

Activity A04_Revenue_Budgeting

In this activity we add a budget into the model. We also create a canvas layout which can later be used as the client for an application. We will also explore the synchronize functionality

Outline steps and screenshots.

1. Open A03_Revenue_Target_Setting.cdd and **Save As** A04_Revenue_Budgeting.cdd
2. Add a new tab rename it **Budget**

Add the List price view and add a budget item.

3. Expand the data pane and drag the List Prices cube onto the workspace.
4. Re-orientate so Months is on the columns, List Price measures on the rows and change to crosstab only.
5. Add a member to the List price measures dimension named **Budget Current Year**

We want to seed this with the target prices

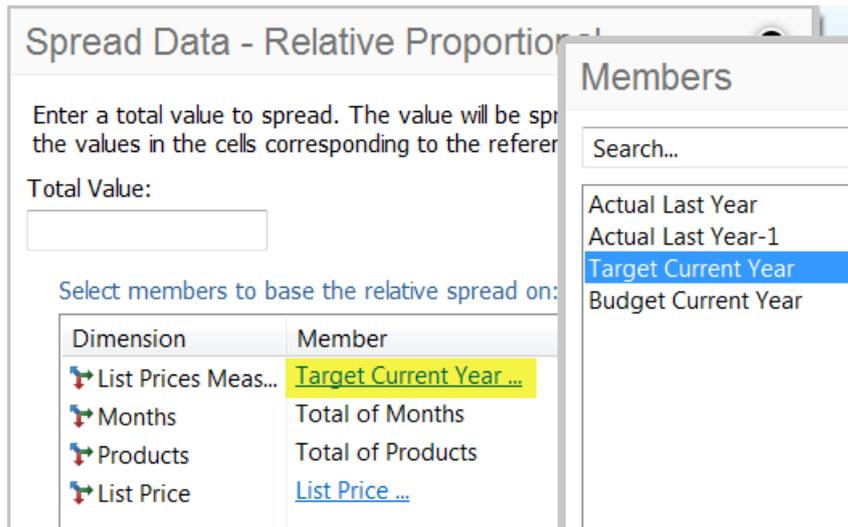
6. Right click on the Total of Months/Budget Current Year intersect ensuring that Total of Products is selected in the context area. Select Spread Data and Relative Proportional.

The screenshot shows the IBM Cognos TM1 workspace with a crosstab. The Rows dimension is 'List Prices Measures' with 'List Prices Measures' selected. The Columns dimension is 'Months' with 'Months' selected. The Context dimension is 'Total of Products' with 'Products' selected. The 'List Price' dimension is also visible. The crosstab data is as follows:

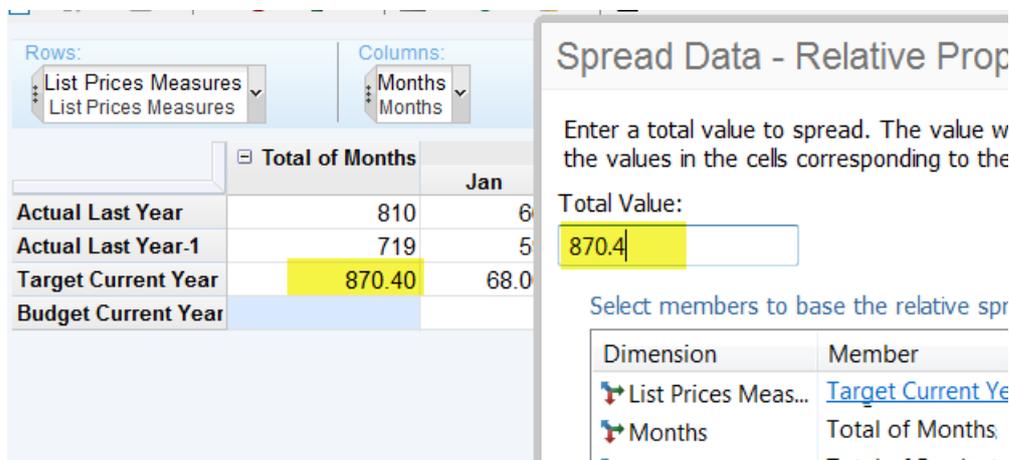
	Total of Months	Jan	Feb	Mar	Apr	May	Jun
Actual Last Year	810	66	67	67	67	67	
Actual Last Year-1	719	59	60	60	60	60	
Target Current Year	870.40	68.00	68.00	68.00	68.00	74.80	74
Budget Current Year							

A context menu is open over the 'Budget Current Year' cell, showing options: Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Drill Down, Clear Values, Format Measure Budget Current Year, Rollup (Budget Current Year), Create Cube Calculation..., Open Cube Calculation, Delete Cube Calculation, Show Value as, and Spread Data (Relative Proportional...).

- From the dialog box select Target Current Year as the List Price Measure and ensure both Months and Products are the totals.



- Enter the value of 870.4 as per the total in the Target Current Year and click OK.



- Check the results are replicated across all products.

Target Current Year	Total of Products	870.40	68.00	68.00	68.00	68.00	68.00	74.80	74.80	74.80	74.80	74.80	74.80	74.80	74.80
	Artful Artifacts	128.00	10.00	10.00	10.00	10.00	10.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00
	Whacky Widgets	153.60	12.00	12.00	12.00	12.00	12.00	13.20	13.20	13.20	13.20	13.20	13.20	13.20	13.20
	Thoughtful Things	192.00	15.00	15.00	15.00	15.00	15.00	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50
	Potty Possessions	192.00	15.00	15.00	15.00	15.00	15.00	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50
	Ominous Objects	204.80	16.00	16.00	16.00	16.00	16.00	17.60	17.60	17.60	17.60	17.60	17.60	17.60	17.60
Budget Current Year	Total of Products	870.40	68.00	68.00	68.00	68.00	68.00	74.80	74.80	74.80	74.80	74.80	74.80	74.80	74.80
	Artful Artifacts	128.00	10.00	10.00	10.00	10.00	10.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00
	Whacky Widgets	153.60	12.00	12.00	12.00	12.00	12.00	13.20	13.20	13.20	13.20	13.20	13.20	13.20	13.20
	Thoughtful Things	192.00	15.00	15.00	15.00	15.00	15.00	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50
	Potty Possessions	192.00	15.00	15.00	15.00	15.00	15.00	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50
	Ominous Objects	204.80	16.00	16.00	16.00	16.00	16.00	17.60	17.60	17.60	17.60	17.60	17.60	17.60	17.60

10. Re-orientate the cube again to focus on the Budget item and select **Don't Show Totals** for the Months dimension. Resize the widget and place in the top left of the workspace.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Total of Products	88.00	88.00	88.00	88.00	74.80	74.80	74.80	74.80	74.80	74.80	74.80	74.80
Artful Artifacts	10.00	10.00	10.00	10.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00
Whacky Widgets	12.00	12.00	12.00	12.00	13.20	13.20	13.20	13.20	13.20	13.20	13.20	13.20
Thoughtful Things	15.00	15.00	15.00	15.00	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50
Potty Possessions	15.00	15.00	15.00	15.00	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50
Ominous Objects	16.00	16.00	16.00	16.00	17.60	17.60	17.60	17.60	17.60	17.60	17.60	17.60

Add the Net Revenue view and add a Budget item.

11. Drag the Net revenue cube from the data pane onto the workspace.
12. Change to crosstab only and re-orientate as per screen shot below.

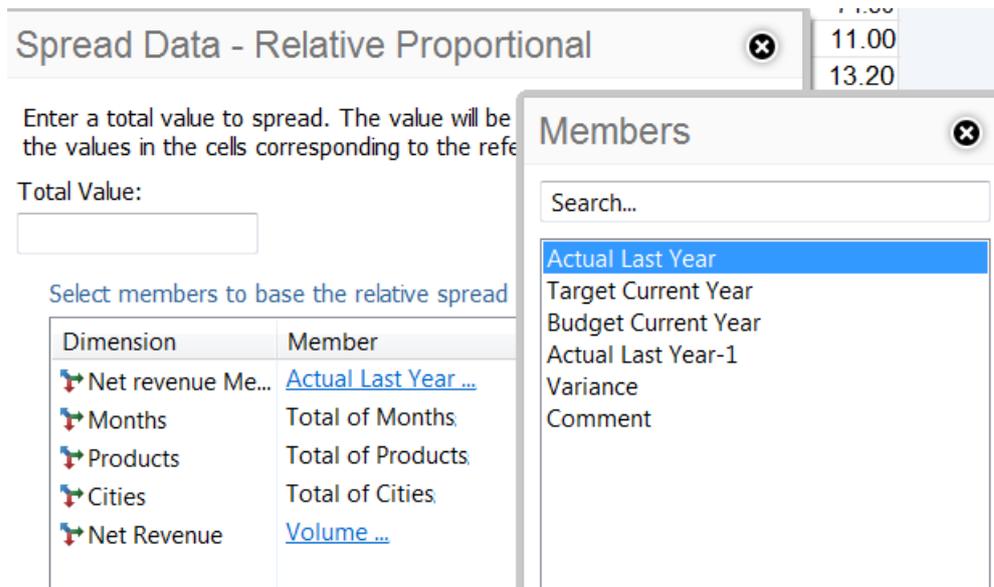
	Jan	Feb	Mar	Apr	May	Jun	Jul
Total of Months							
Actual Last Year	100253	6292	6375	6764	7180	7629	8113
Target Current Year	120304	7550	7650	8117	8616	9155	10247
Actual Last Year-1	83700	6805	6596	6593	6619	6672	6759
Variance	16553	-513	-221	171	561	957	1354
Comment							

13. Add a new member just below the Target Current Year (hint – right click the Target Current Year and select Insert). Name the new item **Budget Current Year**.

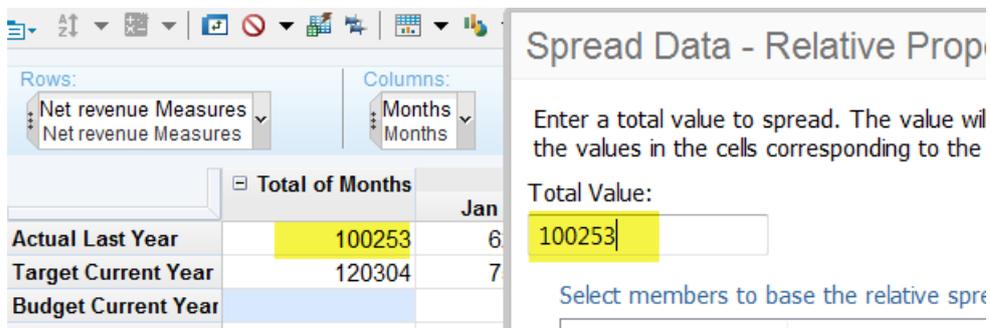
Now we will populate the new item with the same data as the **Actual Last Year** using the spread data technique (as we did for List Prices)

14. Select the Total of Months/Budget Current Year intersect ensuring that Total of Products is selected in the context area. Select Spread Data and Relative Proportional.

- From the dialog box select Actual Last Year as the Net Revenue Measures and ensure Months, Products and Cities are the totals and that the Volume is selected for the Net Revenue dimension.



- Enter the value of 100253 (the total from the Volume for Actual last Year) and select OK.



- Occasionally committing the data will ensure that you can undo future steps back to this point if you should need to.



We need to change the scope of the Gross Revenue calculation and update the Import Link for this calculation.

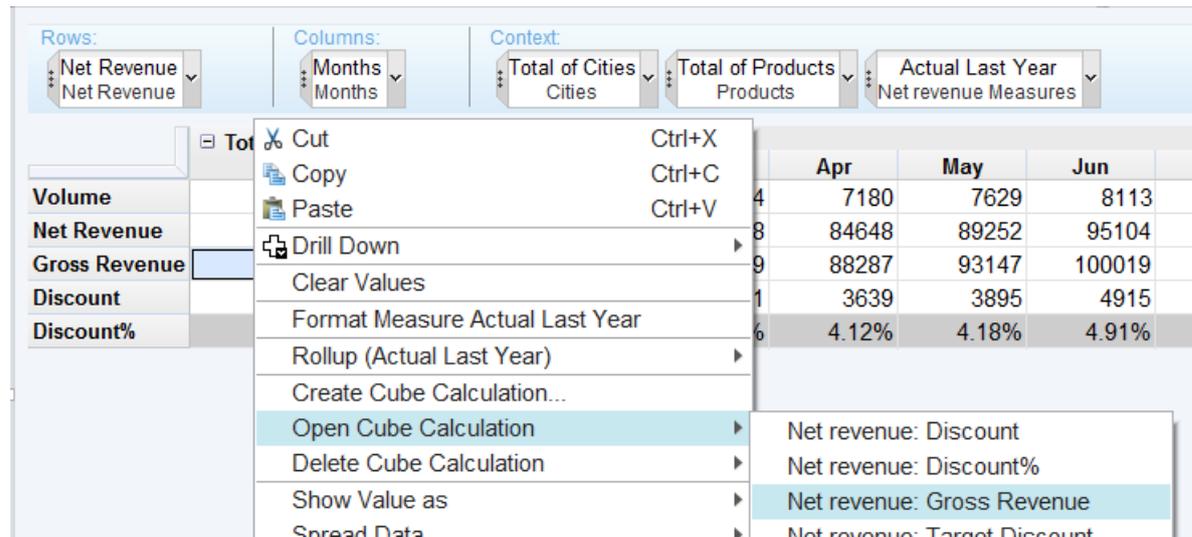
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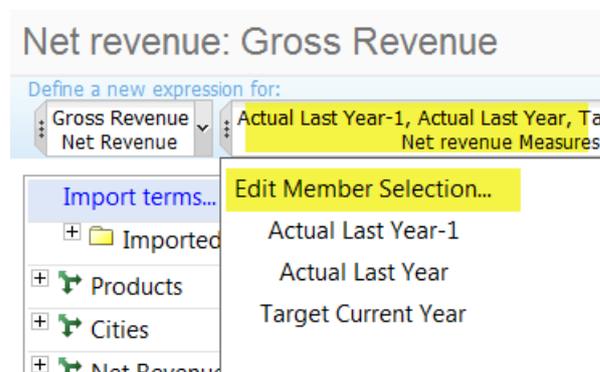
18. Re-orientate the cube so that the Net Revenue dimension is on the rows.

Amend the calculations as necessary

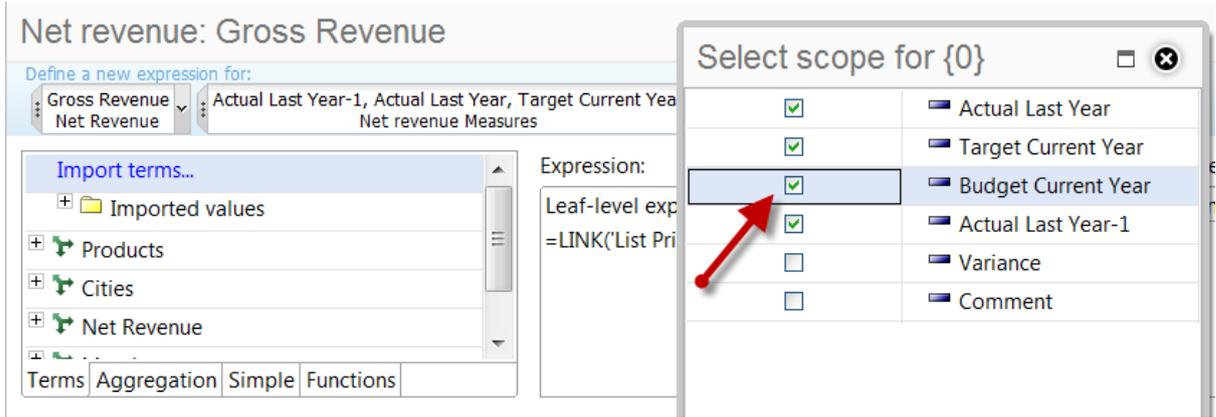
19. Right click in the grid, select Open Cube Calculation - Net revenue: Gross Revenue



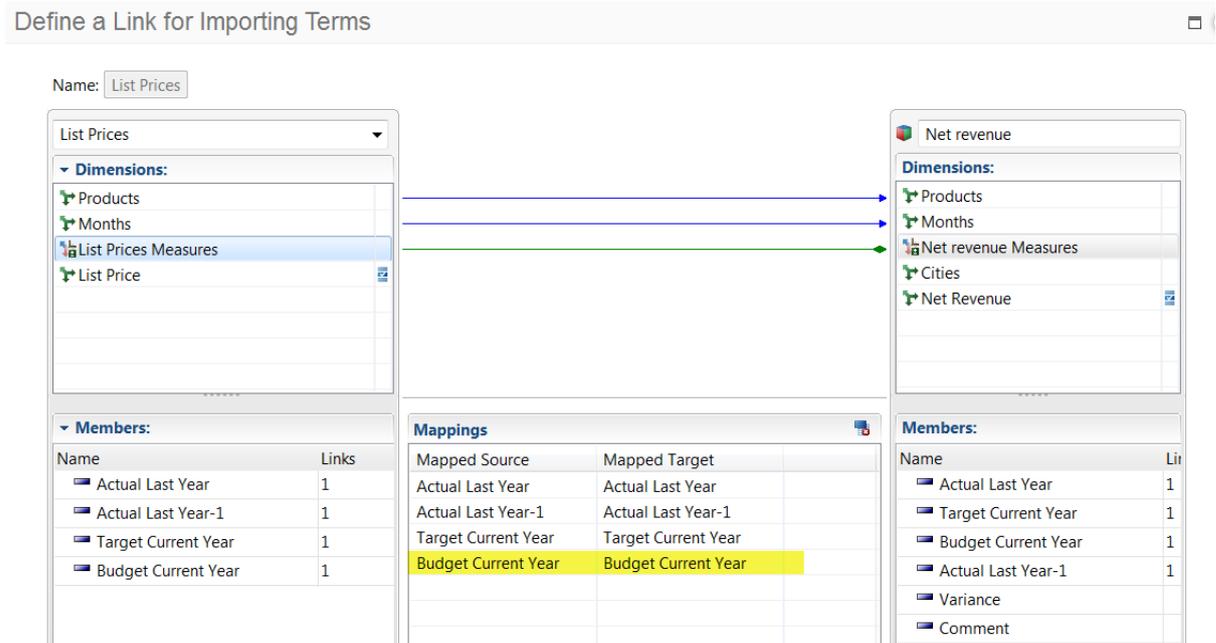
20. Click on the Net Revenue Measures dimension and select **Edit Member Selection**.



21. Ensure that the checkbox next to Budget Current Year is selected and select OK.



22. Click on the + next to the **Imported values** to expand, double click the **List Prices** import term to amend the link.
23. Add a mapping for **Budget Current Year** as per screen shot below and click OK.



24. Click OK to save the amended cube calculation and check that the results are as expected.

Rows:	Columns:	Context:															
Products	Months	Total of Cities	Budget Current Year	Gross Revenue													
Products	Months	Cities	Net Revenue Measures	Net Revenue													
	Total of Months				Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Total of Products					1302303	79483	80772	85122	89760	104190	110021	114670	118230	122351	126966	132341	138398
Artful Artifacts					630655	29930	29950	32980	36250	43857	48246	53075	58355	64185	70653	77704	85470
Whacky Widgets					31550	3252	3036	2916	2784	2917	2759	2614	2495	2402	2218	2125	2033
Thoughtful Things					273885	17670	19155	20595	22095	25922	27522	27522	25922	24305	22655	21071	19454
Potty Possessions					186048	14535	14535	14535	14535	15989	15989	15989	15989	15989	15989	15989	15989
Ominous Objects					180165	14096	14096	14096	14096	15506	15506	15470	15470	15470	15453	15453	15453

To populate the Discount we will simply copy and paste the data from the Target Current Year. We do not want to use a calculation as we want to keep this item as writable - the idea being that once this model is deployed as an application the budget managers would input Volumes and Discount % for this year's budgets.

- The easiest way to do this is to re-orientate and nest the view as below (hiding the items not required to help focus and all totals to ensure that only the leaf level values are copied) and copy/paste the data from the Target Current Year to Budget Current Year.

Rows:			Columns:											
Net revenue Measures		Cities	Products	Months	Context									
Net revenue Measures		Cities	Products	Months	Discount% Net Revenue									
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Target Current Year	Swansea	Ominous Objects	2.13%	2.13%	2.13%	2.13%	2.13%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Budget Current Year	London	Artful Artifacts	4.19%	5.00%	5.00%	4.96%	4.98%	5.00%	4.99%	5.00%	4.95%	4.97%	4.98%	4.98%
		Whacky Widgets	3.74%	4.61%	3.22%	3.57%	3.96%	3.95%	3.70%	2.94%	5.00%	4.03%	2.59%	4.17%
		Thoughtful Things	5.00%	4.96%	4.84%	5.00%	4.91%	5.00%	5.00%	4.92%	2.05%	1.82%	1.98%	2.14%
		Potty Possessions	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%
		Ominous Objects	0.00%	0.00%	0.00%	0.00%	0.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
	Liverpool	Artful Artifacts	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
		Whacky Widgets	3.85%	1.39%	5.00%	3.03%	5.00%	3.33%	5.00%	3.70%	5.00%	2.08%	5.00%	5.00%
		Thoughtful Things	3.57%	4.05%	4.46%	4.82%	5.00%	5.00%	5.00%	5.00%	1.71%	1.50%	1.08%	0.59%
		Potty Possessions	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%	2.12%
		Ominous Objects	2.13%	2.13%	2.13%	2.13%	2.13%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
	Bristol	Artful Artifacts	3.84%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
		Whacky Widgets	5.00%	0.00%	5.00%	5.00%	5.00%	5.00%	1.19%	5.00%	5.00%	1.39%	5.00%	5.00%
		Thoughtful Things	5.00%	5.00%	5.00%	4.58%	4.68%	4.79%	4.79%	4.73%	1.55%	2.47%	2.37%	2.25%
		Potty Possessions	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%	1.96%
		Ominous Objects	2.08%	2.08%	2.08%	2.08%	2.08%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
	Newcastle	Artful Artifacts	4.65%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
		Whacky Widgets	3.16%	1.23%	2.56%	3.67%	4.86%	1.52%	1.98%	2.08%	2.19%	1.85%	1.47%	0.52%
		Thoughtful Things	4.96%	4.85%	4.81%	4.78%	4.75%	5.00%	5.00%	4.72%	1.77%	1.80%	1.88%	1.93%
		Potty Possessions	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%	0.14%
		Ominous Objects	0.13%	0.13%	0.13%	0.13%	0.13%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
	Birmingham	Artful Artifacts	3.66%	3.90%	3.95%	3.99%	3.93%	3.92%	4.08%	3.97%	4.03%	4.02%	4.00%	4.04%
		Whacky Widgets	5.00%	2.67%	3.82%	4.71%	5.00%	5.00%	5.00%	5.00%	5.00%	4.90%	4.17%	2.78%
		Thoughtful Things	5.00%	5.00%	4.84%	5.00%	5.00%	4.94%	4.94%	5.00%	2.33%	1.85%	2.04%	2.32%
		Potty Possessions	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%	0.81%
		Ominous Objects	0.76%	0.76%	0.76%	0.76%	0.76%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
	Manchester	Artful Artifacts	2.31%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
		Whacky Widgets	5.00%	5.00%	5.00%	4.80%	3.76%	5.00%	3.87%	5.00%	5.00%	3.82%	4.71%	5.00%

Note – In Performance Modeler you could do this using a link manifest as a TI process but that is not available in Cognos Insight at this release.

- Re-orientate back so that Net revenue is on the rows and check the data on a leaf level item. We see that the Discount and Net Revenue calculations are not yet working for the Budget Current Year.

Rows:		Columns:											
Net Revenue Measures		Months	Context										
Net Revenue		Months	Budget Current Year Net Revenue Measures										
			Total of Cities Cities										
			Total of Products Products										
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Volume		6292	6375	6764	7180	7629	8113	8539	8913	9338	9811	10349	10950
Net Revenue													
Gross Revenue		79483	80772	85122	89760	104190	110021	114670	118230	122351	126966	132341	138398
Discount													
Discount%		198.41%	180.03%	197.66%	200.99%	201.64%	226.99%	218.95%	226.40%	199.59%	182.90%	199.22%	194.87%

27. We need to update the cube calculation for Target Discount so that it covers the Budget Current Year item. Open the Cube Calculation **Net revenue: Target Discount**

The screenshot shows a cube calculation grid with the following data:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Volume	575	569	626	688	757	833	916	1008
Net Revenue								
Gross Revenue	5750	5690	6260	6880	8327	9163	10076	11088
Discount								
Discount%					98%	5.00%	4.99%	5.00%

A context menu is open over the 'Discount%' row, with the 'Open Cube Calculation' option selected. The sub-menu shows the following options:

- Net revenue: Discount
- Net revenue: Discount%
- Net revenue: Gross Revenue
- Net revenue: Target Discount** (highlighted)

28. Select the Net Revenue measures and Edit Member Selection. Ensure that the Budget Current Year checkbox is selected and select OK and OK to save the calculation.

The screenshot shows the 'Net revenue: Target Discount' dialog box with the 'Target Current Year' checkbox selected. The 'Select scope for {0}' dialog box is also open, showing the following options:

Scope	Selected
Actual Last Year	<input type="checkbox"/>
Target Current Year	<input checked="" type="checkbox"/>
Budget Current Year	<input checked="" type="checkbox"/>
Actual Last Year-1	<input type="checkbox"/>
Variance	<input type="checkbox"/>
Comment	<input type="checkbox"/>

IBM Cognos TM1 Enablement Program – Activity A04

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Volume	6292	6375	6764	7180	7629	8113	8539	8913	9338	9811	10349	10950
Net Revenue												
Gross Revenue	79483	80772	85122	89760	104190	110021	114670	118230	122351	126966	132341	138398
Discount	2545	2597	2800	3012	3538	4277	4371	4509	4033	4228	4513	4772
Discount%	198.41%	180.03%	197.66%	200.99%	201.64%	226.99%	218.95%	226.40%	199.59%	182.90%	199.22%	194.87%

29. Repeat for the Target Net Revenue calculation.

Net revenue: Target Net Revenue

Define a new expression for:

Net Revenue (Net Revenue Measures)

Import terms...: Imported values, Products, Cities, Net Revenue

Expression: =netrevenue:[Gross Revenue]

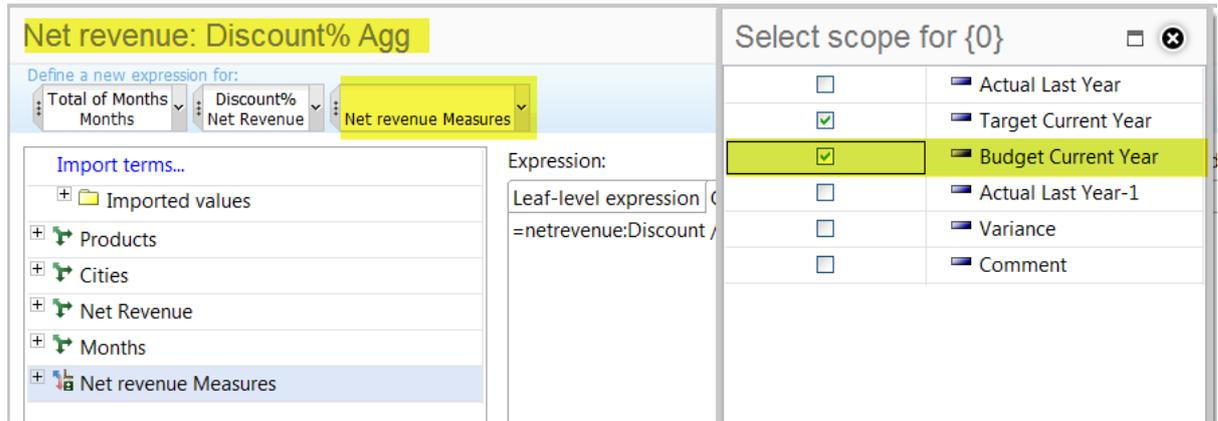
Select scope for {0}: Actual Last Year, Target Current Year, Budget Current Year, Actual Last Year-1, Variance, Comment

OK Cancel

30. The result will look as below:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Volume	575	569	626	688	757	833	916	1008	1108	1219	1341	1475
Net Revenue	5509	5406	5947	6539	7912	8705	9573	10534	11585	12743	14016	15417
Gross Revenue	5750	5690	6260	6880	8327	9163	10076	11088	12188	13409	14751	16225
Discount	241	285	313	341	415	458	503	554	603	666	735	808
Discount%	4.19%	5.00%	5.00%	4.96%	4.98%	5.00%	4.99%	5.00%	4.95%	4.97%	4.98%	4.98%

31. Repeat for the Discount% Agg calculation

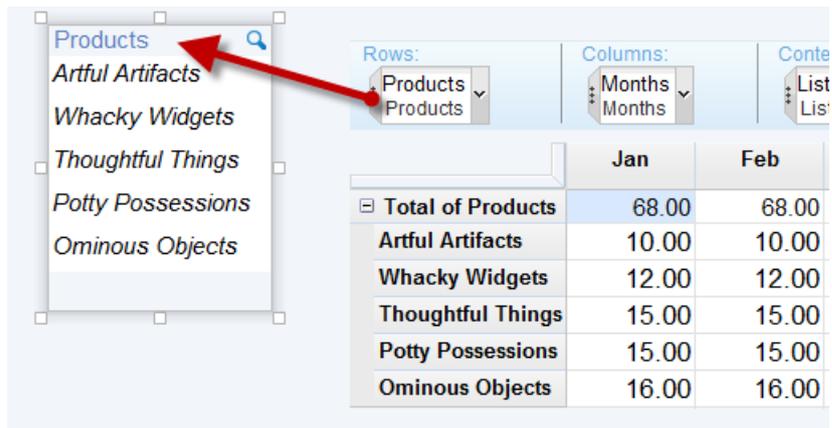


32. The result will look as below:

Rows:	Columns:	Context:	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cities	Months	Budget Current Year												
Cities	Months	Discount% Net Revenue												
		Artful Artifacts												
		Products												
Total of Cities			3.97%	3.96%	4.02%	3.97%	3.95%	3.96%	3.98%	3.95%	3.94%	3.99%	3.99%	3.97%
London			4.19%	5.00%	5.00%	4.96%	4.98%	5.00%	4.99%	5.00%	4.95%	4.97%	4.98%	4.98%
Liverpool			5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Bristol			3.84%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Newcastle			4.65%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Birmingham			3.66%	3.90%	3.95%	3.99%	3.93%	3.92%	4.08%	3.97%	4.03%	4.02%	4.00%	4.04%
Manchester			2.31%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Edinburgh			5.00%	3.12%	2.84%	3.07%	2.87%	2.98%	2.91%	2.95%	2.98%	2.94%	2.97%	3.01%
Glasgow			5.00%	2.05%	1.91%	2.03%	2.10%	2.02%	1.95%	1.93%	2.02%	2.00%	2.03%	2.03%
Inverness			5.00%	0.54%	1.22%	1.11%	0.00%	0.19%	1.33%	1.21%	0.42%	1.38%	1.48%	0.63%
Dundee			5.00%	0.00%	1.09%	0.07%	0.07%	0.18%	0.25%	0.00%	-0.12%	0.44%	0.25%	0.12%
Cardiff			1.82%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Swansea			5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%

Start to set up the synchronization between the widgets and add explore points for easier navigation.

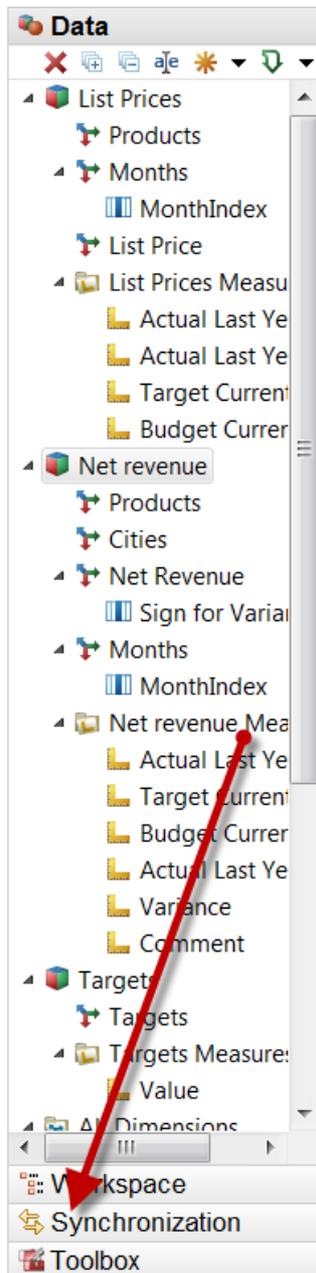
33. Tear the Products dimension from the List Price cube to create an explore point.(drag the Products dimension from the view onto the Workspace)



The screenshot displays the IBM Cognos TM1 interface. On the left, a list of products is shown: Products, Artful Artifacts, Whacky Widgets, Thoughtful Things, Potty Possessions, and Ominous Objects. On the right, a data table is displayed with columns for Jan and Feb. The table includes a 'Total of Products' row and individual rows for each product. A red arrow points from the 'Products' header in the list to the 'Products' dropdown in the table's column headers.

	Jan	Feb
Total of Products	68.00	68.00
Artful Artifacts	10.00	10.00
Whacky Widgets	12.00	12.00
Thoughtful Things	15.00	15.00
Potty Possessions	15.00	15.00
Ominous Objects	16.00	16.00

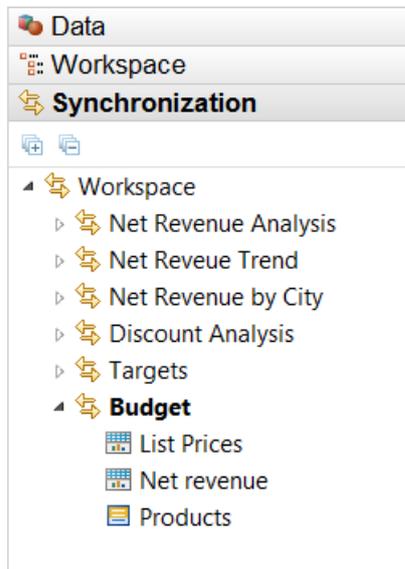
34. Open the Synchronize pane (at the bottom of the Data Pane)



We see that a group has been automatically created by default for each of the tabs. Under each tab are the widgets on the tab. For the Budget tab we see 3 widgets – 2 views (List Price and Net revenue) and one explore point (Products)

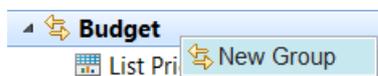
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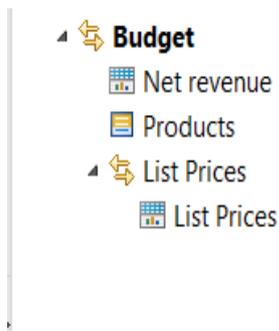


As the widgets we want to synchronize are within the Budget tab we will create a group to hold the synchronized widgets.

35. Right click on Budget and select New Group



36. Rename the group List Prices and drag the List Prices widget reference into this new group.



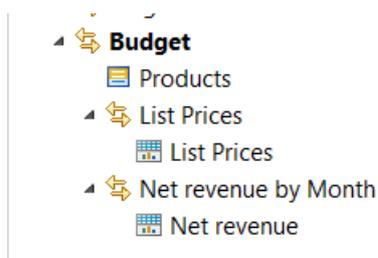
37. Orientate the List Price Cube as below to make the data clearer. Use **Don't Show Totals** on Months.

	Jan	Feb	Mar	Apr	May	Jun	Jul
Total of Products	68.00	68.00	68.00	68.00	74.80	74.80	74.80
Artful Artifacts	10.00	10.00	10.00	10.00	11.00	11.00	11.00
Whacky Widgets	12.00	12.00	12.00	12.00	13.20	13.20	13.20
Thoughtful Things	15.00	15.00	15.00	15.00	16.50	16.50	16.50
Potty Possessions	15.00	15.00	15.00	15.00	16.50	16.50	16.50
Ominous Objects	16.00	16.00	16.00	16.00	17.60	17.60	17.60

38. Now test this by selecting Artful Artifacts from the explore point and see that the List Price view will also change so that only this product is showing.

	Jan	Feb	Mar	Apr	May	Jun	Jul
Artful Artifacts	10.00	10.00	10.00	10.00	11.00	11.00	11.00

39. We now add a second group to the Synchronization section for the Budget tab. Right click on Budget and select New Group Rename the group **Net Revenue by Month** and drag the net revenue widget reference into this new group



40. Re-orientate and select the Net Revenue view as shown below:

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Volume	100253	6292	6375	6764	7180	7629	8113	8539	8913	9338	9811
Net Revenue	1257107	76938	78175	82322	86748	100652	105744	110299	113721	118318	122738
Gross Revenue	1302303	79483	80772	85122	89760	104190	110021	114670	118230	122351	126966
Discount	45196	2545	2597	2800	3012	3538	4277	4371	4509	4033	4228
Discount%	3.47%	3.20%	3.22%	3.29%	3.36%	3.40%	3.89%	3.81%	3.81%	3.30%	3.33%

41. Test the workspace by selecting Thoughtful Things on the explore point and see that both views change to reflect this choice.

The top screenshot shows a product list on the left with 'Thoughtful Things' selected. The pivot table below it has 'Thoughtful Things' in the context, showing values for Jan through July.

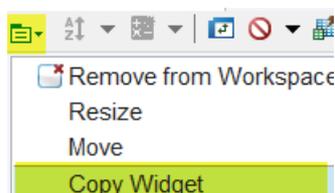
	Jan	Feb	Mar	Apr	May	Jun	Jul
Thoughtful Things	15.00	15.00	15.00	15.00	16.50	16.50	16.50

The bottom screenshot shows the pivot table updated to show 'Total of Months' in the context, displaying a summary of net revenue and volume for the first seven months.

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul
Volume	17081	1178	1277	1373	1473	1571	1668	1668
Net Revenue	262987	16811	18213	19603	21007	24646	26179	26179
Gross Revenue	273885	17670	19155	20595	22095	25922	27522	27522
Discount	10898	859	942	992	1088	1275	1343	1343
Discount%	3.98%	4.86%	4.92%	4.82%	4.92%	4.92%	4.88%	4.88%

Add the final widgets onto the workspace.

42. Click the widget menu for the Net Revenue widget and select **Copy Widget**.

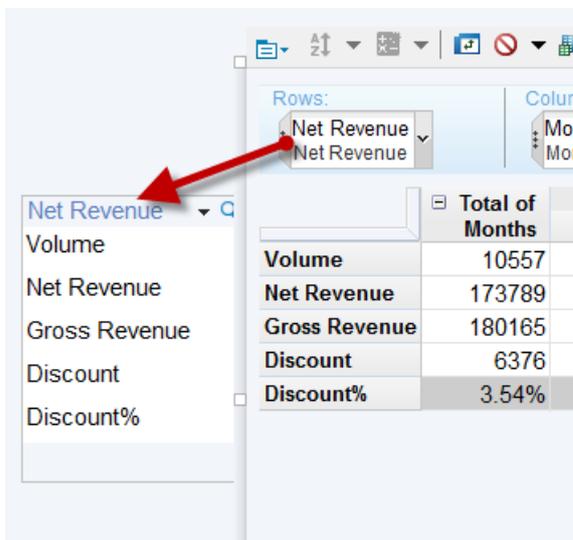


43. Right click on an open piece of the workspace and right click and select **Paste.Widget**.

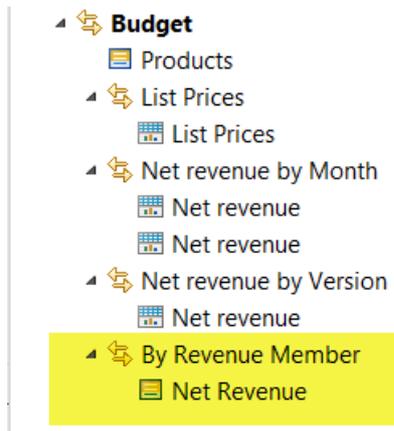
44. Go back to the Synchronization pane and add a new group under Budget. Rename it **Net Revenue by Version**.
45. Drag the bottom Net revenue widget from the Net revenue by Month group into this group.
46. On the workspace re-orientate the view and hide the Actual Last Year-1, Variance and Comment items. Check that the explore point is affecting all 3 views by switching to Ominous Objects. The view will appear as below:

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Actual Last Year	Target Current Year	Budget Current Year
Volume	10557	881	881	881	881	881	881	879	879	878	878	878	878	10557	12668	10557
Net Revenue	173789	13858	13858	13858	13858	15243	14730	14791	14784	14713	14699	14699	14699	168559	216198	173789
Gross Revenue	180165	14096	14096	14096	14096	15506	15506	15470	15470	15470	15453	15453	15453	168912	216198	180165
Discount	6376	238	238	238	238	262	775	679	687	757	754	754	754	8353	0	6376
Discount%	3.54%	1.69%	1.69%	1.69%	1.69%	1.69%	5.00%	4.39%	4.44%	4.89%	4.88%	4.88%	4.88%	4.95%	0.00%	3.54%

47. Go back to the Synchronization pane and add a new group under Budget. Rename it **By Revenue Member**
48. Again click the widget menu for the first Net Revenue widget and select **Copy Widget**. Right click on an open piece of the workspace and right click and select **Paste.Widget**.
49. Tear out the Net Revenue dimension to be an explore point.

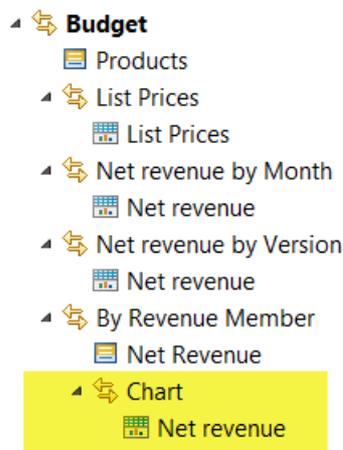


50. Go back to the Synchronization pane and drag the Net Revenue explore point widget into the By Revenue Member group.(Note the different icon used for explore points as compared to views)



51. Add a new group under By Revenue Member. Rename it **Chart**

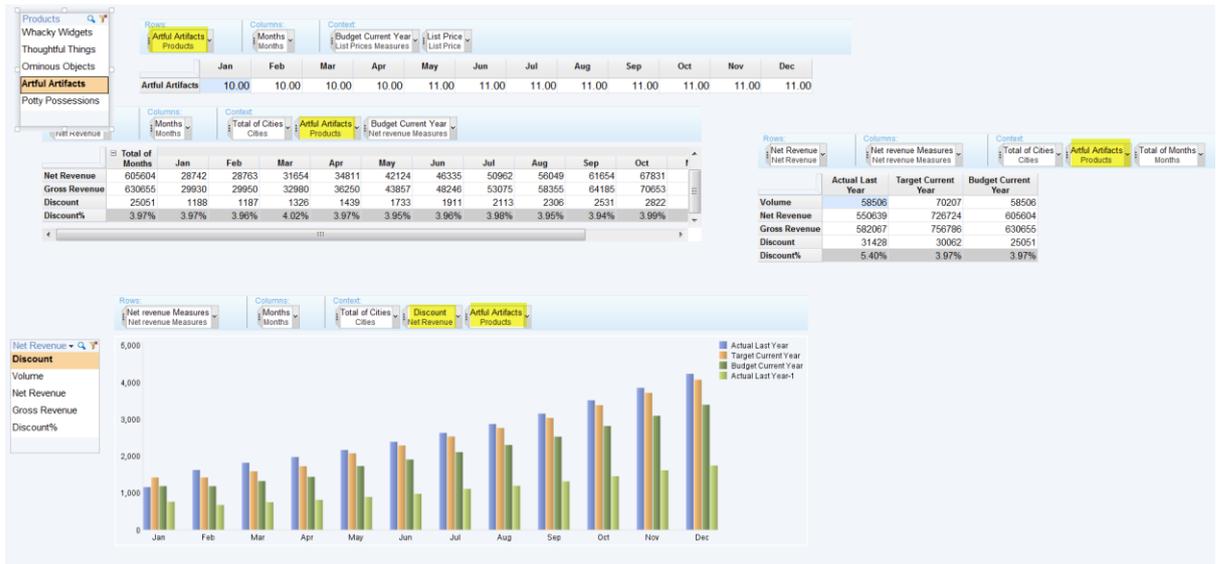
52. Drag the latest Net revenue widget from the Net revenue by Month group into the Chart group



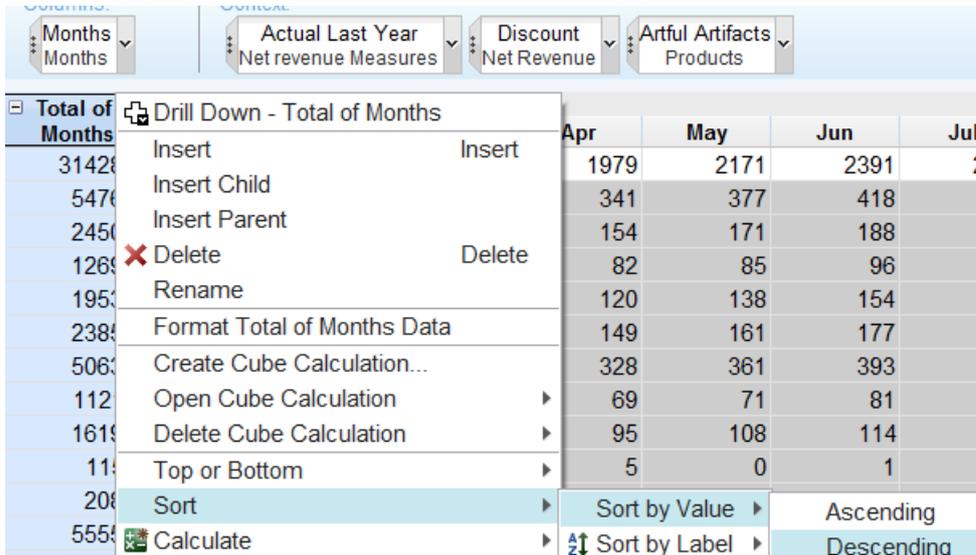
53. On the last Net Revenue widget that you copied, items, put months on the columns, Net Revenue Measures on the rows, hide Variance and Comment and change it to a chart.

54. Check that both the products and the Net Revenue explore points will change this chart.

IBM Cognos TM1 Enablement Program – Activity A04



55. Return to the Synchronization pane and add a new group under **Chart** and rename it **Detail**.
56. Paste a widget onto the workspace (the system will use the last one that you copied) Drag this latest Net revenue widget into the Detail group.
57. Orientate Cities on the rows and Months on the columns.
58. Click the Total of Months column and right click to select Sort - Sort by Value – Descending

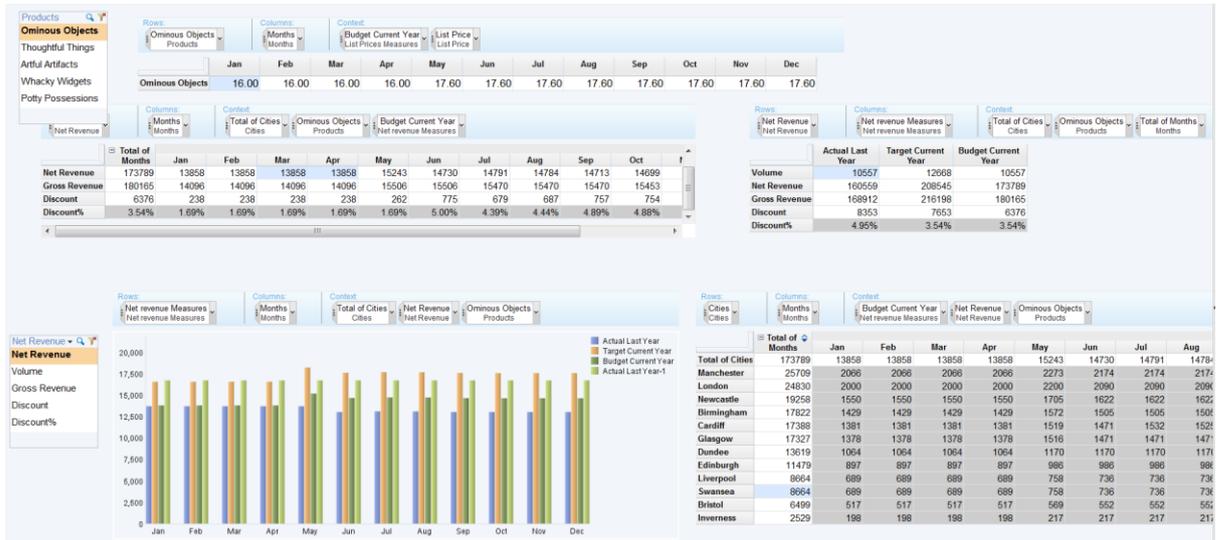


59. Close the Data pane and arrange the widgets as per screen shot.

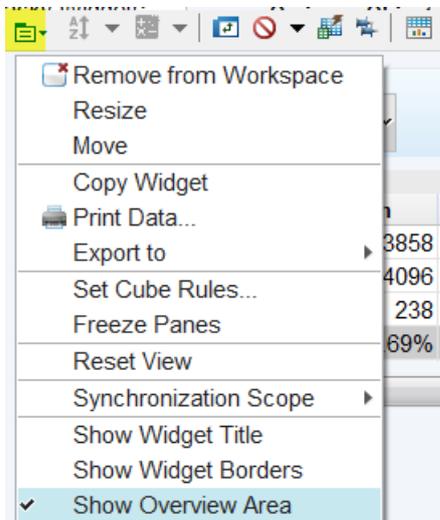
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IBM Cognos TM1 Enablement Program – Activity A04



- 60. Check the synchronization is working as designed. Changing the product should affect ALL widgets whilst changing Net Revenue should only change the bottom 2 widgets.
- 61. To make the workspace look clearer hide the overview area on each of the crosstab/chart widgets.



- 62. Save the cdd file

Examine the different ways to enter budget data

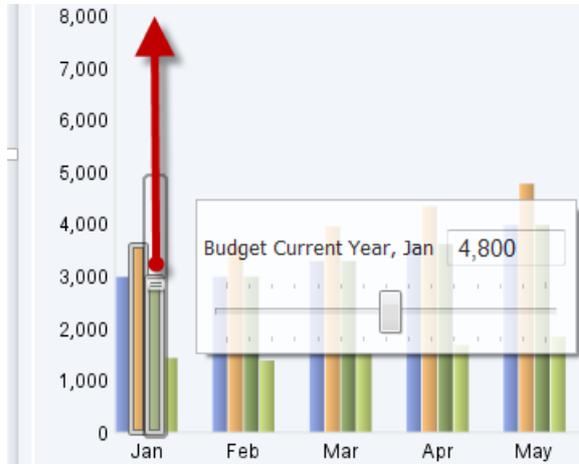
In this section we will use the bar on the chart to set the Budget Current Year Volume for Artful Artifacts to 8K and then use the crosstab to put in a compound 2% growth per month.

- 63. Click on Artful Artifacts on the Products Explore point

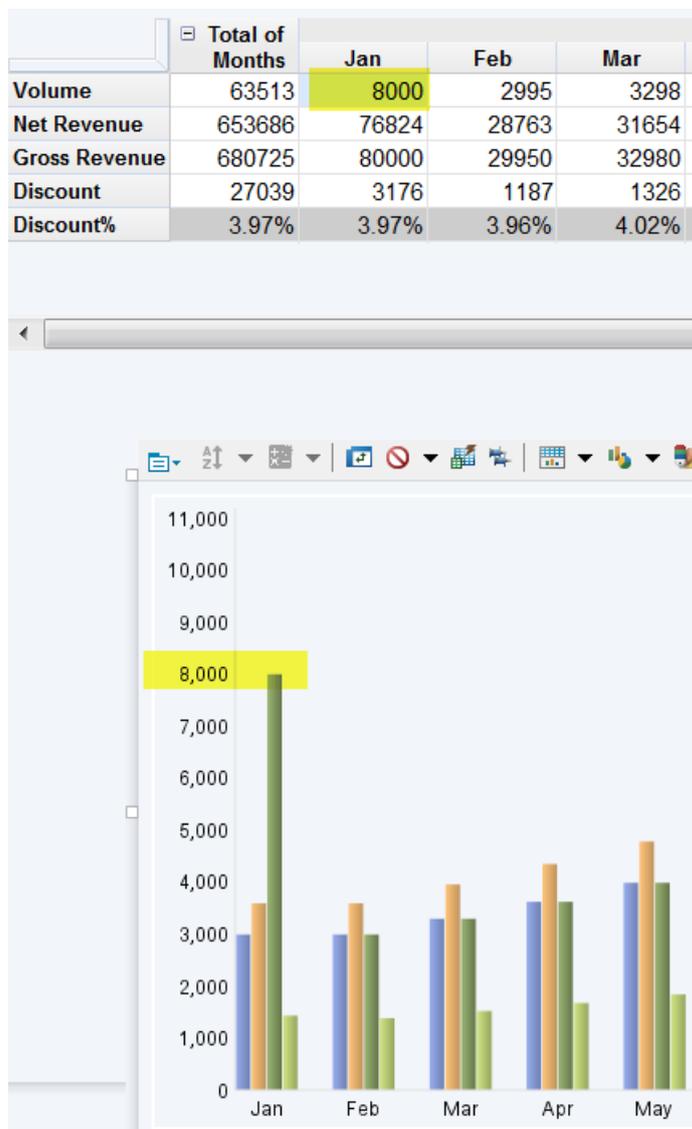
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- 64. Ensure that Volume is selected on the Net Revenue explore point
- 65. Click on the bar of the chart for Jan/Budget Current Year and drag the value up until it reaches 8K



- 66. Check the result in the crosstab



67. Type on top of the 8000 in the crosstab **grow2** (which represents “grow 2% compound”) and enter.

	Total of Months	Jan	Feb	Mar	Apr
Volume	107297	grow2	8160	8323	
Net Revenue	1101720	76824	78367	79886	
Gross Revenue	1147291	80000	81600	83232	
Discount	45571	3176	3233	3346	
Discount%	3.97%	3.97%	3.96%	4.02%	

68. This will grow the data across the months and the result will look as follows:

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IBM Cognos TM1 Enablement Program – Activity A04

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Volume	107297	8000	8160	8323	8490	8659	8833	9009	9189	9373	9561
Net Revenue	1101720	76824	78367	79886	81526	91490	93310	95157	97089	99040	100968
Gross Revenue	1147291	80000	81600	83232	84897	95254	97159	99102	101084	103106	105168
Discount	45571	3176	3233	3346	3371	3764	3849	3945	3995	4066	4200
Discount%	3.97%	3.97%	3.96%	4.02%	3.97%	3.95%	3.96%	3.98%	3.95%	3.94%	3.99%

69. Commit the data and move to the next example.

For Whacky Widgets we will keep London as last year but assume 10% decrease in total and last year’s seasonality.

70. Select Whacky Widgets in the explore point for Products and ensure that Volume is selected on the Net Revenue explore point

71. Click on London/Total of Months in the view by City.

72. Right click and select Hold

Total of Cities	Total of Months
24	4
London	4
Manchester	3
Newcastle	2
Birmingham	2
Glasgow	2
Cardiff	2
Dundee	1
Edinburgh	1
Liverpool	1
Swansea	1
Bristol	
Inverness	

73. Type dec10 in the Total of Cities/Total of Months to decrease the amount by 10% (except for London)

	Total of Months	Jan
Total of Cities	dec10	271
London	451	49
Manchester	355	39
Newcastle	264	29
Birmingham	247	27
Glasgow	236	26
Cardiff	236	26
Dundee	179	19

74. The result will look as follows with London unchanged:

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Total of Cities	2233	244	228	219	209	199	188	178	170	164	151	145	139
London	451	49	47	44	42	40	38	36	34	33	31	29	28
Manchester	312	34	32	31	29	27	26	25	24	23	21	20	19
Newcastle	232	25	24	23	22	21	19	18	18	17	16	15	14
Birmingham	217	24	22	21	20	19	18	18	17	16	15	14	13
Glasgow	207	23	21	20	19	18	18	17	16	15	14	13	13
Cardiff	207	23	21	20	19	18	18	17	16	15	14	13	13
Dundee	157	17	16	16	15	14	13	12	12	11	11	11	10
Edinburgh	129	14	13	12	12	11	11	11	10	10	9	9	8
Liverpool	106	11	11	11	10	10	9	9	8	8	7	7	7
Swansea	104	11	11	11	10	9	9	8	8	8	7	7	6
Bristol	82	9	8	8	8	8	7	6	6	6	5	5	5
Inverness	30	4	3	3	3	3	3	3	3	3	2	2	2

75. Commit the data and move to the next example

Thoughtful Things – we will use last year’s seasonality but have a total of 20K

76. Select Thoughtful Things in the explore point for Products and ensure that Volume is selected on the Net Revenue explore point

77. Type in 20K or 20000 and check the result. This will use the data already in the cube to spread the new total

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Volume	20000	1379	1495	1608	1725	1839	1953	1953	1839	1725
Net Revenue	307929	19684	21326	22953	24597	28858	30653	30653	28857	27875
Gross Revenue	320690	20690	22428	24115	25871	30351	32225	32225	30351	28458
Discount	12760	1005	1103	1161	1274	1493	1572	1572	1494	583
Discount%	3.98%	4.86%	4.92%	4.82%	4.92%	4.92%	4.88%	4.88%	4.92%	2.05%

78. Commit the data and move to the next example.

Potty Possessions – use linear growth from 969 in Jan to 1000 in Dec

79. Select Potty Possessions in the explore point for Products and ensure that Volume is selected on the Net Revenue explore point

80. Highlight the Volume for Jan – Dec in the view (the Totals of Cities is in the context (select the Show Overview area if you want to check).



81. Right click and select Spread Data – Straight Line

82. In the dialog box type 1000 into the End Value and select OK

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
969	969	969	969	969	969	969	969	969	969
14412	14412	14412	14412	15853	15853	15853	15853	15853	15853
14535	14535	14535	14535	15989	15989	15989	15989	15989	15989
123	123	123	123	123	123	123	123	123	123
0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%

Spread Data - Straight Line

Select the cell or range of cells from which you want to initiate the data spreading.

Start Value: 969

End Value: 1000

Extend: Left Right Up Down

Update Action: Replace Add Subtract

OK Cancel

83. The result will look as follows:

Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Volume	11814	969	972	975	977	980	983	986	989	992	994	997	1000
Net Revenue	187490	14412	14454	14496	14538	16038	16084	16130	16176	16222	16268	16314	16360
Gross Revenue	189092	14535	14577	14620	14662	16175	16221	16268	16314	16361	16407	16454	16500
Discount	1601	123	123	124	124	137	137	138	138	139	139	139	140
Discount%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%	0.85%

Note: Remember if the results are not as expected you can use the undo button and then try the action again.

- 84. Check that the city view is also showing that this value has been spread across the individual cities as well.
- 85. Commit the data and move to the next example.

Ominous Objects – hold the 1st Quarter but add 900 to last year’s Volume.

- 86. Select Ominous Objects in the explore point for Products and ensure that Volume is selected on the Net Revenue explore point
- 87. For Volume highlight Jan – Mar and right click – Hold
- 88. Type add1000 on top of the total of Months for Volume. This will be spread over the months that are not held.
- 89. The result will look as follows:

	Total of Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Volume	11557	881	881	881	992	992	992	990	990	990	989	989	989
Net Revenue	190495	13858	13858	13858	15609	17169	16592	16660	16652	16572	16556	16556	16556
Gross Revenue	197587	14096	14096	14096	15877	17465	17465	17425	17425	17425	17405	17405	17405
Discount	7091	238	238	238	269	295	873	765	774	853	849	849	849
Discount%	3.59%	1.69%	1.69%	1.69%	1.69%	1.69%	5.00%	4.39%	4.44%	4.89%	4.88%	4.88%	4.88%

- 90. Commit the data and move to the next example

For Discount% Ominous Objects – 5% discount for all Cities and Months.

- 91. Ensure that Ominous Objects is still selected in the explore point for Products and select Discount% from the Net Revenue explore point.
- 92. Use the quick commands for copy across (>) and copy down(| - the pipe) to enter 5% for all cities and all months for Ominous Objects.
- 93. The result will look as follows:

IBM Cognos TM1 Enablement Program – Activity A04

Rows:		Columns:		Context:						
Cities Cities		Months Months		Budget Current Year Net revenue Measures		Discount% Net Revenue		Ominous Objects Products		
Total of Months		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	
Liverpool	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Glasgow	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Cardiff	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Swansea	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Birmingham	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Edinburgh	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Bristol	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Dundee	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
London	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Inverness	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Newcastle	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	
Manchester	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	

94. Commit the data and save the cdd.

This completes activity A04_Revenue_Budgeting

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