provide remote guidance on testing methodology, including:</p> <ul style="list-style-type: none">• What to test• Available tools	Up to 2 hours

Additional Help

Contact IBM Support: <https://www.ibm.com/mysupport>



The screenshot shows the IBM Support website interface. At the top, there is a navigation bar with links for "IBM Support", "Offerings", "Products", "Cases", "Forums", and "FAQ". A "Open a case" button is located in the top right corner. Below the navigation bar is a large blue banner with the text "How can we help you?" and a search bar labeled "Search support with Watson". The main content area is divided into four columns, each with an icon, a title, a subtitle, and a button:

- Fix Central**: Product downloads and updates. Button: "Go to Fix Central".
- Support Cases**: Open a case. Button: "Open a case".
- Notifications**: Product notifications. Button: "Go to My Notifications".
- IBM Support Guide**: Discover IBM Support. Button: "Learn more".