



# IBM Cognos Forum

Ignite knowledge, ideas, connections

## Translating Cognos Enterprise Planning models into TM1

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# Agenda

- **Disclaimer**
- **Friendly advice**
- **TM1 and Planning – similarities and differences**
- **TM1 and Planning – gains and losses**
- **Project Considerations**
- **Business Considerations**
- **Design Considerations**
- **Deployment Options**
- **Summary**

## **Disclaimer**

- > Please do not consider this a “sales” presentation**
- > Please do not consider this to be “IBM Cognos” saying TM1 is better than Planning**
- > Please do not interpret this presentation as meaning that TM1 is the “future” product**
- > Please do not interpret this presentation as meaning that Planning has no future**

# This presentation may not be for you...

> If you:

- Like Planning
- Have happy users
- Have a tool does what you need it to
- Are overall satisfied

> Then why change?

- It will cost you money
- It will take time
- It may not be successful
- Why take the risk?

# **This presentation still may not be for you...**

- > If your Planning model:**
  - Seems slow
  - Is struggling with model size
  - Has stability issues
- > Then seek a second opinion**
- > Consider:**
  - Health check (they're usually free)
  - Archiving old data
  - Version upgrade
  - Model Redesign

## TM1 the tool – in “Planning speak”

- > Analyst = Architect / Perspectives
- > Manager = n/a
- > CAC  $\approx$  Application folder in Architect
- > Contributor = TM1 web
- > In addition, TM1 has Executive Viewer, which is another web interface with graphing / charting capabilities

## TM1 objects – in “Planning speak”

> The easy ones

- D-list = dimension
- D-cube = cube
- e.List = n/a
- IM Table = n/a

> The less easy ones

- Calculation = rule
- D-link = rule

> The more challenging ones

- Calculation option  $\approx$  feeder
- Assumption cube = dimension attribute or alias

# TM1 Architecture – in “Planning speak”

## > Planning

- Admin server (Analyst / CAC)
- Web server
- Database server
- Job server(s)
- Cognos 8 – Content store / security

## > TM1

- TM1 server
- Web server (maybe)



## **What do you gain in TM1?**

- > Speed**
- > Size**
- > Attributes / Alias'**
- > Live reporting**
- > Cross dimensional calculations**

## What do you lose in TM1?

- > An “easy” modelling interface
- > BiFs
- > Workflow (with traffic lights, owner and editor details, and email integration)
- > Formatted D-List items (drop down lists)
- > Quick commands
- > Attaching files
- > Offline Forecasting
- > Re-usable calculations
- > Library functions in Analyst
- > Manager

## Where does that leave you?

- > Pain v Feature tradeoff
- > Move to TM1? Consider:
  - Exposure to another project
  - It's not a straight like for like, even with the similarities
  - Translate models
  - Remodel?

# **The IBM Cognos project methodology**

- > IBM Cognos Lab Services follows a methodology**
  - **Called CSIM (Cognos Solutions Implementation Methodology)**
  - **Analysis and Design are extremely important**
    - **It is possible to revisit Build, Deploy and Operate**
    - **Analysis and Design cannot be revisited as easily**
    - **Can be the most expensive phases of the project**
    - **Most TM1 projects can be rolled out within 3 months**

## **Translate v Redesign**

- > When embarking on a project, the first thing that should be considered is:**
  - Translation v Redesign
- > Why Translate?**
  - Business rules / logic still valid
  - Heavy investment in business rules from user community
  - Limited budget
- > Why Redesign?**
  - Business rules / logic still valid
  - More flexible user community
  - Bigger budget

## Translating - Model Design considerations

- > If your Planning model is well designed and built, rebuilding will be much easier
- > Review the Manager model diagram to remind yourself of the relationships between all the elements of the application
- > Analyse the dimensionality of the Planning model
  - Within the cubes - where it is the same or similar, use one cube
- > Build the dimensions the same way TM1 as they are built in Planning
  - Static lists can be Copied and Pasted from Planning to TM1
  - ODBC can be used for “Dynamically” updated D-Lists
  - Dimensions can be built off each other (although there is less need to in TM1)
  - Aggregations can be manually built in the dimension, or built dynamically in TI

## Translating - Model Design considerations (cont)

- > Strip out calcs from the D-Lists, and copy into the Rules file – they can almost work right away
- > Assumption cubes / lookup cubes
  - Store static data (facts) as an Attribute against a dimension
  - Updated assumptions will need to be stored in a cube
- > Movement of data between cubes
  - As has been discussed, best to leave data in one place
  - Use “DB” rules to reference the data – will replace D-Links
- > Data
  - Publish user entered data from Planning (writable cells only – view layout)
  - Import data directly against cells using TI
  - Ideally use same source, and replicate process in Planning from Source systems

## Translating - Model Design considerations (cont)

### > Overall

- Model should contain fewer but bigger cubes
- Possibly more cells – but not an issue if there are more cells

### > Locking down the model

- It is good practice to use subsets on dimensions
- It is also good practice to use views on cubes
- Security can be defined against either a subset or a view, as well as an entire cube
- Security in TM1 works across all TM1 platforms
- Security can also be integrated with C8 security



## **How to deploy it to users**

- > TM1**
- > TM1 Web**
- > Executive Viewer**
- > The choice depends on**
  - How many users there are**
  - Where they are**
  - What they want to do with the models**

## Summary

- If you are a current Planning user, with some “issues” don’t necessarily consider TM1 to be the “default” choice
  - Health check
  - Model Re-design
  - Version upgrade
- Planning has many features that TM1 does not have (yet)
- There are a number of model design areas to be considered
- It’s not a simple “like for like” upgrade
- Model Translation v Redesign has serious implications for the Analysis and Design phase of the project
- There are experts around that can help you do this!

## Closing Thought

- > **Software is important**
- > **But...**
- > **A badly designed and built model may not produce an acceptable solution, no matter how good the software**
- > **If, in considering your choice of FPM software, you also review your model design and build, then it has been a worthwhile process**

## Want more information?

- > Feel free to contact me – or I can put you in touch with people in my team.
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Questions  
&

Answers



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