Migrating from IBM TM1 to IBM Planning Analytics

The evolution of IBM TM1 technology –
for the agile organization

Highlights

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Access and analyze data through a dynamic, self-service proprietary Workspace

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Engage users through a convenient Microsoft Excel interface

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Analyze cubes and dimensions with alternate hierarchies

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Create vivid reports with automated visualizationss

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Deploy on cloud or on premises – with no lengthy migration process

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Install and go, using your current model and mode of operation

IBM Planning Analytics – the evolution of IBM TM1

IBM® Planning Analytics is the next generation planning, budgeting, forecasting and analysis solution built on the powerful, in-memory calculation engine of IBM TM1®. Deployable on cloud or on-premises, this fast, flexible and complete solution starts from the foundation of IBM TM1 and adds game-changing new capabilities.

With an intuitive interface, praised for its ease of use by customers and analysts alike, IBM Planning Analytics goes beyond automating manual tasks and improving process efficiency. It enables you to build sophisticated multi-dimensional models and perform in-depth analysis on virtually any combination of data hierarchies and dimensions. It offers cognitive capabilities that help you create predictive insights directly from internal and external data sources. And it helps you create and share compelling reports using a variety of automated visualizations.

Migrating to IBM Planning Analytics local (on-premises) is simple
Although the name of the product has changed, the migration process is the same as moving to a new version of IBM TM1. No lengthy migration process is required, and customers with current S&S entitlements can migrate at no additional cost. You simply install and go, using your current model and mode of operation.

Additionally, you have the opportunity to adopt the innovations of IBM Planning Analytics – such as IBM Planning Analytics Workspace – according to your organization's own schedule and at a pace that suits your users. You are not required to adopt the new components to take advantage of IBM Planning Analytics. Users can test and explore the new capabilities before deploying broadly or pushing to a production environment.

We are committed to making your migration to IBM Planning Analytics simple. If you would like help or guidance, IBM has created a series of free programs to ensure a seamless migration.

**IBM Planning Analytics Workspace –
the interface that revolutionizes IBM TM1**
IBM Planning Analytics Workspace is the customizable user interface that is the new face of IBM TM1. It enables users to combine data from any cube in any IBM TM1 database into a single view, using a viewer, charts, websheets or cell widgets. No time-consuming data conversion is necessary.

Planning Analytics Workspace is a single interface available for all user roles – from "power users" who build and analyze models to managers on the front lines of the business who contribute quarterly budget data. Workspace supports analysis, reporting and write-back with an interactive viewer. This makes it easy to navigate multi-dimensional cubes and convert "data exploration" into charts for use in presentations and to share results with others.

In addition to Workspace, the IBM TM1 web user experience (UX) has been redesigned for IBM Planning Analytics so that websheets load, scroll and refresh faster than ever before. The tight coordination of IBM Planning Analytics with IBM Cognos® Analytics (formerly IBM Cognos Business Intelligence) is another plus.

Share analysis broadly
Sharing is a major feature of IBM Planning Analytics Workspace. Analysts can easily explore their data and find insights, then create a book and share it with others in the organization. Sharing is not limited to those with Admin or Modeler rights in the solution.

Superior scale for growing business
Scalability has always been a key strength of IBM TM1 and remains so in IBM Planning Analytics. Planning models can support nearly unlimited data sets and very large implementation footprints, without an impact on performance – meaning you can deliver insights in real time. (In fact, one customer selected IBM Planning Analytics in part for its ability to handle a "supercube" of data containing 51 quintillion cells.)

This enterprise scalability enables analysts to examine business problems in all their complexity. And it allows large organizations to collect vital data from hundreds or even thousands of participants on the front lines of the business without being slowed down.

No need to recreate apps or models
You do not need to rebuild your existing applications or data models when you migrate to IBM Planning Analytics. If you've built applications for data contribution using websheets in IBM TM1 10.2.2, using action buttons to run processes and navigate between websheets, you can enjoy the same functionality in Workspace, using books. Current IBM TM1 models and cubes will also continue to work in IBM Planning Analytics.

Visualizations to bring insights to life
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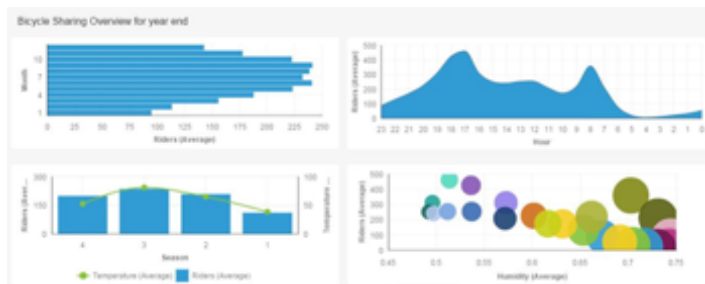

Figure 1: Develop and share insights
with colorful visualizations.

Hierarchies for more flexible analysis
The Hierarchies capability in IBM Planning Analytics enables you to expand your analysis beyond the traditional limits of data cubes. With business-user benefits as well as behind-the-scenes technical advantages, Hierarchies enable you to perform more granular analysis using "attributes" to describe various characteristics of customers, products, projects, sales programs and more. Attribute data can be leveraged seamlessly in the form of "virtual dimensions" using data that existed at the time the cube was created or introduced later on.

The benefits of virtual dimensions include:
– Dynamic data hierarchies for attributes that change over time
– Reduced model maintenance
– Faster calculations, thanks to smaller cube size
– Ad hoc hierarchies that can be created and introduced into Workspace, Microsoft® Excel, web or mobile for quick, convenient analysis

The Hierarchies capability also enables you to see the intersections of several hierarchies within the same dimension, so you can drill down to discover data points and relationships never before possible. In addition, Hierarchies can be used for dimension reorganization and versioning, and implemented through an intuitive process that needs little in the way of setup.

IBM Planning Analytics for Microsoft Excel®
IBM Planning Analytics for Microsoft Excel is the successor to IBM Cognos Analysis for Microsoft Excel (CAFE). This add-on lets users explore and analyze data sourced from multidimensional planning models within the familiar Microsoft Excel interface. You retain full Excel functionality and formatting, including graphing and built-in functions, while enjoying the capabilities of a modern analytics solution.

IBM Planning Analytics for Microsoft Excel provides Excel access to the IBM TM1 database. It integrates with Workspace, and both environments share a common UX, cube viewer and set editor. Reports created in IBM Planning Analytics for Excel can be published for websheet consumption in Workspace.

IBM Planning Analytics for Microsoft Excel has four modes of interaction:
– Exploration for slice, dice and pivot analysis
– Quick reports for fast worksheet design
– Dynamic reports for row interactivity (zero suppression, expand, collapse)
– Custom reports for highly formatted forms and reports

Upon migrating to IBM Planning Analytics, you can start exploring the capabilities of IBM Planning Analytics for Microsoft Excel at your own pace. There is no requirement to shift to the new interface. In addition, IBM TM1 Perspectives is still available after the migration, so users can continue to use the same tools as before and adopt the new capabilities whenever they are ready.
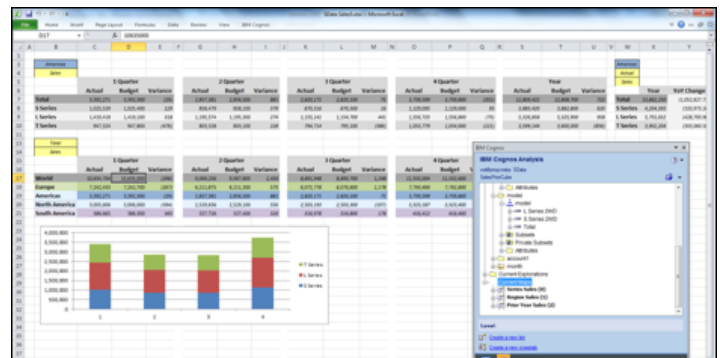

Figure 2: Access IBM Planning Analytics through the familiar Microsoft Excel interface.

IBM is here to help

Migrating from IBM TM1 to IBM Planning Analytics is not a complicated procedure, but we've created programs to ensure that your experience is truly seamless. These programs are free and we encourage you to learn more by contacting us at: tm1upgrade@ca.ibm.com. Take the first step by scheduling a free 30-minute consultation and/or product demonstration with your IBM representative.

We also invite you to join our monthly Ask Me Anything about IBM Planning Analytics webinar sessions.

A migration designed around your needs

In designing IBM Planning Analytics, we listened to comments and feedback from IBM TM1 customers in different industries and lines of business around the world. We put everything we learned into IBM Planning Analytics – if you've realized value from IBM TM1, then we believe you'll get even more value from IBM Planning Analytics.

Visit the IBM Planning Analytics website to learn more about why many of your peers have already made the change.

Upgrade planning
Provide remote guidance and best practice on upgrade planning, including technical considerations on:
– Installation
– Conformance review
– What's new in IBM Planning Analytics

Workspace installation assistance
Provide remote help with Workspace installation on Docker for non-production environment, including:
– Workspace installation
– Connecting to IBM Planning Analytics for Microsoft Excel

Testing methodology guidance
Provide remote guidance on testing methodology, including:
– What to test
– Available tools

Solution Brief

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