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**TM1 to IBM Planning Analytics Local  
Upgrade Guidelines for IBM Customers  
V 2.85**

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**Document Version History**

<b>Date</b>	<b>Version</b>	<b>Author</b>	<b>Description</b>
3/9/2017	2.1	Andreas Kugelmeier	Adapted from TM1 to PA (Cloud) guide, V 2.1
3/13/2017	2.2	Andreas Kugelmeier	Misc. minor updates
5/31/2017	2.3	Andreas Kugelmeier	Updates to sections 4.4.3, 4.1.2.6
7/6/2018	2.7	Andreas Kugelmeier	Misc. Updates
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## **1. About this document**

This document features guidelines for the upgrade from IBM Cognos TM1 to IBM Planning Analytics Local (on Premises). The document introduces IBM Planning Analytics & differentiates IBM Planning Analytics vs. IBM Cognos TM1. This information may then be applied to the transitioning guideline materials as a means to evaluate and determine readiness and upgrade options.

## 2. Important Links

- IBM Planning Analytics Documentation:  
<https://www.ibm.com/support/knowledgecenter/SSD29G>
- IBM Planning Analytics YouTube Channel:  
<https://www.youtube.com/channel/UCGYcFhVXoA29v8kSbspLudA>
- Changes to server parameters in TM1 for IBM Planning Analytics:  
<http://www.ibm.com/support/docview.wss?uid=swg27047055>
- [IBM Planning Analytics knowledge center](#)
- [IBM Planning Analytics local software downloads from passport advantage](#)
- [IBM Planning Analytics supported environments](#)
- [IBM Planning Analytics for Excel \(PAX\) and IBM TM1 Perspectives comparison/differences](#)
- [IBM Planning Analytics and IBM Cognos Analytics Integration](#)
- [IBM PA and CA integration technotes](#)
- [IBM Planning Analytics Digital technical engagement \(DTE\): Videos, product tours and hands on labs](#)
- Additional Installation Guides & Materials:  
<https://ibm.box.com/s/d041pt68vnxmfxu6l2bekjd593ukro00>

### 3. IBM Planning Analytics Local: Introduction

#### 3.1 What Is It?

IBM Planning Analytics Local is *not* just a re-branding of TM1

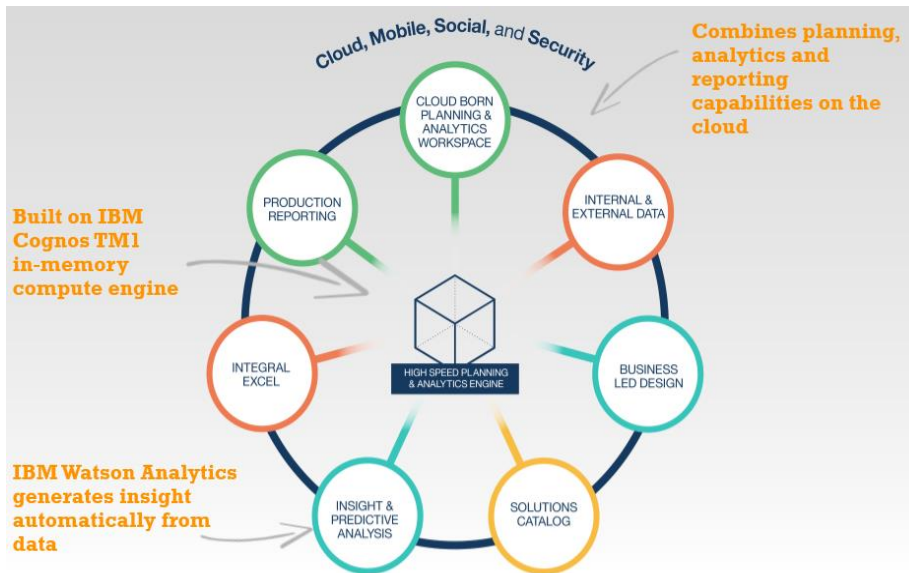
IBM Planning Analytics Local is:

- An all-in-one Solution for what we call Planning Analytics,
- consisting of integrated, latest generation Analytic Software Solutions & Platform Components,
- which include the **TM1 In-Memory OLAP Engine** (as the analytic core of IBM Planning Analytics),
- Latest Generation Self-Serve Desktop Analytics with '**Planning Analytics for Excel**' (PAX),
- Latest-Generation Web-based, Self-Serve Analytics & Collaboration with '**Planning Analytics Workspace**' (PAW)
- Hybrid-Cloud ready data integration & task automation tools<sup>1</sup>,
- featuring integration with Watson Analytics & Cognos Analytics, and
- featuring full Cloud and Hybrid-Cloud compatibility, interoperability and functional parity between IBM Planning Analytics Local (= On-Premises release) & IBM Planning Analytics (= Cloud Release)

=> IBM Planning Analytics is a fast, easy, flexible and complete

#### **Planning & Analytics Solution**

that helps drive efficiency, deliver foresight and steer business performance



<sup>1</sup> Cognos Command Center provides a solution for streamlining and orchestrating recurring maintenance and administration tasks around Master-/Meta- & Fact-Data Management for TM1, hence unlocking significant DevOps productivity gains. Cognos Integration Server - in the context of MDM, Master- & Meta-data Governance, Data-Integration & Transformation - reduces the need for custom data integrations into TM1 and between TM1 instances and from Oracle Hyperion Essbase & HFM into TM1 that otherwise require custom integration development and therefore place a burden on IT resources. Cognos Command Center and Cognos Integration Server are built on cloud-compatible data integration technology and thereby allow process automation, management and data integration in a Hybrid Cloud environment (cloud to cloud, on-premises to cloud and vice versa).

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### 3.2 IBM Cognos TM1 vs. IBM Planning Analytics Local

Functional Component	Product	TM1 On Premises	IBM Planning Analytics Local	Cloud vs On-Prem.	Use Case, Function, Features, Advantages
<b>OLAP Planning &amp; Analytics Engine</b>	TM1	X	X	On-Prem.	<b>TM1</b> is the best Performance Management solution on the market <b>for managing volatility</b> , providing <b>real-time</b> responses to complex questions. <b>Embracing Volatility:</b> High volume contribution, What-if analysis, (Meta-)Data changes & refresh
<b>Application Development</b>	Architect/ Perspectives Performance Modeler	X	X <sup>2</sup>	RDP	Solution Modeling, Design & Application Development
	Planning Analytics Workspace Local		X	On-Prem.	
	TM1 Perspectives	X	(X) <sup>3</sup>	RDP	
<b>Excel Desktop Integration</b>	PAX (formerly CAFE)	(X) <sup>4</sup>	X	Desktop	• First Generation Excel Add-In • Basic Cube Viewer  Latest Generation Excel Add-In; PAX integrates IBM planning Analytics Seamlessly with Excel on the desktop!
	TM1 Web	X	X	On-Prem.	• Excel Web-Sheet Deployment • Basic Web Cube Viewer
<b>Contribution Analysis &amp; Reporting</b>	TM1 Applications	X	X	On-Prem.	• Web Deployment of Contributor Workflow
	TM1 Mobile Contributor	X	X	On Device	• Mobile (Tablet) contribution
	Planning Analytics Workspace Local		X	On-Prem.	• Excel Web-Sheet Deployment • Latest Generation Cube Viewer • Collaboration & Workflow => One Web User Interface for all of Analytics => <b>efficiency &amp; productivity gains, higher end-user friendliness</b>
	Cognos Analytics (BI)	X <sup>5</sup>	X <sup>6</sup>	Cloud / On-Prem.	Enterprise Reporting Platform, feat. Report Studio, Cognos Workspace Advanced, Report Studio, Cognos Mobile, Bursting etc. => Best of Breed Enterprise Reporting Capabilities for Enterprise-Wide deployment of analytic content => productivity gains
<b>Cognitive Computing / Advanced Analysis</b>	Watson Analytics		X	Cloud	Latest Generation self-serve cognitive analysis & visualization, making it easy for everyone determine drivers, identify and analyze trends and anticipate the future => improved business insight
<b>Proven Practices</b>	Solution Accelerators		X	n/a	Blueprints, Accelerators, Examples, Templates
<b>IT Tools</b>	Cognos Command Center	X <sup>7</sup>	X <sup>8</sup>	On-Prem	One platform for orchestrating, streamlining and automating analytic data tasks, workflow & maintenance <sup>9</sup> , Eliminates the need for custom process & workflow orchestration <sup>10</sup> => productivity gains
	Cognos Integration Server	X <sup>11</sup>	X <sup>12</sup>	On-Prem	A data bridge supporting automated, high speed data extraction to TM1, eliminating the need for custom ETL process creation & orchestration => productivity gains

<sup>2</sup>Via Remote Desktop Protocol (RDP)

<sup>3</sup> Modelers only via Remote Desktop Protocol (RDP)

<sup>4</sup> CAFE only; PAX as of Planning Analytics Release

<sup>5</sup> TM1 Data Sources only

<sup>6</sup> addl. License may be required. Upcoming: Improved integration & performance with between Planning Analytics & Cognos Analytics via new TM1 RestAPI Interface

<sup>7</sup> With PM Advanced License

<sup>8</sup> Cognos Command Center Starter Edition is included in the Planning Analytics Enterprise edition. Unlimited use with Planning Analytics = (Unlimited PA Cloud Server Connections). Cognos Command Center Server plus Server Connection License required for (non-Planning Analytics) servers.

<sup>9</sup> integrated with TM1, RDBMS, Oracle Essbase, HFM, QlikView

<sup>10</sup> hence allows for drastic simplification of the TM1 TI processing environment

<sup>11</sup> With PM Advanced License

<sup>12</sup> Cognos Integration Server Starter Edition is included in the Planning Analytics Enterprise edition. Unlimited use with Planning Analytics = unlimited connections to and from Planning Analytics. Cognos Integration Server plus Source Connection License required for data integration that does not include Planning Analytics as either a source or target system.

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### 3.3 Interface Transformation

TM1 Web, Perspectives, Architect, Applications, Performance Modeler & Server Explorer are on an interface-transitioning path: **Planning Analytics Workspace, combined with PAX as the cloud integrated Excel Interface for the desktop, has become the main Planning Analytics (TM1) interface**, encompassing functionality such as

- Input & Contribution
- Reporting & Analysis
- Visualization
- Collaboration & Workflow
- Modeling

#### 3.3.1 Latest-Generation Web-based, Self-Serve Analytics & Collaboration with 'Planning Analytics Workspace'

'Planning Analytics Workspace' (PAW) is IBM's latest generation web-user-interface for self-serve TM1 data analysis & collaboration. PAW is available in the cloud as well as on-premises.<sup>13</sup> PAW brings capabilities to deliver interactive dashboard capabilities (including mobile), incorporating visualizations to end users and executives which can combine data from multiple TM1 Servers. Particularly due to its ease of use and comprehensive functionality in the areas of self-serve analysis & collaboration, as well as the ability to embed other TM1 UIs (TM1 Excel Web Sheets, Applications) and other web content as well as files, PAW is ideally suited as the primary UI for an Analytics Data Mart such as the Financial Data Hub. Compared to traditional Cube Viewer UIs and Reporting & Analysis interfaces, PAW features

- Significantly higher and faster end-user adoption (better analytic capabilities & ease-of-use compared to legacy UIs)
- Significantly lower Deployment & Maintenance Cost (very little to no involvement by DevOps with PAW UI work due to self-serve capabilities)
- Lower end-user training cost.<sup>14</sup>

### Planning Analytics Workspace

#### The New Face of TM1: Visual, Intuitive, Insightful, Social, Mobile



<sup>13</sup> on premises with 'IBM Planning Analytics Local 2.0'; Cloud-Release: 'IBM Planning Analytics'

<sup>14</sup> Comprehensive online video training/enabement material is available for free on the [IBM Planning Analytics YouTube channel](#).

### 3.3.2 Latest Generation Self-Serve Desktop Analytics with 'Planning Analytics for Excel' (PAX)

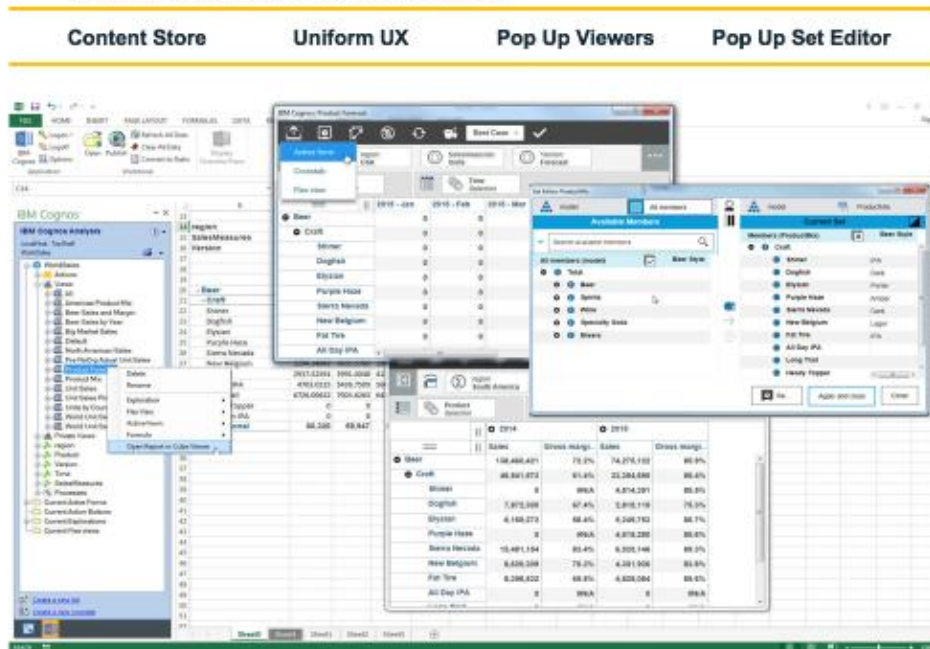
'Planning Analytics for Excel' (PAX) is IBM's new Excel interface for TM1-based data. PAX is available in the cloud as well as on-premises.<sup>15</sup> PAX Features:

- a) Superior performance over WANs and hence does not require deployment via Citrix or remote Desktop (PAX was developed for optimum performance even over WAN environments) => reduction of TM1 Citrix footprint.
- b) A significantly higher user-friendliness for Reporting, Analysis & Write-Back of TM1 Data compared to the TM1 Perspectives Excel client => reduction in help desk support hours. Comprehensive online video training/enablement material is available for free on the [IBM Planning Analytics YouTube channel](#).
- c) Compatibility with TM1 Perspectives Worksheets & Workbooks, Action Button Support, Active Forms, Web-Upload and Update of Excel Sheets to TM1 (Web)
- d) Superior functionality for self-serve, ad-hoc analysis and reporting => vastly improved user experience & productivity compared to the legacy TM1 Excel Add-In
- e) Copying data & Pasting (and writing back to) into TM1 via Excel is more functional in PAX (PAX does not require formulas to retrieve and write data from TM1 and does not require the use of DBS or DBSW formulas for linking to data that was pasted into Excel), and - last, but not least -
- f) Interoperability with Planning Analytics Workspace, in that a user can seamlessly switch an analysis between PAW (Web & Collaboration) to Desktop (Excel) and back from Desktop (Excel) to PWA (Web & Collaboration), while staying connected to the TM1 environment at all times.

## Planning Analytics for Excel

The ultimate Excel UI for FOPM:

- Ultra-fast self-serve analysis & contribution, even over WAN
- Interoperability with Workspace



<sup>15</sup> on premises with 'IBM Planning Analytics Local 2.0'; Cloud-Release: 'IBM Planning Analytics' Transitioning from IBM Cognos TM1 to IBM Planning Analytics Local: Transitioning Guide for IBM Customers, V2.85

## 4. IBM Planning Analytics Local Upgrade Guide

### 4.1 Modeling

#### 4.1.1 PAW Modeling

[TM1 Development and Modeling in Planning Analytics Workspace](#)

#### 4.1.2 Modeling and Development with TM1 Perspectives & Architect

For on Premises, same as for TM1

### 4.2 Administration & Monitoring

#### 4.2.1 Administration in PAW

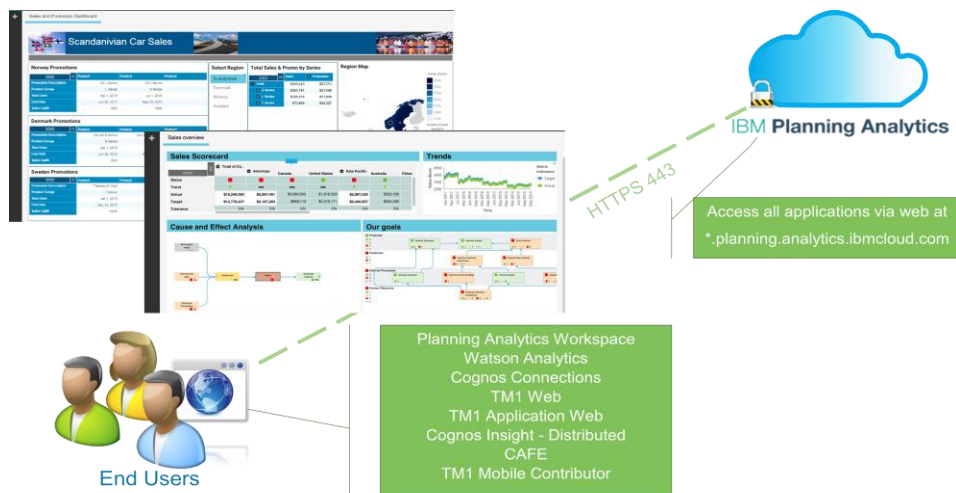
Soon available on PAW local: [TM1 Administration, Configuration and Monitoring via Planning Analytics Workspace](#). While PAW will be the recommended interface for administration, configuration and monitoring, TM1Top and TM1 Operations Console are still supported.

#### 4.2.2 (Hybrid-Cloud) Process Orchestration

[Cognos Command Center \(Introduction\)](#)

[Cognos Command Center Guides, Orientation, Tutorials](#)

### 4.3 User Interfaces with IBM Planning Analytics



#### 4.3.1 Planning Analytics for Excel (PAX)

##### 4.3.1.1 TM1-Perspectives to PAX Transitioning

On the Cloud, TM1 Perspectives may only be used by modellers (those with Remote Desktop access to the IBM Planning Analytics instance). In the context of IBM Planning Analytics deployments, a conversion & transition from TM1 Perspectives to PAX is needed in areas where end-users are currently leveraging the TM1 Perspectives Excel add-in to work with TM1 data.

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#### 4.3.1.1.1 PAX vs. Perspectives: General Differences in implementation

Some TM1 Perspectives features are implemented differently in IBM Planning Analytics for Microsoft Excel:

- Instead of slicing from the Cube Viewer into an Excel worksheet, in IBM Planning Analytics for Microsoft Excel you can right-click a view and insert it as the type of report you want. If you want to manipulate the view first, insert it as an Exploration View, manipulate the view, and then convert it to the type of report you want.
- When you refresh a Dynamic Report, the formatting is updated only if the number of rows in the data area was changed or if a value in the ID column of the format range was changed. Otherwise, rebuild the Dynamic Report (ALT+F9) to update the formatting. In TM1 Perspectives, the formatting is updated when you recalculate (F9) a Dynamic Report.
- When you rebuild a Dynamic Report, rows and columns are inserted or deleted from the existing rows or columns. In TM1 Perspectives, all rows and columns are deleted and then re-added.
- In Dynamic Reports, any change to the header row (the row with the TM1RPTROW formula) of the report requires you to recreate the report. For example, if you change the formula or add a column, you must re-create the Dynamic Report to see the results.
- In Dynamic Reports with nested rows, the member names in the nested rows are not grouped. Instead, the member names are repeated.
- Zero suppression is done based on the column tuples that are present. In TM1 Perspectives, zero suppression is done based on the product of the members of each dimension on the column (symmetric column).
- Writeback mode for formulas is enabled by default in the IBM Planning Analytics for Microsoft Excel configuration file.
- A blank dimension element in a DBRW argument is displayed as an empty result in TM1 Perspectives, but is displayed as #VALUE in IBM Planning Analytics for Microsoft Excel. This difference is because IBM Planning Analytics for Microsoft Excel returns a true error response to an invalid element, which is displayed as #VALUE. For information on how to correct a #VALUE error, see <https://support.office.com/en-us/article/how-to-correct-a-value-error-15e1b616-fbf2-4147-9c0b-0a11a20e409e>.

#### 4.3.1.1.2 First steps with PAX

[Enable Trust Access to the VBA project Object Model](#)  
[Opening an IBM TM1 Perspectives Workbook](#)

#### 4.3.1.1.3 Converting Action Buttons from Perspectives to PAX

Existing Perspectives action buttons can be converted from Perspectives to PAX via a simple [conversion procedure](#). Notes on Action Buttons in PAX:

- Action buttons in PAX are not a custom control (will improve sizing/control issues)
- PAX Action buttons are triggered via Macro (a macro attached to a text box triggers the action button to fire) => PAX worksheets with Action Buttons need to be saved in .xlsm format
- To edit an existing action button, you need to access it from the side view panel under the Current Action Button folder on the bottom of the list

#### 4.3.1.1.4 Other current limitations and differences

PAX has general Functional Parity with Perspectives, except for

- Modeling is not available. Instead, use a modeling tool, such as IBM Cognos® TM1 Performance Modeler to create and maintain models, applications, and security permissions.
- The TM1 macro functions are not available. Instead, you can use the IBM API.
- The following methods to spread data are not available: Relative Proportional Spread, Relative Percent Adjustment.

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- Dynamic Reports are supported in IBM Planning Analytics for Microsoft Excel, except for cell and password protection.
- User defined consolidations are not available. This includes the usage of DBRW worksheet functions that use subset names as a dimension element reference.
- Holds in formula reports are not visible in IBM Planning Analytics for Microsoft Excel.
- Referencing non-default hierarchies is not supported in formula or legacy reports. The default hierarchy must be the same-named hierarchy.
- In the future, it is planned for PAX to support API functionality on parity with Perspectives. A conversion from Perspectives to PAX API calls will not be offered.

Click [here](#) for PAX updates, new features & functionalities.

## 4.4 IBM Planning Analytics Local: Security Authentication Options

### 4.4.1 Native TM1 Security

IBM Planning Analytics supports native TM1 Security for TM1, PAW & PAX authentication.

### 4.4.2 CAM<sup>16</sup> Security

CAM Security is supported.

### 4.4.3 Active Directory / SSO / Integrated Login

Single-Sign on / Integrated Login for TM1 Web is officially supported as of PA Local 2.0<sup>17</sup>. See [Configuring Integrated Login for Cognos TM1 Web using Kerberos and SPNEGO](#) for details

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<sup>16</sup> Cognos Access Manager

<sup>17</sup> [Early versions of TM1 Web 10.2 did not support SSO/Integrated Login](#). SSO/Integrated Login for TM1 Web 10.2.2 FP2 or higher (10.2.2. FP\*, with \* >= 2) is supported via IBM DeveloperWorks. As of the PA Local release, SSO/Integrated Login for TM1 Web is again [supported using Kerberos and SPNEGO](#).

## 4.5 Integration of On-Premises and Cloud Infrastructure/Data

### 4.5.1 IBM Planning Analytics Local to Hybrid-Cloud Integration

Data-Integration between IBM Planning Analytics Local Instances and between Local (On-Premises) and Cloud instances and between Cloud instances is best achieved via Cognos Integration Server.

#### 4.5.1 Cognos BI On-Premises with IBM Planning Analytics Local

On-Premises Cognos BI & Cognos Analytics can access Planning Analytics Local via the TM1 C-API (same as TM1).

#### 4.5.2 Cognos Analytics On-Premises with IBM Planning Analytics Local

On-Premises Cognos Analytics instances may access Planning Analytics Local via a new connection method/type 'IBM Planning Analytics', which leverages the TM1 Rest API. Click [here](#) for more information, plus further guidance on proven practices related to Cognos Analytics with IBM Planning Analytics.

#### 4.5.3 PAX

PAX On-Premises Clients can access Planning Analytics Local and Planning Analytics Cloud directly.

#### 4.5.4 TM1 Perspectives

On-Premises TM1 Perspectives Excel Clients can access Planning Analytics Local as before (same as with TM1).

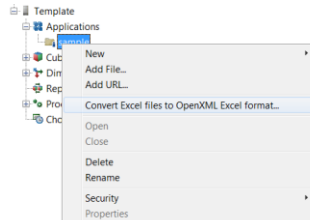
#### 4.5.5 Cognos Insight

Cognos Insight integration for Planning Analytics Local is identical to TM1. Click [here](#) for information on supported connection modes with Cognos Insight

## 4.6 Notes on upgrading TM1 environments <10.2 to IBM Planning Analytics

In principle, one may transition to IBM Planning Analytics from any older TM1 Version. Any applicable conversion could be conducted in the cloud environment. Typical conversion scenarios would be:

- TM1 (Contributor) Applications: There were changes to TM1 Application deployment and rights-saving as well as ElementSecurity for TM1 Applications in (as of) TM1 10.2<sup>18</sup>. Related conversions can be conducted in IBM Planning Analytics, i.e. an on-premises conversion to TM1 10.2 is not necessary prior to transitioning to the cloud. Any related & applicable changes will however have to be tested and validated.
- With TM1 10.2, TM1 Web technology has been changed from .NET to Java<sup>19</sup>. As a consequence, there will be slight changes in rendering behavior and other functionality between TM1 <10.2 and TM1 10.2 and higher (including Planning Analytics).
- Excel (Web) Sheets (section 6.6 in the Transitioning Guide): In TM1 environments <10.2 that are upgraded to IBM Planning Analytics and that will be leveraging IBM Planning Analytics, the TM1 Perspectives web sheets need to be converted to OpenXML (xlsx) to be compatible with TM1 10.2 Web technology. TM1 10.2 as well as IBM Planning Analytics include a built-in utility to convert web-sheets that will convert all xls sheets within an application:



While this method it will take <1 hour to convert all pre-TM1 10.2 xls sheets to OpenXML and hence make the web sheets compatible with TM1 10.2 & Planning Analytics Web, each web sheet should be validated individually after the conversion. Conversions can be conducted in IBM Planning Analytics, i.e. an on-premises conversion to TM1 10.2 is not necessary prior to transitioning to the cloud.

<sup>18</sup> See <http://www.ibm.com/support/docview.wss?uid=swg21659476> & <http://www.ibm.com/support/docview.wss?uid=swg21659499> for details.

<sup>19</sup> See <http://www.ibm.com/support/docview.wss?uid=swg27039576> & <http://www.ibm.com/support/docview.wss?uid=swg27042071> for details