

IBM Planning Analytics
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New Features Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 13.

Product Information

This document applies to IBM Planning Analytics and may also apply to subsequent releases.

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Introduction

This guide describes the features that are new in IBM® Cognos® TM1® version 10.3.0.

IBM Cognos TM1 integrates business planning, performance measurement, and operational data to enable companies to optimize business effectiveness and customer interaction regardless of geography or structure. Cognos TM1 provides immediate visibility into data, accountability within a collaborative process and a consistent view of information.

Finding information

To find documentation on the web, including all translated documentation, access IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

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Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. IBM Cognos TM1 has some components that support accessibility features. IBM Cognos TM1 Performance Modeler, IBM Cognos Insight, and Cognos TM1 Operations Console have accessibility features.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Chapter 1. New Planning Analytics Workspace

IBM Planning Analytics Workspace is a new web-based interface that is designed for a cloud environment. It provides exciting new ways to analyze data, plan, and to access content that you create.

Planning Analytics Workspace helps you focus on the things that matter to your business. Using Planning Analytics Workspace, you can identify and understand patterns and relationships in data. You can use this information to understand why things happen, and see what might happen. Planning Analytics Workspace opens up the world of advanced analytics to all business users.

You can integrate data from multiple servers in a single book in Planning Analytics Workspace. You can incorporate Websheets and views on the same sheet.

Some of the highlights of Planning Analytics Workspace are the following features.

You can:

- Quickly create views and visualizations for analysis, and share them with your colleagues, who can only see what they have the rights to see.
- Incorporate existing views in your books, side by side with new views, visualizations, and websheets.
- Create compelling designs in your books by incorporating images, text, color, web pages, and videos. You can also synchronize views, visualizations, and websheets. Dimension selectors have synchronization enabled by default.
- Search for data by typing natural language in the intent bar.
- Save views and visualizations for easy retrieval later; you can also bookmark items such as cubes or dimensions in the navigation tree.
- Perform Snap commands.
- Undo and redo actions by using buttons.

For more information, see the IBM Planning Analytics Workspace *Guide*.

Chapter 2. New features in Cognos Insight 10.3.0

There are new features in IBM Cognos Insight version 10.3.0.

For more information about these features, see the *IBM Cognos Insight User Guide*.

Support for line returns in a crosstab cell

You can now use the Alt+Enter keyboard shortcut to add a line return to a cell within a crosstab.

History chart scorecarding widget

You can now add a history chart scorecarding widget to an IBM Cognos Insight workspace. A history chart shows a column chart of actual data for a metric, with a line for target and tolerance indicators.

New picklist option for measures

When you format a measure, you can now define a list of values from which a user can select.

Data flow diagram

You can now add a data flow diagram to an IBM Cognos Insight workspace to show a visual representation of the links or processes that reference or move data between cubes.

Model report

You can create a report that contains the properties of each object contained in a model.

Mirroring in the content pane

You can now enable mirroring in the content pane to support bidirectional languages.

Chapter 3. New features in Cognos TM1 Performance Modeler version 10.3.0

These are the new features in IBM Cognos TM1 Performance Modeler version 10.3.0.

For more information about these features, see the *IBM Cognos TM1 Performance Modeler User Guide*.

Data spreading options are available from the context menu

Data spreading options are available in TM1 Performance Modeler from the context menu. Right-click the cell from which you want to initiate data spreading, and click **Spread Data**. Or in a consolidated cell, enter a value.

Create derived metrics

A derived metric is a metric based on your key performance indicators or measurements from your metric dimension. Examples of a derived metric are: Employee Satisfaction based on employee survey results, employee turnover, and cost of hiring, or Customer Satisfaction based on product survey, returns, and customer count.

You define a derived metric by creating a hierarchy in the metric dimension. The parent metric is the derived metric and it is calculated from its child metrics.

History charts are available for scorecard cubes

A history chart shows a column chart of data for a metric. By default, it compares the actual value against the target value for each time period, and indicates whether the result is within an accepted tolerance. You can change the visible range of time periods, to increase or reduce the level of detail, by sliding the focus bar.

History charts are automatically created for a scorecard cube.

Chapter 4. New features in Cognos TM1 Web version 10.3.0

These are the new features in IBM Cognos TM1 Web version 10.3.0.

For more information about these features, see the *IBM Cognos TM1 User Guide*.

Advanced conditional formatting

TM1 Web now supports color scale and icon set conditional formatting.

Select dates using a date picker

You can now select dates from a date picker. The cell must be date formatted.

Support for Microsoft ActiveX controls

Support was added for the following Microsoft Excel ActiveX controls in Websheets: check boxes, combo boxes, list boxes, radio buttons, text boxes, and labels.

Exporting improvements

When exporting Websheets to Excel and PDF, the output more closely matches the visual representation of the Worksheet than in previous versions.

New worksheet grid improves performance

A new worksheet grid implementation improves scrolling performance in TM1 Web, while eliminating the need to configure worksheet loading thresholds and scrolling buffers. The new worksheet grid is enabled by default and is recommended for all users, but is configurable using the LegacyWorksheetGrid parameter in `tmlweb_config.xml`.

Protect against Clickjacking with the X-Frame-Options response header

All the .jsp files in TM1Web now include the response header `X-Frame-Options`, which can be used to prevent unauthorized URLs from rendering TM1 Web content. The value of this response header is set with the `X-Frame-Options` parameter in `tmlweb_config.xml`. For details on this configuration parameter, see the *IBM Cognos TM1 Installation and Configuration Guide*.

Chapter 5. New features in Cognos Analysis for Microsoft Excel version 10.3

IBM Cognos Analysis for Microsoft Excel 10.3 has feature enhancements in several key areas.

Action buttons

You can use action buttons to run TurboIntegrator processes, navigate between worksheets, and recalculate worksheets.

Publishing workbooks to TM1 servers

You can now publish workbooks that contain TM1 reports to the Applications folder on a TM1 server. Publish a workbook to share it with TM1 Web users, IBM Planning Analytics Workspace users, and other IBM Cognos Analysis for Microsoft Excel users. You can publish lists, crosstabs, flex views, and formula-based reports.

Specifying the double-click action in flex views

You can now specify the double-click action when working with flex views.

Committing data in flex views

You now have more options when you commit data in a flex view. In the Commit Changes dialog box, you can choose to validate and commit only changed cells or commit all cells, without pre-validation. If any errors are found during the upload, an error report is displayed. The report shows the location of the error and a description of the error.

DBR Function Editor

You can now modify the members that are referenced in a DBR or DBRW function by using the new DBR Function Editor. You can specify members by directly entering member names, by using cell references, or by selecting members in the Subset Editor.

Copying and moving worksheets

You can move or copy worksheets that contain IBM Cognos reports, such as explorations, flex views, and formula-based reports. You can copy or move worksheets within a workbook or between workbooks.

Note: To move or copy a flex view, IBM Cognos Analysis for Microsoft Excel must be running.

Single sign-on

The **Enable single sign-on** feature is now enabled by default. Single sign-on ensures that users who are logged on to IBM Cognos Controller, IBM Cognos Disclosure Management, or IBM Cognos Analysis for Microsoft Excel are not prompted to authenticate again when they start another one of these applications. Single sign-on must be enabled on the IBM Cognos server to use this feature.

API functions

The Application Programming Interface (API) has been enhanced with new functions.

- You can use the GetSettings function to retrieve, set, and save settings in the CognosOfficeReportingSettings.xml file.

Chapter 6. New features in Cognos TM1 server version 10.3.0

These are the new features in IBM Cognos TM1 server version 10.3.0.

Rules statistic collection

A new control cube, `StatsByRule`, collects information and statistics about rules on your TM1 server. Statistic collection is enabled by the new `RULE_STATS` property in the `CubeProperties` control cube. For details, see “Monitoring rules statistics” in the *IBM Cognos TM1 Developer Guide* or *IBM Cognos TM1 Rules Guide*.

UseExcelSerialDate Tm1s.cfg parameter

When the `UseExcelSerialDate` server configuration parameter is enabled in `Tm1s.cfg`, TM1 rule functions and TurboIntegrator functions use Microsoft Excel serial dates rather than TM1 serial dates.

Changes to TM1 server configuration parameters

Version 10.3 includes changes to `Tm1s.cfg` parameters. For more details, see *Changes to TM1 server configuration parameters in IBM Cognos TM1* (<http://www.ibm.com/support/docview.wss?uid=swg27047055>).

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