IBM Planning Analytics
2.0

New Features

Note

Before you use this information and the product it supports, read the information in “Notices” on page 89.

Product Information

This document applies to IBM Planning Analytics Version 2.0 and might also apply to subsequent releases.

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Contents

Introduction

This documentation describes the features that are new in IBM® Planning Analytics with Watson.

Planning Analytics integrates business planning, performance measurement, and operational data to enable companies to optimize business effectiveness and customer interaction regardless of geography or structure. Planning Analytics 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).

Software environments

To review an up-to-date list of environments supported by IBM Planning Analytics, create a detailed system requirements report using the Software Product Compatibility Reports tool (https://www.ibm.com/software/reports/compatibility/clarity/index.html).

Known issues

To view known issues and their workarounds, see the IBM Support portal (http://www.ibm.com/support).

For information about using the Support portal, see the IBM Support portal assistance (http://www.ibm.com/software/support/portal/sp-help.html).

Accessibility

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.IBM Planning Analytics with Watson has some components that support accessibility features. IBM Cognos® TM1® Performance Modeler, IBM Cognos Insight, and Cognos TM1 Operations Console have accessibility features. For information about these features, see the accessibility section in the documentation for each component.

IBM HTML documentation has accessibility features. Because PDF documents are supplemental, they include no added accessibility features.

Deprecation

Documentation of functionality might differ from what is available in your environment because functionality is deprecated or removed in the current release of Planning Analytics. In the documentation, Deprecated indicates deprecated functionality that will be removed in a future release. If you use deprecated functionality, it is recommended that you take appropriate action before you upgrade. In the documentation, Not supported indicates functionality that is no longer available or supported in the current release.

Samples disclaimer

The Sample Outdoors Company, Great Outdoors Company, GO Sales, any variation of the Sample Outdoors or Great Outdoors names, and Planning Sample depict fictitious business operations with sample data used to develop sample applications for IBM and IBM customers. These fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values is coincidental. Other sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data

to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.

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. What's new in Planning Analytics

Read about what's new or updated in IBM Planning Analytics with Watson and components that are installed with Planning Analytics, such as TM1 Server, TM1 Web, TM1 Performance Modeler, and TM1 Architect. Some updates affect only IBM Planning Analytics Local.

Planning Analytics 2.0.9.7 - April 15, 2021

IBM Planning Analytics Local version 2.0.9.7 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.7 includes updates for IBM TM1 Server version 11.8.6.

IBM Planning Analytics with Watson version 2.0.9.7 includes numerous improvements and defect fixes, as well as the deprecation of two TM1 database parameters.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

Deprecated TM1 database parameters

The following TM1 database parameters are deprecated as of IBM Planning Analytics with Watson version 2.0.9.7.

LockPagesInMemory

The LockPagesInMemory database parameter, which managed paging behavior and was applicable only to TM1 databases running on a Microsoft® Windows 64-bit operating system, is fully deprecated.

MTQ.CTreeRedundancyReducer

Due to a previously identified and communicated issue concerning database stability when `MTQ.CTreeRedundancyReducer=T`, this parameter is fully deprecated as of Planning Analytics version 2.0.9.7.

You can review the previous announcement of recommended usage of MTQ.CTreeRedundancyReducer in this tech note.

User modifications within CAM groups are now captured in the TM1 audit log

The TM1 database updates group membership in TM1 based on information from Cognos Authentication Manager when a user logs into TM1 using CAM. These events are now captured in the TM1 audit log.

The audit log now captures events such as:

- user creation in CAM
- user deletion in CAM
- user addition to a CAM group
- user removal from a CAM group

This sample audit log extract shows multiple events where user modifications in CAM are written to the TM1 audit log.

```
<Commit ts="20210318202610" client="Cognos Users/user1 user1">
"45","CAMID(""CognosEx:u:uid=tester2"")","Client 'CAMID(""CognosEx:u:uid=tester2"")' was
deleted."
</Commit>

<Commit ts="20210318202817" client="Cognos Users/tester1 tester1">
"31","CAMID(""::All Authenticated Users"")","Cognos Users/tester1 tester1","Client 'Cognos
```

```
Users/tester1 tester1' was assigned to group 'CAMID(""::All Authenticated Users"")'."
"31","CAMID(""::Everyone"")","Cognos Users/tester1 tester1","Client 'Cognos Users/tester1
tester1' was assigned to group 'CAMID(""::Everyone"")'."
"31","CAMID(":Analytics Administrators"")","Cognos Users/tester1 tester1","Client 'Cognos
Users/tester1 tester1' was assigned to group 'CAMID(":Analytics Administrators"")'."
"144","Cognos Users/tester1 tester1","9.30.77.16","User 'Cognos Users/tester1 tester1'
successfully logged in from address '9.30.77.16'."
</Commit>

<Commit ts="20210318203231" client="Cognos Users/tester7 tester7">
"31","CAMID(":Analytics Users"")","Cognos Users/tester7 tester7","Client 'Cognos Users/tester7
tester7' was assigned to group 'CAMID(":Analytics Users"")'."
"144","Cognos Users/tester7 tester7","9.30.77.16","User 'Cognos Users/tester7 tester7'
successfully logged in from address '9.30.77.16'."
</Commit>

<Commit ts="20210318204344" client="Cognos Users/tester5 tester5">
"32","CAMID(":TM1 Group 3"")","Cognos Users/tester5 tester5","Client 'Cognos Users/tester5
tester5' was removed from group 'CAMID(":TM1 Group 3"")'."
"32","CAMID(":Tm1 Role 1"")","Cognos Users/tester5 tester5","Client 'Cognos Users/tester5
tester5' was removed from group 'CAMID(":Tm1 Role 1"")'."
"144","Cognos Users/tester5 tester5","9.30.77.16","User 'Cognos Users/tester5 tester5'
successfully logged in from address '9.30.77.16'."
</Commit>

<Commit ts="20210318205451" client="Cognos Users/tester5 tester5">
"144","Cognos Users/tester5 tester5","9.30.77.16","User 'Cognos Users/tester5 tester5'
successfully logged in from address '9.30.77.16'."
</Commit>

<Commit ts="20210318205520" client="Cognos Users/tester7 tester7">
"32","10000","Cognos Users/tester7 tester7","Client 'Cognos Users/tester7 tester7' was removed
from group '10000'."
"32","10100","Cognos Users/tester7 tester7","Client 'Cognos Users/tester7 tester7' was removed
from group '10100'."
"144","Cognos Users/tester7 tester7","9.30.77.16","User 'Cognos Users/tester7 tester7'
successfully logged in from address '9.30.77.16'."
</Commit>

<Commit ts="20210318210127" client="Cognos Users/tester8 tester8">
"32","10000","Cognos Users/tester8 tester8","Client 'Cognos Users/tester8 tester8' was removed
from group '10000'."
"32","10100","Cognos Users/tester8 tester8","Client 'Cognos Users/tester8 tester8' was removed
from group '10100'."
"32","10110","Cognos Users/tester8 tester8","Client 'Cognos Users/tester8 tester8' was removed
from group '10110'."
"144","Cognos Users/tester8 tester8","9.30.77.16","User 'Cognos Users/tester8 tester8'
successfully logged in from address '9.30.77.16'."
</Commit>

<Commit ts="20210318210142" client="Cognos Users/user1 user1">
"144","Cognos Users/user1 user1","9.30.77.16","User 'Cognos Users/user1 user1' successfully
logged in from address '9.30.77.16'."
</Commit>
```

You can disable the capture of user modifications within CAM groups in the TM1 audit log. Set `CheckCAMClientAlias =F` in Tm1s.cfg if you do not want CAM user modification information to be written to the audit log.

For more details on using the audit log, see the Audit Log.

Planning Analytics 2.0.9.6 - March 16, 2021

IBM Planning Analytics Local version 2.0.9.6 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.6 includes updates for IBM TM1 Server version 11.8.5.

IBM Planning Analytics with Watson version 2.0.9.6 includes numerous improvements and defect fixes, but does not include new features.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

Planning Analytics 2.0.9.5 - February 8, 2021

IBM Planning Analytics Local version 2.0.9.5 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.5 includes updates for IBM TM1 Server version 11.8.4.

IBM Planning Analytics with Watson version 2.0.9.5 includes numerous improvements and defect fixes, but does not include new features.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

Change to default value of FIPSOperationMode in tm1s.cfg and cogstartup.xml

As of IBM Planning Analytics 2.0.9.5, the default value of the **FIPSOperationMode** configuration parameter in `tm1s.cfg` and `cogstartup.xml` is **FIPSOperationMode=2**.

The default value in previous versions of Planning Analytics was **FIPSOperationMode=1**.

The change to **FIPSOperationMode=2** is necessary to enable future security updates to third-party libraries in IBM Global Security Kit (GSKit).

Disable DES and 3DES Ciphers in IBM Planning Analytics to mitigate false-positive security scans

To address the vulnerabilities exploited by the SWEET32 Birthday attack (CVE-2016-2183), IBM Planning Analytics 2.0.9.5 has enabled the restriction of payload size to 32GB via GSKit. However, the DES and 3DES ciphers will continue to be available and will show up as false positives on security scans. To prevent these false positives, remove the DES and 3DES ciphers from your Planning Analytics configuration.

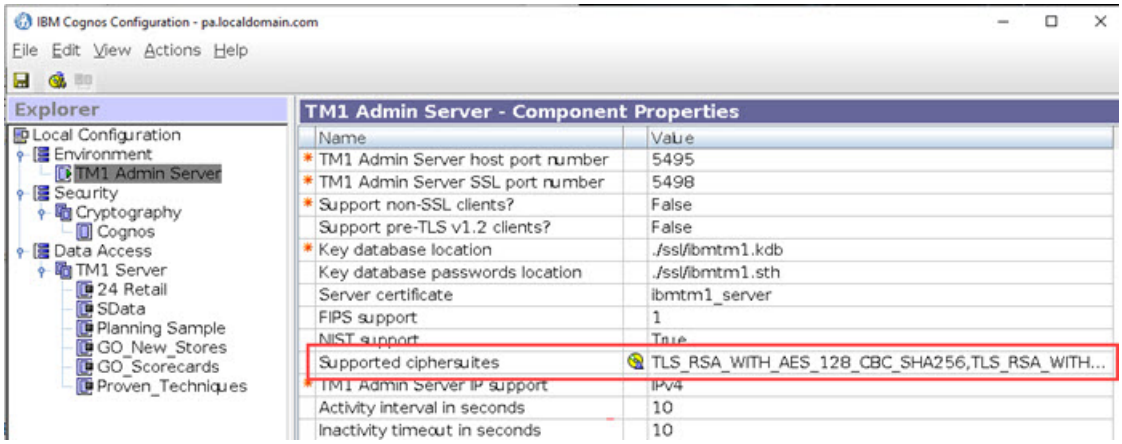
About this task

The configuration changes described here are applicable only to Planning Analytics Workspace Local. You do not have to make any modifications to Planning Analytics Workspace on Cloud.

Procedure

1. Stop all of the TM1 Server database services and the TM1 Admin Server service in your environment.
2. Open Cognos Configuration for the TM1 Admin Server service and set the following ciphers in the **Supported Cipher Suites** property:

```
TLS_RSA_WITH_AES_128_CBC_SHA256,TLS_RSA_WITH_AES_256_CBC_SHA256,
TLS_RSA_WITH_AES_128_GCM_SHA256,TLS_RSA_WITH_AES_256_GCM_SHA384,
TLS_ECDHE_ECDSA_WITH_AES_128_CBC_SHA256,TLS_ECDHE_ECDSA_WITH_AES_256_CBC_SHA384,
TLS_ECDHE_ECDSA_WITH_AES_128_GCM_SHA256,TLS_ECDHE_ECDSA_WITH_AES_256_GCM_SHA384,
TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA256,TLS_ECDHE_RSA_WITH_AES_256_CBC_SHA384,
TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256,TLS_ECDHE_RSA_WITH_AES_256_GCM_SHA384
```



3. Add the following line to the `Tm1s.cfg` file for each TM1 Server database:

```
tlsCipherList=TLS_RSA_WITH_AES_128_CBC_SHA256,
TLS_RSA_WITH_AES_256_CBC_SHA256,TLS_RSA_WITH_AES_128_GCM_SHA256,
TLS_RSA_WITH_AES_256_GCM_SHA384,TLS_ECDHE_ECDSA_WITH_AES_128_CBC_SHA256,
TLS_ECDHE_ECDSA_WITH_AES_256_CBC_SHA384,TLS_ECDHE_ECDSA_WITH_AES_128_GCM_SHA256,
TLS_ECDHE_ECDSA_WITH_AES_256_GCM_SHA384,TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA256,
TLS_ECDHE_RSA_WITH_AES_256_CBC_SHA384,TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256,
TLS_ECDHE_RSA_WITH_AES_256_GCM_SHA384
```

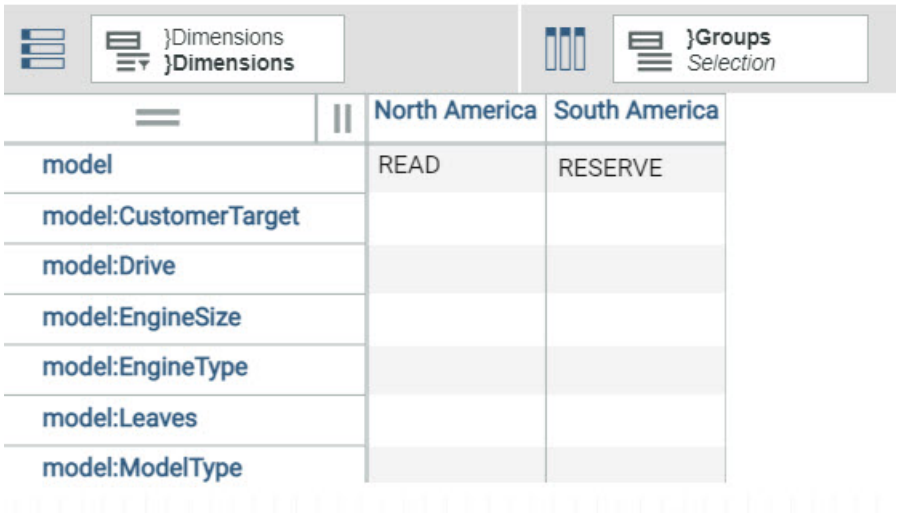
4. Start the TM1 Admin Server service and all of your TM1 Server database services.

Change in dimension hierarchy security

Planning Analytics 2.0.9.5 introduces an enhancement to hierarchy security.

You can now define security for dimension hierarchies independent of the parent dimension in the }DimensionSecurity control cube.

In previous version of Planning Analytics, dimension hierarchies inherited security from the parent dimension. There was no need to explicitly define security for an hierarchy in the }DimensionSecurity control cube. For example, here the North America user group inherited Read access for all hierarchies of the Model dimension, while the South America user group inherited Reserve access for all hierarchies of the dimension.

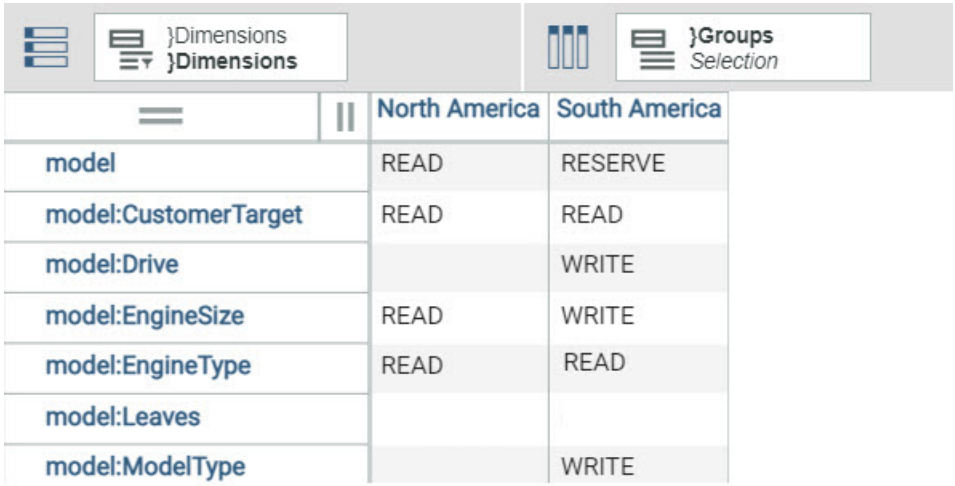


As of Planning Analytics 2.0.9.5, hierarchies no longer inherit security from the parent dimension.

Important: If you want a user group to have access to a dimension hierarchy, you must explicitly define hierarchy security in the }DimensionSecurity control cube. If you do not define security for a user group to an hierarchy, members of the user group cannot see the hierarchy in Planning Analytics.

You can assign hierarchy security equivalent to or lower than the security defined for the parent dimension. A user group cannot have higher security access to a hierarchy than to the parent dimension.

Here's an example of how you define hierarchy security in Planning Analytics 2.0.9.5 and later:



	North America	South America
model	READ	RESERVE
model:CustomerTarget	READ	READ
model:Drive		WRITE
model:EngineSize	READ	WRITE
model:EngineType	READ	READ
model:Leaves		
model:ModelType		WRITE

Each hierarchy has security explicitly set for all user groups. Note that a blank cell is equivalent to None security.

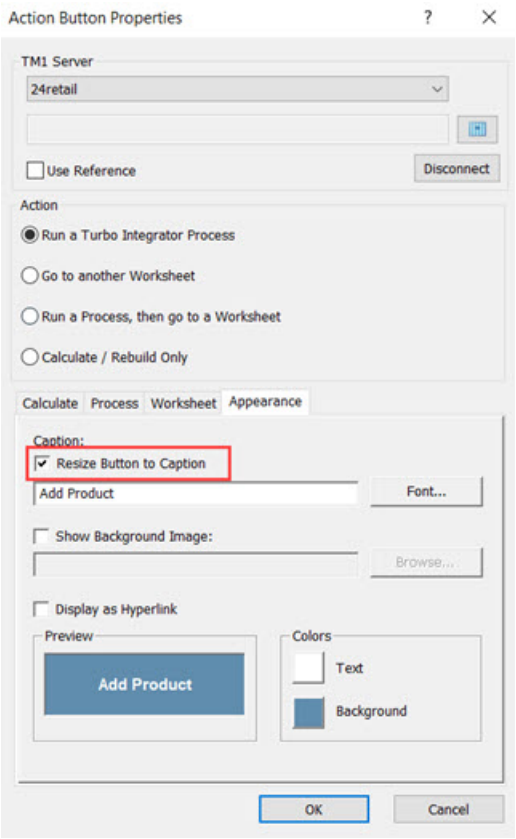
Action Button is misaligned in Perspectives using Office Excel 2016 - 2019

An Action Button created in Excel 2016 - 2019 can sometimes appear misaligned or the text may be improperly positioned on the button.

You can see this issue in the following image, where the **Set Security** text is improperly positioned on the button and the button is misaligned to the grid.

To correct this issue:

1. Open the Excel sheet that contains the Action Button.
2. Right-click the button, then click **Properties**.
3. Clear and re-select the **Resize Button to Caption** option.
4. Click **OK**.



Planning Analytics 2.0.9.4 - December 17, 2020

IBM Planning Analytics Local version 2.0.9.4 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.4 includes updates for IBM TM1 Server version 11.8.3.

IBM Planning Analytics with Watson version 2.0.9.4 includes numerous improvements and defect fixes, as well as some new features.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

Secure Shell URL support in Git integration

Secure Shell (SSH) URL is supported to access the Git repository.

The REST API actions `GitInit`, `GitStats`, `GitPull`, `GitPush`, and `GitDeploy` can take three additional parameters to pass the SSH credential. These additional parameters are `PublicKey`, `PrivateKey`, and `Passphrase`.

The content of the `PublicKey` and `PrivateKey` parameters should be identical to the content of the generated SSH key files. `Passphrase` is the same as was specified when generating the private key.

The `PrivateKey` and `Passphrase` will not be written to the server log.

The Git credential is cached in the HTTP session.

This example shows a GitInit with the supported SSH parameters:

```
POST /api/v1/GitInit
{
 "URL": "git@github.com:GithubAccountXXX/RepoXXX.git",
 "Deployment": "prod",
 "PublicKey": "ssh-rsa AAAAB3NzaC1yc2Exxx...",
 "PrivateKey": "----BEGIN RSA PRIVATE KEY----\nMIIJKAIBxxx...",
```

```
 "Passphrase": "xxx"
}
```

Assuming Git is initialized with SSH URL, a full GitPull looks like this:

```
POST /api/v1/GitPull
{
 "Branch": "DB_PlanSamp",
 "PublicKey": "ssh-rsa AAAAB3NzaC1yc2Exxx...",
 "PrivateKey": "-----BEGIN RSA PRIVATE KEY-----\nMIIJKAIBxxx..."
 "Passphrase": "xxx"
}
```

However, since the Git credential is cached, you can exclude the credentials in the GitPull request if you'd like:

```
POST /api/v1/GitPull {
  "Branch": "DB_PlanSamp"
}
```

Once Git is initialized with SSH URL, `GitStats`, `GitPush`, and `GitDeploy` can be used in the same manner as `GitPull`, shown above.

HTTP proxy support in Git integration

The Git repository that the TM1 server connects to for Git integration functionality is frequently isolated behind a firewall and only reachable via an HTTP proxy. Proxy access is supported on TM1 server.

Proxy support is provided via the Git `http.proxy` parameter, which is defined at https://git-scm.com/docs/git-config.

`http.proxy` specifies the URL of the HTTP proxy when invoking the actions `GitInit` and `GitDeploy`. The proxy routes traffic to the Git repository that is specified by the URL parameter, which uses HTTPS protocol.

For example, this `GitInit` routes traffic through the `http://localhost:8888` proxy to the repository at `https://github.com/GithubaccountXXX/RepoXXX.git`.

```
POST /api/v1/GitInit
{
 "URL": "https://github.com/GithubAccountXXX/RepoXXX.git",
 "Deployment": "prod",
 "Username": "GitUserXXX",
 "Password": "xxx",
 "Config":
 {
   "http.proxy": "http://localhost:8888"
 }
}
```

Improved member selection in query to TM1 Server when using multiple hierarchies

In previous releases of Planning Analytics, query member selection with multiple hierarchies could sometimes include unnecessary members, leading to inconsistent query performance.

As of Planning Analytics 2.0.9.4, members selection is now predictable and consistent, resulting in consistent query performance.

In some limited circumstances, you might encounter a query that exceeds the current **MaximumViewSize** server configuration setting. When this occurs, it is an effect of TM1 Server in 2.0.9.4 doing a better job of selecting the members for a multiple hierarchies query to guarantee consistent query performance. We are working to reduce the additional memory usage for these limited cases in an upcoming release.

If you encounter a query that exceeds the **MaximumViewSize**, the current work-around is to increase the **MaximumViewSize** value in `Tm1s.cfg` to accommodate the increased memory usage.

For details on the **MaximumViewSize** parameter, see https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_cloud_mg.2.0.0.doc/c_maximumviewsize_1.html.

The chore StartTime property time is stored and represented as Coordinated Universal Time and does not vary for Daylight Saving Time

Documentation has been updated to reflect that the `StartTime` property for a chore is represented as Coordinated Universal Time (UTC).

UTC is a fixed time that does not vary for Daylight Saving Time. Accordingly, a chore start time remains concurrent with UTC, regardless of Daylight Saving Time status for any location.

When the TM1 server stores or returns a local time, or 'time relative location,' the server uses a DateTimeOffset that represents a date/time value, together with an offset that indicates how much that value differs from UTC in the physical location where the server resides. This offset does not vary for Daylight Saving Time.

Users of the TM1 OData Rest API need to verify compliance with the standard http://docs.oasis-open.org/odata/odata-csdl-json/v4.01/odata-csdl-json-v4.01.html#sec_DateTimeOffset. Failure to verify compliance will result in user-built applications failing when the TM1 Server responds with DateTimeOffset according to the standard

Enhanced SQL error logging in tm1server.log

As of Planning Analytics 2.0.9.4, the TM1 Server now processes more ODBC driver errors and reports them in the server message log (`tm1server.log`). As a result, you may see SQL errors in `tm1server.log` that were not previously reported.

These errors from the ODBC driver have always existed, but were not written to the server message log prior to Planning Analytics 2.0.9.4. The errors are discoverable using the tracing capability of your ODBC administrator tool.

Any SQL errors reported in `tm1server.log` originate from the ODBC driver. You can use these errors to review issues with your ODBC driver and to pursue support with your ODBC vendor.

Planning Analytics 2.0.9.3 - October 9, 2020

IBM Planning Analytics Local version 2.0.9.3 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.3 includes updates for IBM TM1 Server version 11.8.2.

IBM Planning Analytics with Watson version 2.0.9.3 includes numerous improvements and defect fixes. This version does not include new features. However, PMHub is fully deprecated as of version 2.0.9.3, as previously announced in the IBM Planning Analytics 2.0 deprecation notices. For details about the impact of this deprecation, see PMHub deprecation.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

PMHub deprecation

PMHub is fully deprecated as of IBM Planning Analytics with Watson version 2.0.9.3, as previously announced in the IBM Planning Analytics 2.0 deprecation notices.

IBM Planning Analytics for Microsoft Excel must use hubless mode when upgrading to 2.0.9.3. In hubless mode, Planning Analytics for Microsoft Excel connects to Planning Analytics sources via Planning Analytics Workspace.

Planning Analytics for Microsoft Excel version 2.0.41 and prior do not support hubless mode. If you have version 2.0.41 or prior, please upgrade to the most recent version of Planning Analytics for Microsoft Excel when you install IBM Planning Analytics with Watson version 2.0.9.3

Planning Analytics for Microsoft Excel version 2.0.52 and later forces all non-overridden connections to IBM Planning Analytics with Watson version 2.0.9 or later to use hubless mode.

If you currently use an overridden connection to IBM Planning Analytics with Watson, you must remove the override to connect to IBM Planning Analytics with Watson version 2.0.9.3.

An overridden connection looks like this: `http://<hostname>/?pmhub&rest`. For example, `http://planninganalytics.ibmcloud.com/?pmhub&rest`.

You must remove the override and use `http://<hostname>/`. For example, `http://planninganalytics.ibmcloud.com/`.

Note that Exploration Views and Quick Reports encode their host information internally. As long as the <hostname> remains the same when moving from an overridden to a non-overridden connection, you do not need to modify any views or reports. In any circumstance, it is preferable to update your connection before interacting with any reporting content.

TM1 Server on Linux requires the Java shared object libjsig.so to be in the LD_LIBRARY_PATH

As of TM1 Server version 11.8.2 (Planning Analytics 2.0.9.3), the TM1 Server executable (`tm1s.exe`) requires the Java shared object `libjsig.so` to be in the server's `LD_LIBRARY_PATH` to successfully start up or shut down a TM1 Server on Linux.

The TM1 Server requires Java to support the `ExecuteJavaN` or `ExecuteJavaS` TurboIntegrator functions. Additionally, with the later versions of Java 8, the TM1 Server needs to be able to shut down the JVM via the `libjsig.so` library. This library is required whether you use `ExecuteJavaN` or `ExecuteJavaS` functions or not. The link to the `libjsig.so`, which is necessitated to support the noted Turbointegrator functions, is also required to successfully start or stop the TM1 Server. If the library is missing, you cannot start or stop the server.

The `start_tm1.sh` script has been modified to find the required Java shared object `libjsig.so` by looking for the `JAVA_HOME` environment variable and loading the required library according to processor architecture.

Depending on your processor architecture, `libjsig.so` is located in one of these locations:

- `${JAVA_HOME}/lib/amd64/libjsig.so` for x86_64
- `${JAVA_HOME}/lib/s390x/libjsig.so` for s390x
- `${JAVA_HOME}/lib/ppc64le/libjsig.so` for ppc64le

It is important to have Java 8 installed and the `JAVA_HOME` environment variable set, otherwise the TM1 Server cannot start up or shut down.

Planning Analytics 2.0.9.2 - July 27, 2020

IBM Planning Analytics Local version 2.0.9.2 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.2 includes updates for IBM TM1 Server version 11.8.1.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

TM1 Web is no longer part of the Planning Analytics long cadence (LC) release

As of the 2.0.9.2 LC release of IBM Planning Analytics with Watson, TM1 Web is no longer included in the long cadence release.

Instead, new versions of TM1 Web will be available approximately once a month, similar to the release schedules of IBM Planning Analytics Workspace and IBM Planning Analytics for Microsoft Excel. The first version of TM1 Web to be available on this new schedule is 2.0.55 SC.

New installer for TM1 Web

As of the 2.0.9.2 LC/2.0.55 SC releases of IBM Planning Analytics with Watson, TM1 Web is installed with the IBM Planning Analytics Spreadsheet Services installer. TM1 Web is no longer part of the web tier within the Planning Analytics Local installer.

For details on installing TM1 Web with the IBM Planning Analytics Spreadsheet Services installer, see Installing and configuring Planning Analytics TM1 Web.

Planning Analytics 2.0.9.1 - May 21, 2020

IBM Planning Analytics Local version 2.0.9.1 and the cloud release of IBM Planning Analytics with Watson version 2.0.9.1 includes updates for IBM TM1 Server version 11.8.0.

IBM Planning Analytics with Watson version 2.0.9.1 includes numerous improvements and defect fixes, but does not include new features.

Note: Updates to each version of IBM Planning Analytics with Watson are cumulative. If you are upgrading IBM Planning Analytics with Watson, review all updates since your installed version to plan your upgrade and application deployment.

Chapter 2. What's new in Planning Analytics Workspace

Find out what's new or changed in the most recent release of IBM Planning Analytics Workspace.The new features described here always reflect the full capabilities of Planning Analytics Workspace on cloud.

If you use Planning Analytics Workspace Local, some features might not be available. For more information, see Applicability of Planning Analytics Workspace documentation (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_prism_gs.2.0.0.doc/c_prism_applicability_documentation.html).

2.0.63 - What's new, April 21, 2021

Learn about new features and known issues in version 2.0.63 of IBM Planning Analytics Workspace in the following topics.

Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

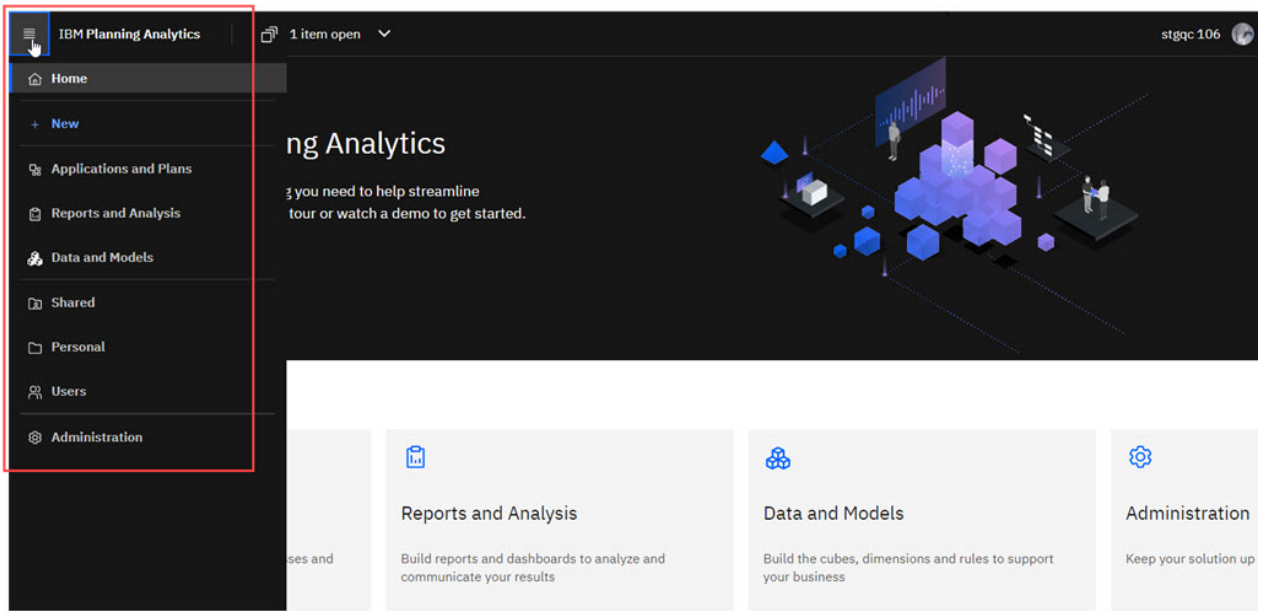
You can view the fix lists for this and previous versions of Planning Analytics Workspace at https://www.ibm.com/support/pages/ibm-planning-analytics-20-fix-lists#anchor2.

Design and usability improvements

Several design and user interface enhancements are included in the Planning Analytics Workspace 2.0.63 release, signifying our continued investment in usability. Here are a few of the areas we have improved in Planning Analytics Workspace 2.0.63.

Collapsible navigation panel

The navigation panel is now available directly from the top left Home menu.

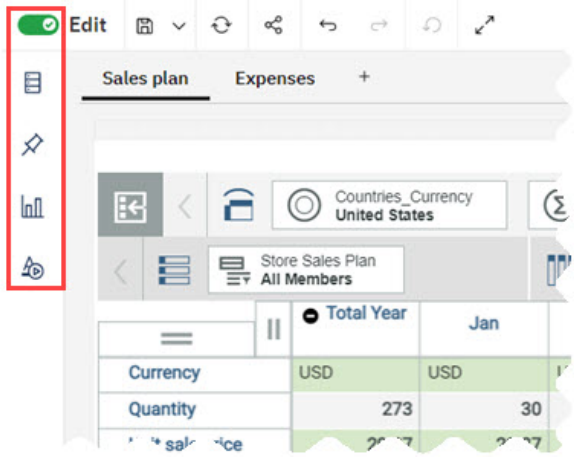


You no longer need to return to the Workspace home page to navigate or access Workspace content. For example, if you’re working on the Administration page, you can navigate directly to a book by opening the navigation panel, opening the Shared folder, and searching for the book.

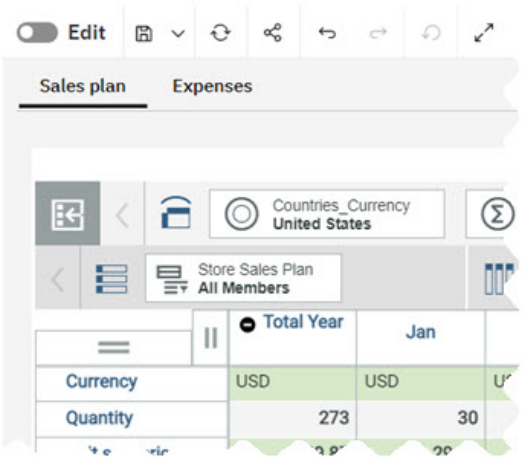
Database Tree hidden when not in edit mode

The database tree is hidden when a book is not in edit mode. To reveal the database tree, the book must be set to edit mode.

Edit mode enabled



Edit mode disabled

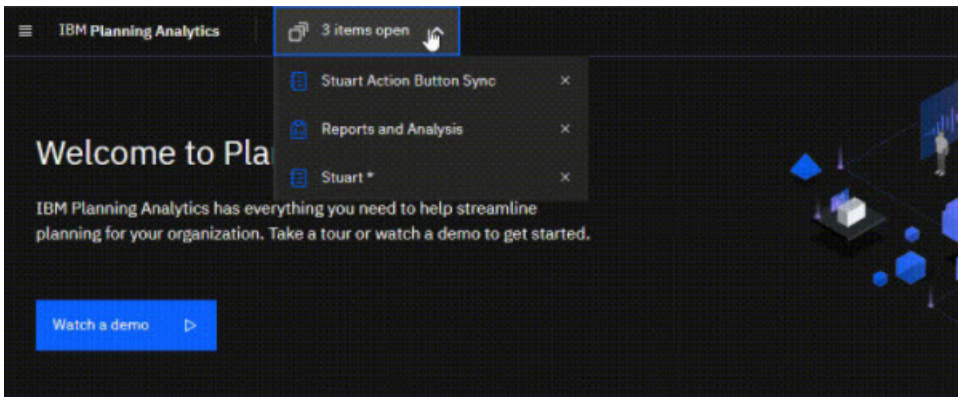


This change provides more horizontal space for users consuming the book. This change also makes it clear that you must enable edit mode to incorporate content from the database tree into the book.

Note that the Edit pencil icon has been replaced with a labeled Edit switch. This change makes it easier to discern when a book is in edit mode.

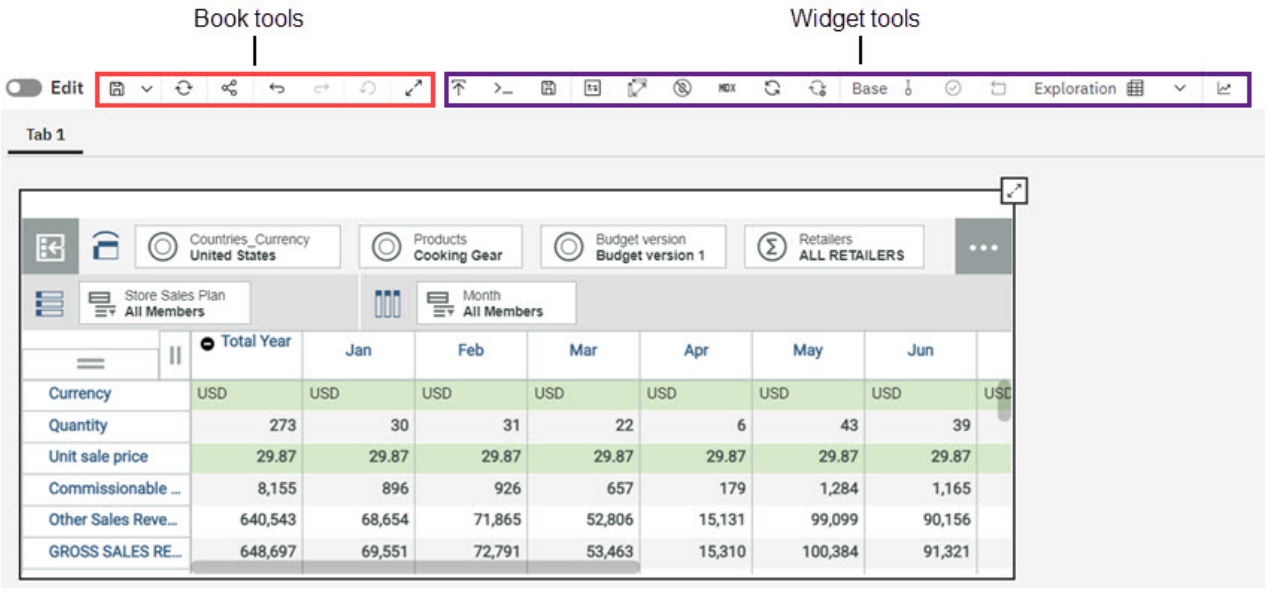
Left-aligned switcher

The content switcher is now left-aligned for a consistent look and feel with Cognos Analytics. The content switcher no longer includes a Home option. To return to the home page, click **IBM Planning Analytics** at the top of the screen.



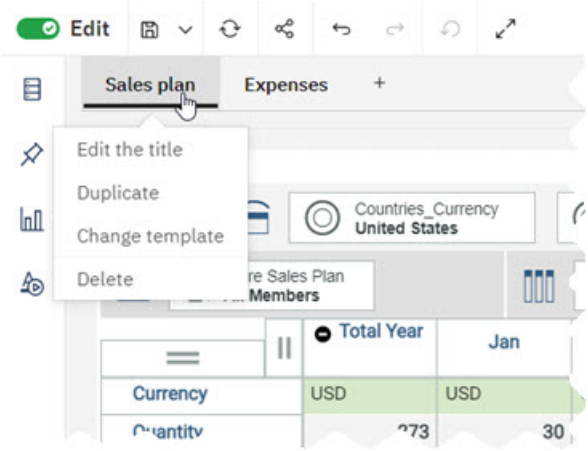
Combined toolbar

Book and widget toolbars are now integrated into a single toolbar. This change improves the vertical space available to book creators and consumers. Buttons for each widget are displayed to the right of the book buttons after selecting the widget.



Tab controls

Clicking on a tab while in edit mode now presents a menu of available actions.



Save and Move dialogs

The Save and Move dialogs have been updated to support searching, sorting, creating folders, and replacing books. You can search for folders, books, and views in either the shared or personal folder.

Rename a TM1 database

Planning Analytics on Cloud customers can now rename TM1 databases by using Planning Analytics Workspace **Administration**.

The self-service updates the database directory in the `prod` folder, and the database name in the `tm1s.cfg` file to match the new name.

You must use the Planning Analytics Workspace new interface, which is also referred to as New Experience, to rename the database. This functionality is not available in the Planning Analytics Workspace Classic Experience.

For more information, see Rename a database.

Remove users in Planning Analytics Workspace

Planning Analytics on Cloud administrators can remove multiple users at once in Planning Analytics Workspace **Administration**.

Administrators remove users only from the primary tenant (environment), and the system then removes the users from all secondary tenants (environments). The users are automatically removed from IBM Subscriptions Management, from groups that they were members of, and from all environments that they were associated with. Each user's personal folder is renamed to **Unknown**, and the user's personal assets are moved to this folder. User's shared assets remain in the shared folder.

For more information, see Remove users in Planning Analytics Workspace.

Use the new Box Plot visualization

Use a box plot visualizations to identify outliers and compare distributions in your data.

You can create a box plot to show the median, quartiles, and outlier and extreme values for a variable. The inter-quartile range is the difference between the 75th and 25th percentiles and corresponds to the length of the box. The middle line is the 50th percentile.

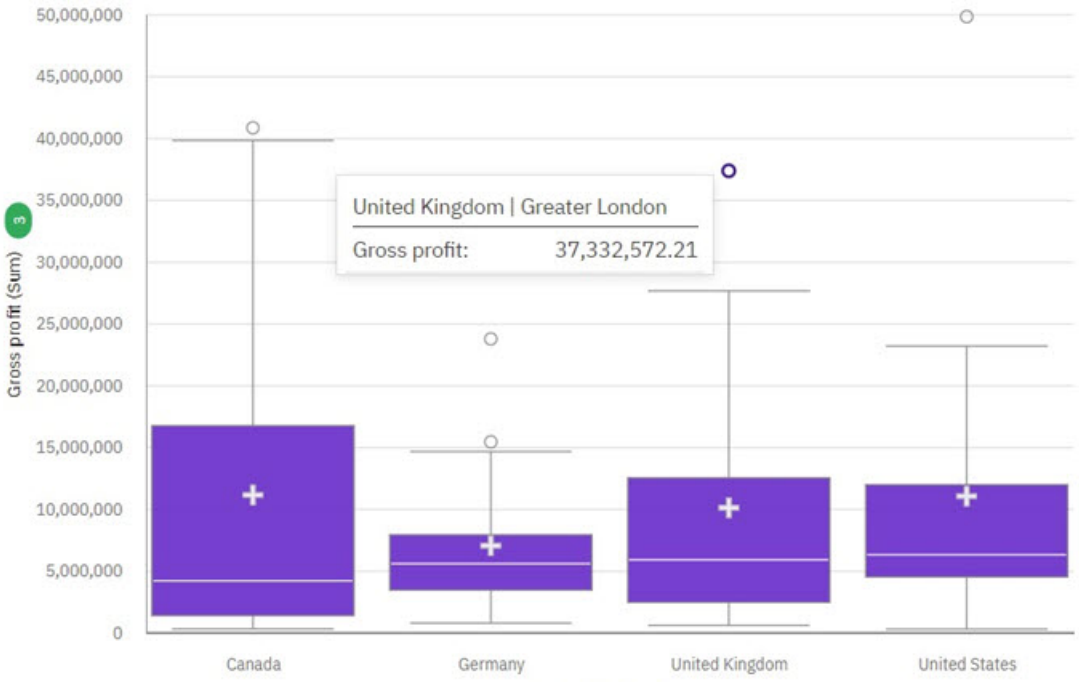
Above and under each box, 'whiskers' give additional information about the spread of the data.

Outliers are represented by "o" signs beyond the whiskers.

The mean score in a box plot is presented by a "+" sign.

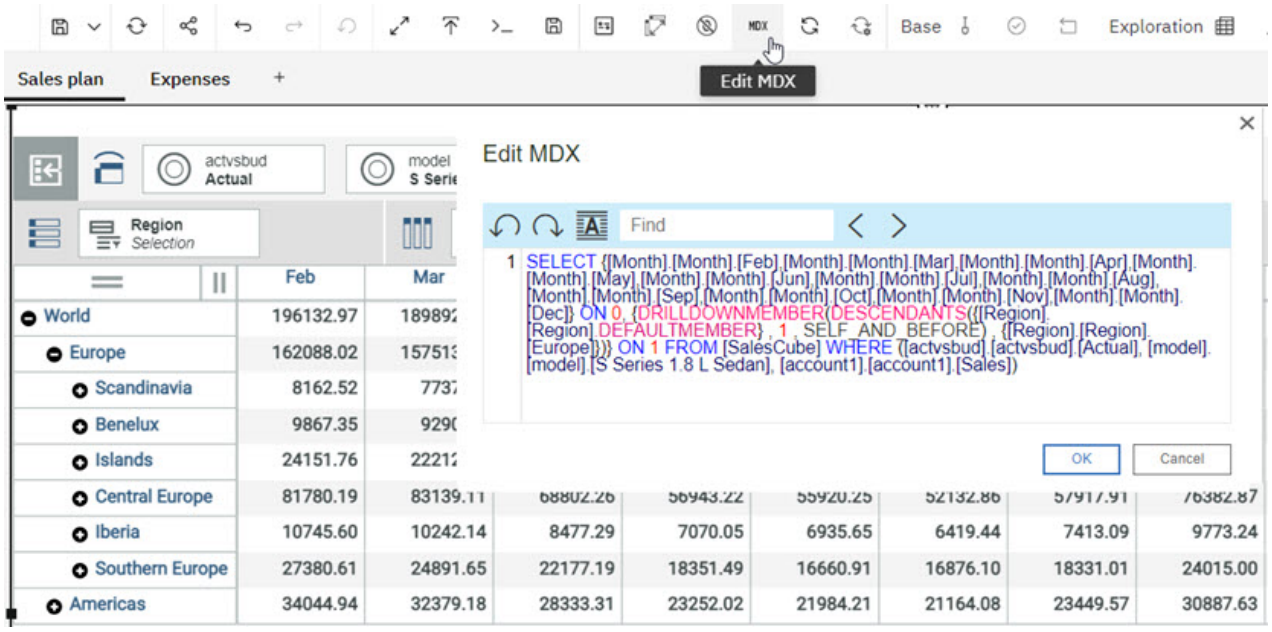
Use the **Key** field in a box plot visualization to determine the items for which you want to identify outliers and compare distributions.

This box plot example shows the gross profit statistics for various markets.



Edit MDX source for a cube view

You can use the new **MDX** button on the toolbar to view and edit the MDX source for a cube view.



2.0.62 - What's new, March 17, 2021

Learn about new features and known issues in version 2.0.62 of IBM Planning Analytics Workspace in the following topics.

Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

You can view the fix lists for this and previous versions of Planning Analytics Workspace at https://www.ibm.com/support/pages/ibm-planning-analytics-20-fix-lists#anchor2.

Delete a TM1 database

Planning Analytics on Cloud customers can now delete TM1 databases by using Planning Analytics Workspace **Administration**. You no longer need to submit a support ticket to have a TM1 database deleted for you.

The self-service delete action removes the database from the user interface. However, the database directory and its contents are retained on the data tier. You can later decide whether they should be deleted, moved, copied, or kept on the data tier.

You must use the Planning Analytics Workspace new interface, which is also referred to as New Experience, to delete the database. This functionality is not available in the Planning Analytics Workspace Classic Experience.

Note: To rename a TM1 database, you still need to open a support ticket.

For more information, see Delete a database.

Seamlessly scroll through all objects in the data tree

The **Load more** setting has been removed from the data tree in Planning Analytics Workspace. You can now scroll infinitely through all items in a node in the data tree.

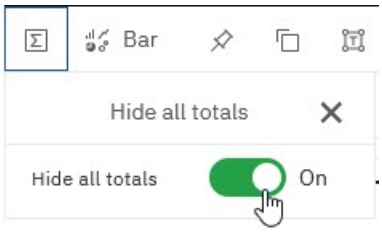
The **Load more** setting for the data tree was introduced in Planning Analytics Workspace 2.0.61. This setting determined the number of items within a node that could be viewed before you had to click **Load**

more to retrieve and display additional items. With the introduction of infinite scrolling, this setting is no longer necessary and it has been removed from the Settings options.

Hide totals in a visualization with a new toolbar button

You can now hide totals in visualizations with a couple of clicks on a new toolbar button.

To hide totals in a visualization, click the new **Hide all totals** button on the toolbar, then turn on the **Hide all totals** option.



To restore totals in the visualization, turn off the **Hide all totals** option.

Retrieve data from multiple TM1 databases in a websheet (Planning Analytics Workspace local only)

You can now retrieve data from more than one TM1 database in a websheet.

All databases referenced in a websheet must be registered on the same Admin host. You can retrieve data from multiple databases only in Custom Reports and Dynamic Reports, which use the VIEW function to retrieve data.

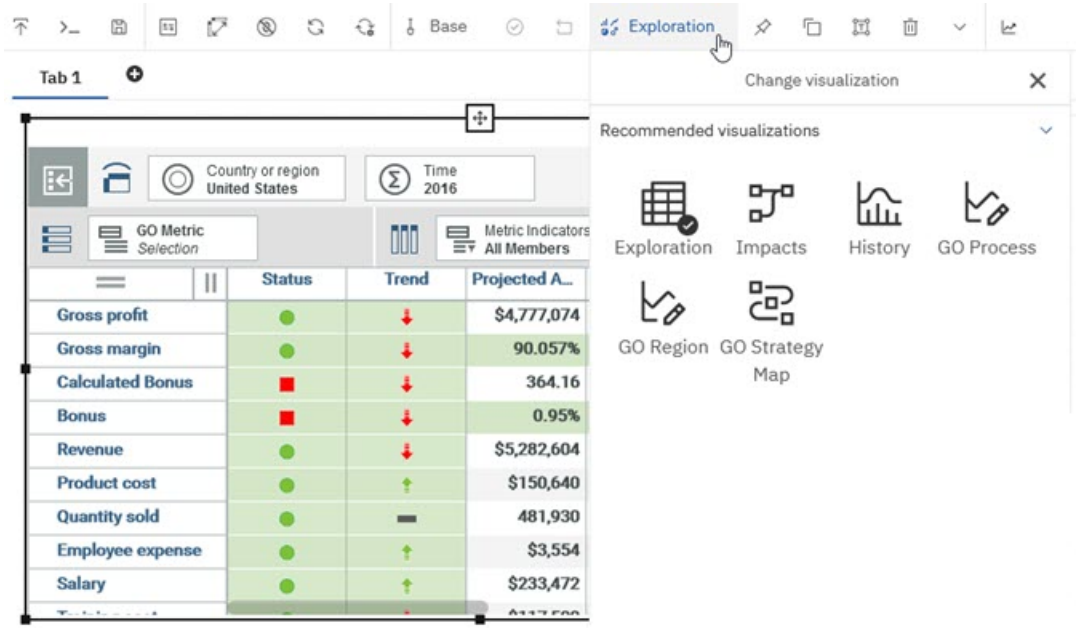
To successfully reference multiple databases in a websheet:

- Database names must be static; computed database names are not supported.
- All databases must be configured to use the same authentication mode.
- Users must have common credentials across databases.

You can learn more about websheets in the Websheets overview.

Use scorecards to track objectives

If a view is configured to support scorecarding, you can now select from five scorecards to view data and track the progress of your organization.



To display a scorecard, click the **Change visualization** button and pick one of the following scorecards types:

Impacts
Illustrates the positive and negative relationships between the metrics in your metrics cube. This type of diagram shows how the business works by displaying how one metric influences another.

History
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.

Process
Shows metrics in the context of a process flow.

Region
Shows performance across geographies on a map overlay.

Strategy Map
Tracks business performance by perspectives, objectives, and metrics.

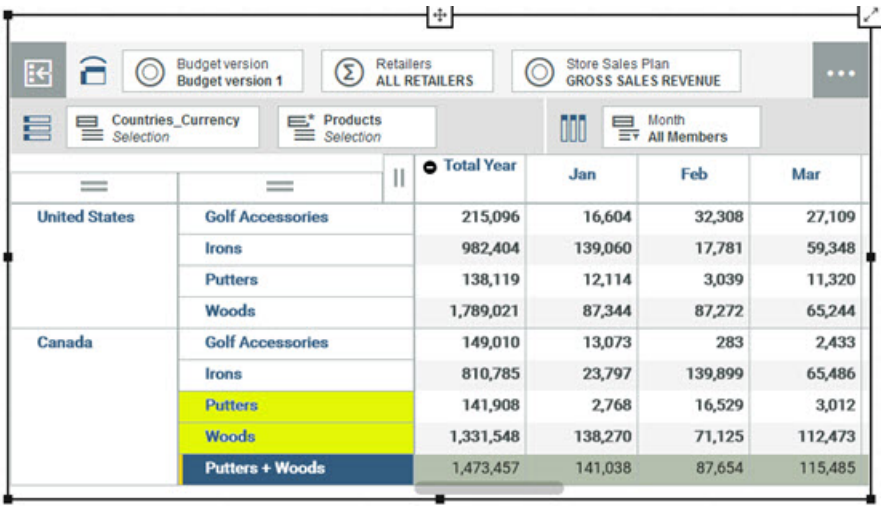
To learn more about scorecards, see Explore scorecards.

Create asymmetric calculations on stacked rows or columns in an exploration

You can now create calculations that apply to a single nested dimension set on rows or columns in a view. Because these calculations are applied to a single nested set for a given dimension and are *not* common to all nested sets for the dimension, they are called *asymmetric calculations*.

Asymmetric calculations can be confined within a single nested set or span multiple nested sets of the same dimension.

In this example, which is confined within a single nested set, you can see the **Putters+Woods** asymmetric calculation in the Products set. It calculates the total of Putters and Woods in Canada. Note that the calculation appears just once; it is not duplicated in both nested Products sets.



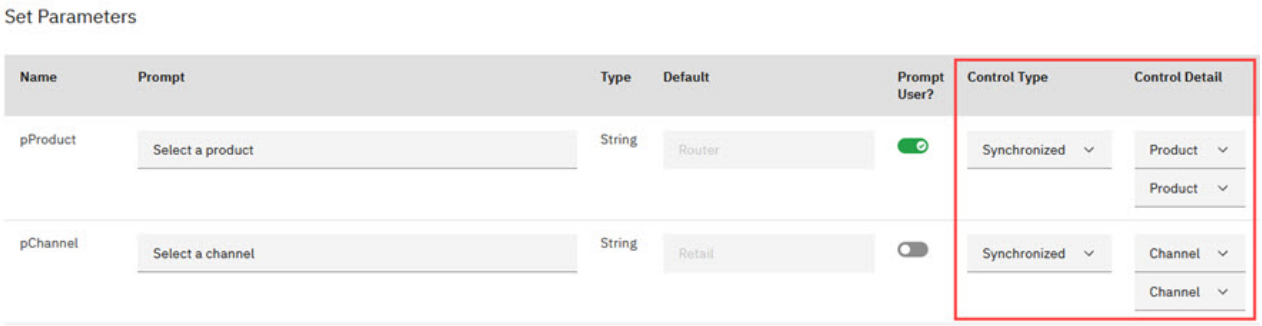
This example shows the **Golf Accessories + Putters** asymmetric calculation, which spans multiple nested sets of the Product dimension. It calculates the total of Golf Accessories in the United States plus Putters in Canada. Though the calculation spans the nested Products set for both United States and Canada, it appears only in the nested Products sets for Canada.

For full details, see Add an asymmetric calculation to a view.

Synchronize parameters for an Action button that runs a TurboIntegrator process

You can now synchronize string parameters for a TuroIntegrator process that is executed from an Action button, so the process picks up parameter values from other synchronized objects in a book.

When setting a parameter for a process that is executed from an Action button, select the **Synchronized** Control Type and select the dimension and hierarchy to be synchronized under the Control Details column.



When a parameter is set to **Synchronized** and the **Prompt User?** option is enabled, the user is presented with an informational screen indicating the parameter values being used, but cannot change the parameter values.

A process can receive synchronized parameter values from any of the following items:

- cube view (exploration or visualization)
- websheet
- dimension selector
- synchronization tile

Work with values formatted as Percentage in the Cube Viewer

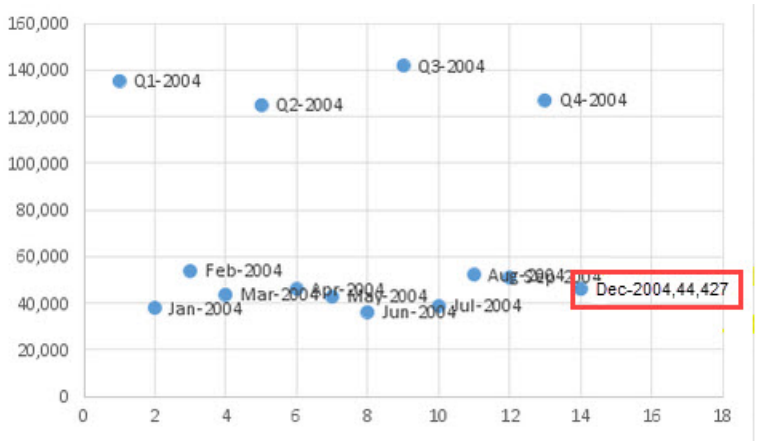
When you double-click a cell formatted as Percentage in the Cube Viewer, you now continue to see the value expressed as a percentage. In previous versions of Planning Analytics Workspace, double-clicking on a cell formatted as Percentage would display the underlying decimal value as stored in the Planning Analytics database.

Additionally, when you modify a value in a cell formatted as Percentage, you now always see the value you entered expressed as a percentage. In previous versions of Planning Analytics Workspace, when you entered a value in a cell formatted as Percentage while the **Defer on leaf data change** option was enabled, the value was displayed as decimal, and would be updated to percentage only after refreshing the view.

Known issue - Unexpected label in websheet Scatter Chart

This issue occurs when label text in a Scatter Chart is edited to use customized/hardcoded text.

Instead of displaying the customized label text, the label displays "[x-value], [y-value]". X value and y value are the values for the data point as set in the range of the chart.The highlighted label in this image illustrates the issue.



This issue will be corrected in an upcoming release.

2.0.61 - What's new, February 10, 2021

Learn about new features and known issues in version 2.0.61 of IBM Planning Analytics Workspace in the following topics.

Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

You can view the fix lists for this and previous versions of Planning Analytics Workspace at https://www.ibm.com/support/pages/ibm-planning-analytics-20-fix-lists#anchor2.

Create a TM1 database

Planning Analytics on Cloud customers can now create their own TM1 databases by using Planning Analytics Workspace **Administration**. You no longer need to submit a support ticket to have a TM1 database created for you.

You must use the Planning Analytics Workspace new interface, which is also referred to as New Experience, to create the database. You can even create a database while using the New Experience in Preview mode; there's no need to commit to a permanent upgrade! You can learn more about enabling the New Experience in Preview mode in this Knowledge Center topic: Manage the new experience for your users.

You cannot create a database in Planning Analytics on Cloud using the Planning Analytics Workspace Classic interface.

The database is created in the standard location. You can configure and manage the database just like any existing TM1 database. All users with the Planning Analytics Workspace Administrator role are given ADMIN access to the new database.

To rename or delete the TM1 database that you created, you still need to open a support ticket.

For more information, see Create a database.

Welcome Kit change for Planning Analytics on Cloud

The security mode 1 "admin" user name and password for each TM1 database are no longer included in the Welcome Kit for Planning Analytics on Cloud.

This change reduces the size of the Welcome Kit and eliminates the need to regenerate and distribute the kit after each request to create, rename, or delete a TM1 database.

When a database is created, a randomly generated password is set for the security mode 1 "admin" user name. If you need to use the admin user, administrators can set a new password by using the AssignClientPassword TM1 function.

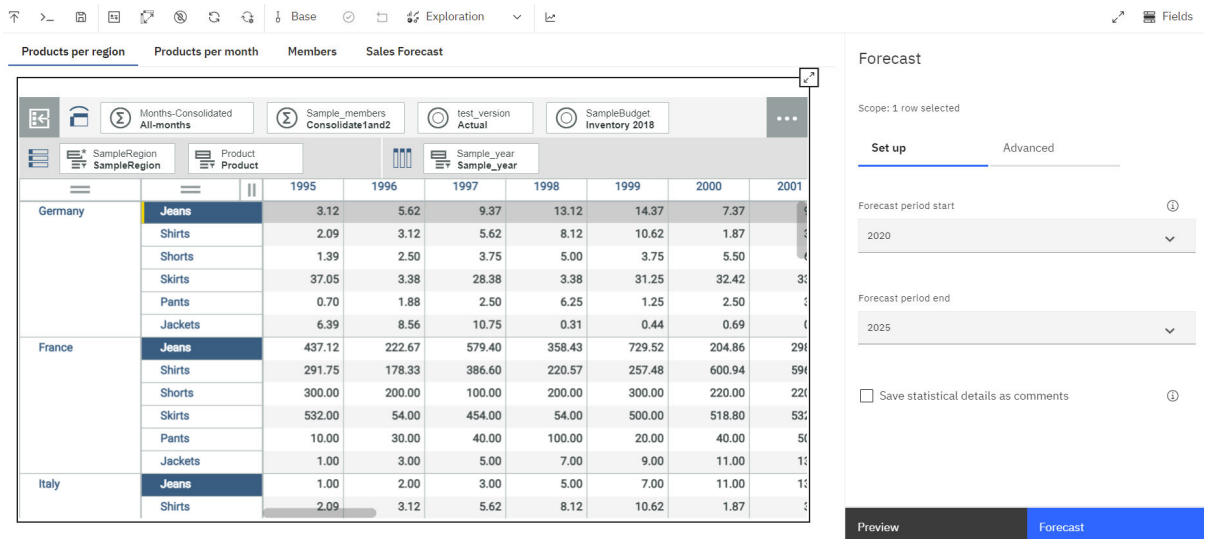
For more information, see The Welcome Kit.

Forecasting: preview nested dimension

Forecasting in IBM Planning Analytics Workspace allows previewing of nested members. And you can forecast by using cube view data.

Preview nested dimensions

As of SC61 Planning Analytics Workspace supports the preview of nested dimensions. Planning Analytics Workspace can now render a preview with nested dimensions. In the following case, jeans is selected for preview and **Preview** is enabled.



For complete details on using forecasting in Planning Analytics Workspace, including a complete tutorial, see Forecasting.

Sixty minute inactivity timeout for Planning Analytics Workspace on Cloud

A new inactivity timeout enhances security in Planning Analytics Workspace 2.0.61.

Currently, Planning Analytics Workspace on Cloud enforces a 24 hour session timeout. This session timeout disconnects a user 24 hours after their most recent login and requires the user to log back in to Planning Analytics Workspace. The session timeout is enforced regardless of user activity. If a user is active continuously, the session timeout is still triggered 24 hours after the most recent login.

In addition to this session timeout, Planning Analytics Workspace 2.0.61 introduces an inactivity timeout. When a user is inactive for 60 minutes, the user is logged out of Planning Analytics Workspace. This inactivity timeout is mandatory and applicable to all Planning Analytics Workspace on Cloud customers. The 60 minute inactivity interval is static and cannot be modified.

Planning Analytics Workspace will warn a user about an imminent timeout due to inactivity. If the user does not intervene, the inactivity timeout occurs 60 minutes after the most recent activity.

When an inactivity timeout does occur, what is the impact on the user?

- Workspace end user state will be lost.
- Authoring of Books and Plans/Applications that are not saved will be lost.

This new inactivity timeout is applicable only to Planning Analytics Workspace on Cloud, but also impacts Planning Analytics for Microsoft Excel.

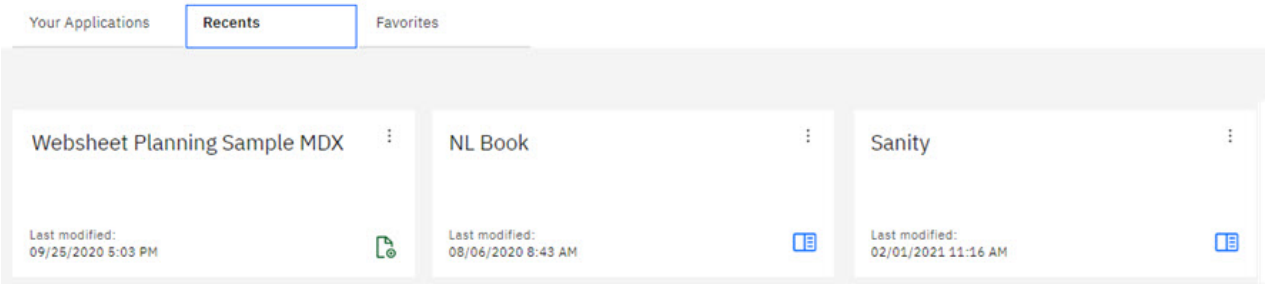
For more information on the inactivity timeout, see Connection timeouts in Planning Analytics Workspace on Cloud.

For details on configuring timeouts in Planning Analytics Workspace Local, see Configuring parameters for Planning Analytics Workspace Local.

For more information on how the inactivity timeout impacts Planning Analytics for Microsoft Excel, see Timeouts in IBM Planning Analytics for Microsoft Excel

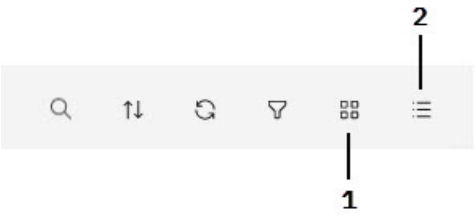
View assets as tiles

Recents and **Favorites** on the Home page are now displayed as tiles.



You also now have the option to view assets on the **Applications and Plans** page and the **Reports and Analysis** page as tiles or as a list.

Click the appropriate button at the top of the page to change how assets are displayed.



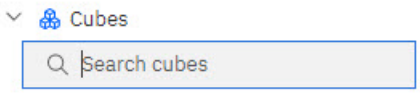
1
Tile view

2
List view

Search at the node level in the data tree

To make it easier to locate an object within a long list of items in the data tree, you can now search at the node level in the tree.

When you expand the Cubes, Dimensions, Sets, Processes, Chores, or Control Objects:Cubes nodes in the data tree, you'll see a search box immediately below the node name. For example, here's what the search box looks like under the Cubes node.

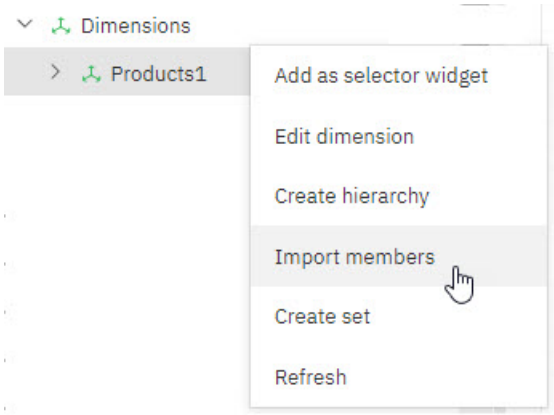


Start typing in the box to see the objects that contain your search string. The results are updated continuously as you enter characters.

Import dimension members from the data tree

You can now right-click a dimension in the data tree and click **Import members** to initiate an import.

You no longer need to have the dimension open in a book to start importing members.



Reset a sandbox

You can now reset data in a sandbox with a single click.

Click the **Sandbox discard** button to discard all data changes since your last commit action.

2.0.60 - What's new, January 12, 2021

Learn about new features and known issues in version 2.0.60 of IBM Planning Analytics Workspace in the following topics.

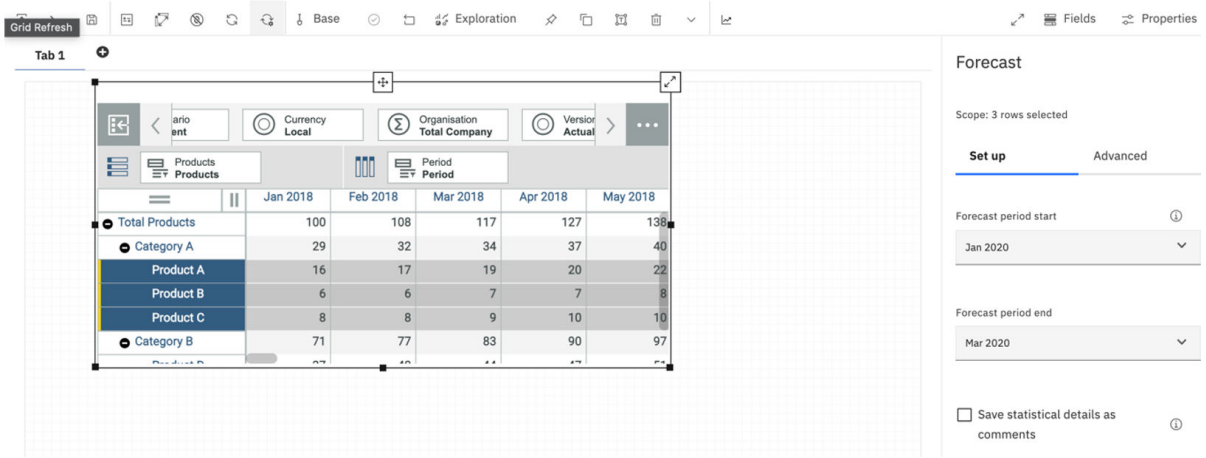
Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

Forecasting: preview more than one row and forecast by using cube view data

Forecasting in IBM Planning Analytics Workspace allows previewing based on up to 25 rows. And you can forecast by using cube view data.

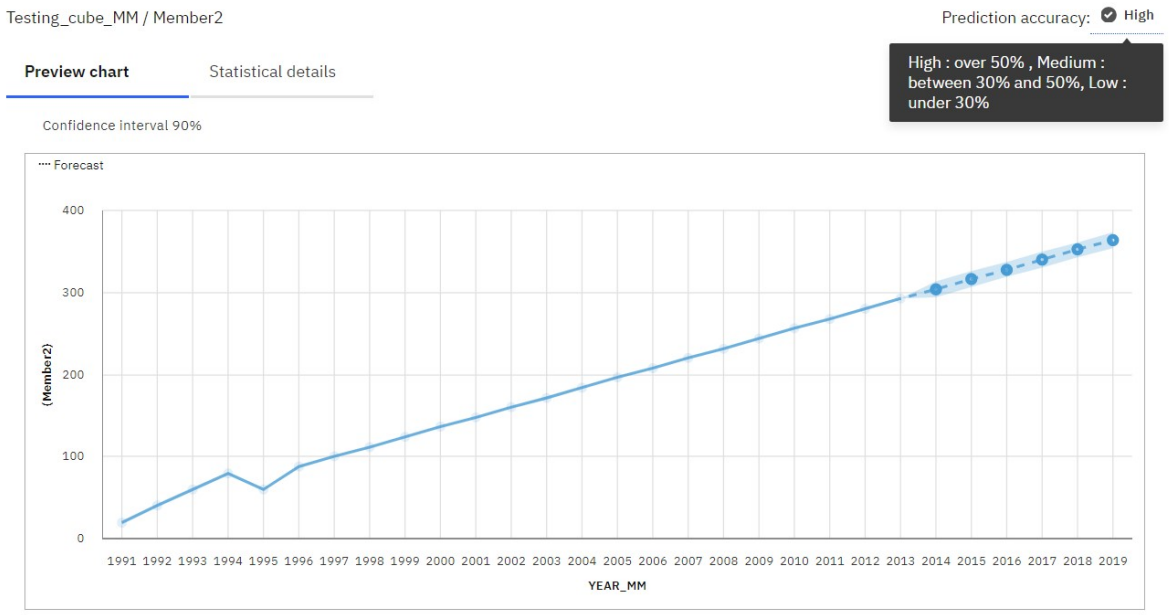
Preview more than one row

We now support the preview of up to 25 rows. In the following case, three rows are selected for preview and **Preview** is enabled.



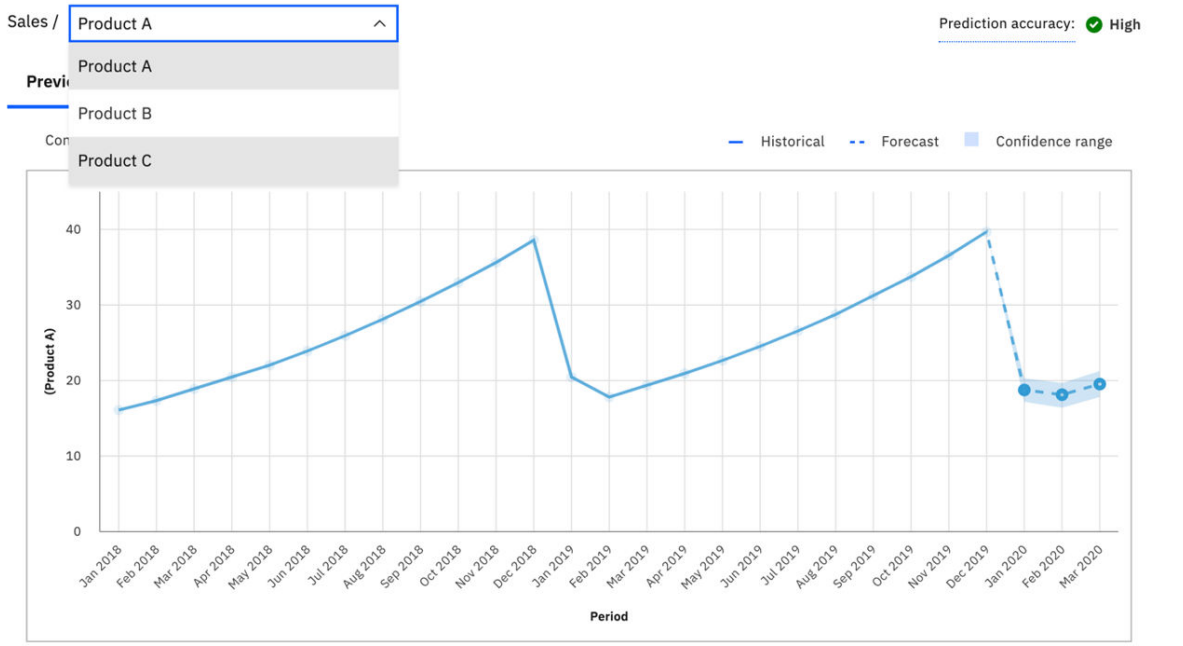
Before SC60

Forecast preview



As of SC60

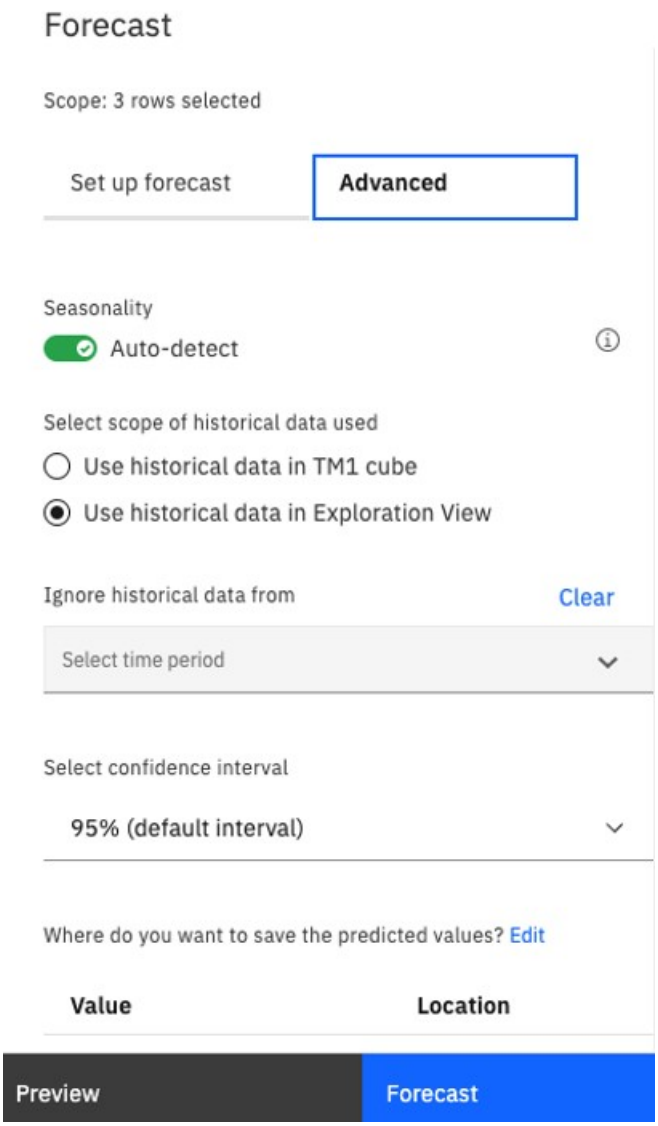
Forecast preview



For more information, see Previewing more than one row.

Forecast by using cube view data

Initially, when the forecast preview is run, the data in TM1 is used as the historical data regardless of what is presented in the cube view. The reason for that was to include more history in the prediction, which results in higher accuracy. In SC60, a new option is added that allows you to choose whether to use the data in TM1 or the current cube view as the history.



In the **Advanced** tab in the **Forecast** window, you can select two options **Use historical data in TM1 cube** and **Use historical data in Exploration View**. The default is **Use historical data in Exploration View**.

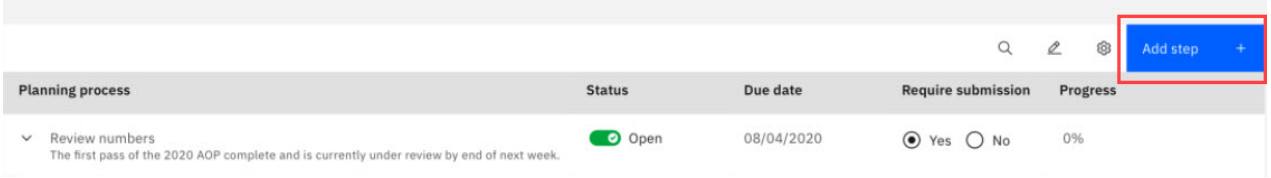
For more information, see Forecasting options.

For complete details on using forecasting in Planning Analytics Workspace, including a complete tutorial, see Forecasting.

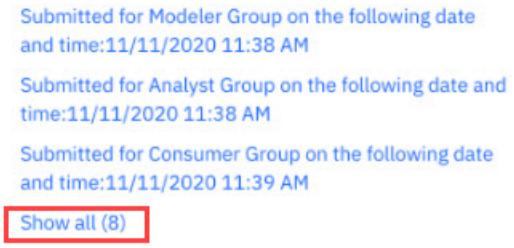
Applications and Plans UI enhancements

The user interface for Applications and Plans has been updated to simplify administration.

The text link to Add a step (for plans) and Add a section (for applications) has been moved from the bottom of the plan/application grid and converted to a button at the top of the grid. This example shows the change in a plan, but you'll see the same change (with a different button label) for applications.



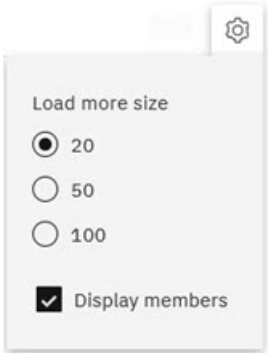
Additionally, the plan contribution panel has been modified to show only the first three submissions for a step. You can click **Show all** to reveal all the submissions.



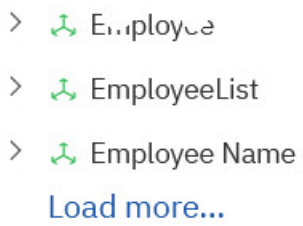
After reviewing the submissions, you can click **Show less** to collapse the list and show just the first three submissions.

New data tree Settings menu

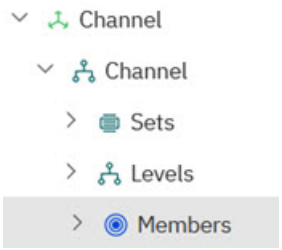
A new Settings menu lets you manage the behavior of the data tree.



You can specify a **Load more size** value to determine how many items of any object type are displayed in the data tree before you have to click **Load more** to retrieve and display more items. For example, here you can see a list of dimensions where the **Load more** option is enabled because the number or dimensions exceeds the specified **Load more size** value.



You can also use the **Display members** option to determine if the Members node appears in the data tree under dimension hierarchies. When the option is enabled, the Members node is available, as in this example.



When the option is disabled, the Members node is not available in the data tree.

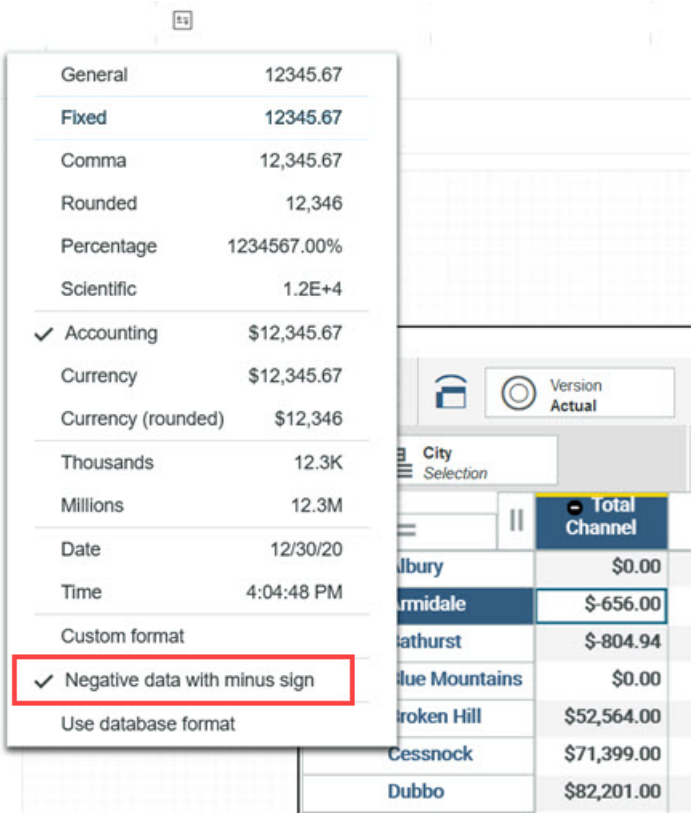
Prefix negative values with a minus sign

When defining a display format for an entire view, a single row, a single column, or a cell widget, you can set the format to display negative values with a minus sign, rather than enclosed in parentheses.

The **Negative data with minus sign** option is available when you select any of the following formats:

- Comma
- Rounded
- Accounting
- Currency
- Currency (Rounded)
- Thousands
- Millions

This example shows the **Negative data with minus sign** option applied to the Accounting format and visible in a cube view.



Delete a folder for a removed user

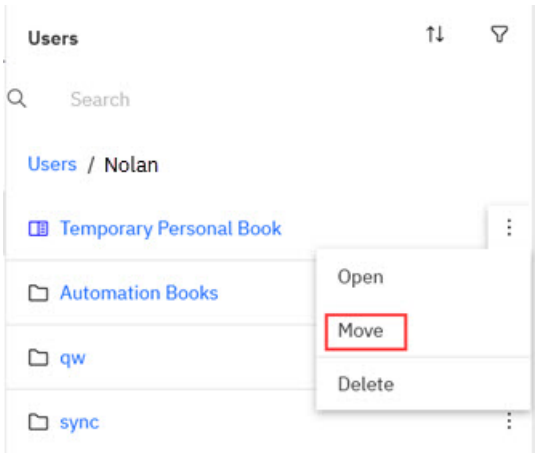
Previously, when a user was removed from Planning Analytics Workspace, the user's personal folder was renamed to Unknown and the folder could not be deleted by an administrator.

Administrators can now delete the Unknown folder associated with any deleted user.

Move assets or folders in a user's personal folder

A **Move** option is now available for all assets and folders within a user's personal folder. A user or administrator can use this option to move an asset or folder to a new location, either in the Shared folder or a different place in the user's personal folder.

When you click the **Options** menu next to any asset or folder within a user's personal folder, you'll see the new **Move** option.



When you click the **Move** option, you can select a destination folder for the asset or folder. The destination can be in the Shared folder or in the user's personal folder. If you move to the Shared folder, you are prompted to set user/group permissions to the asset or folder.

2.0.59 - What's new, November 17, 2020

Learn about new features and known issues in version 2.0.59 of IBM Planning Analytics Workspace in the following topics.

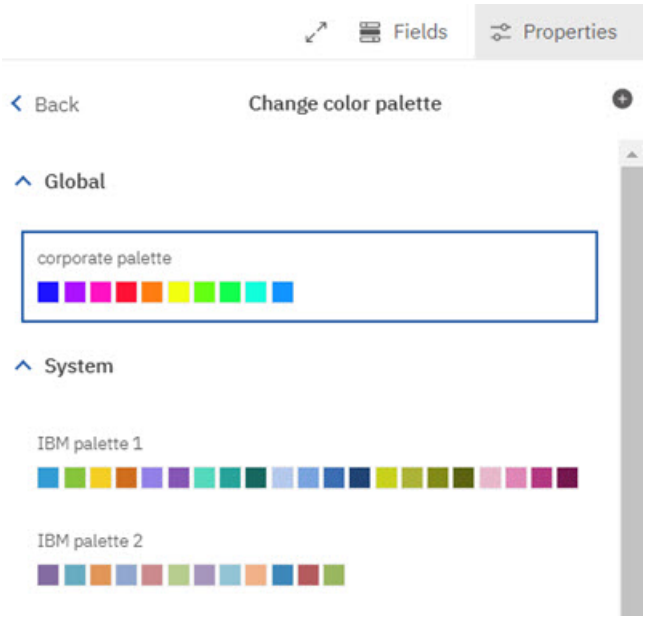
Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

Create a global color palette

Administrators can create global color palettes that can be applied to books and visualizations in Planning Analytics Workspace.

Procedure

1. Click the **Administration** tile on the Planning Analytics Workspace Home page.
2. Click the **Excel and Customizations** tile.
3. Click the **Palettes** tab.
4. Click **Add global palette** +.

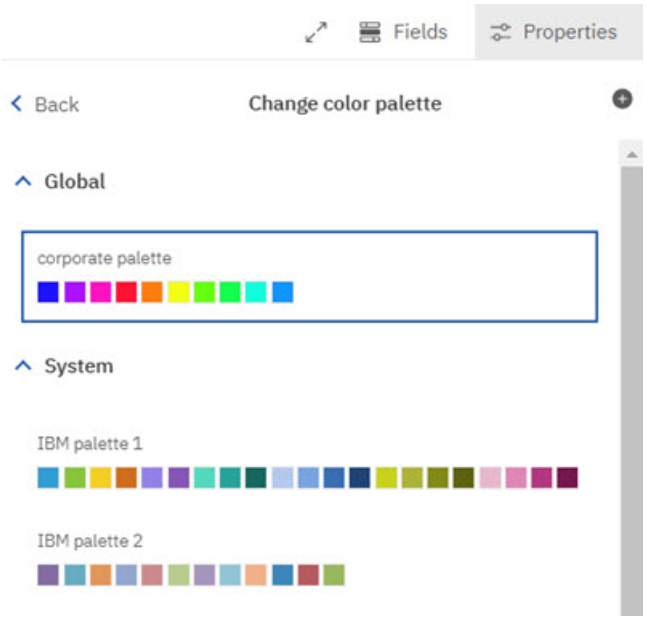


You can create the following types of color palettes:

Categorical
Used for visualizations that support discrete colors, like a bar or pie visualization.

Continuous
Used for visualizations that support color transitions, like a map or a heat map visualization.

After the global color palette is saved, users can apply the palette from the Global color palette properties.



For complete details on creating a global palette in Planning Analytics Workspace, see Create a global color palette.

Support for iPad

The Planning Analytics Workspace new experience is now supported on iPad.

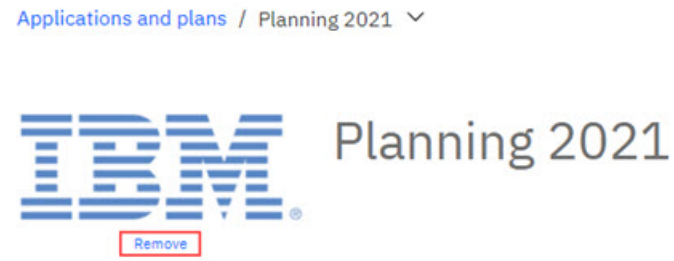
For details on mobile device capabilities and performance considerations, see Accessing Planning Analytics Workspace from Apple iPad.

Usability enhancements

This release includes several usability enhancements.

Remove a logo from an application or plan

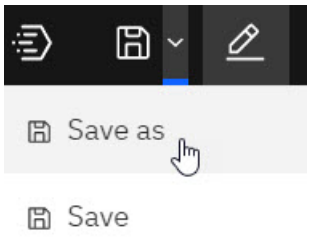
You can now delete a logo from an application or plan by clicking the **Remove** option directly beneath the logo.



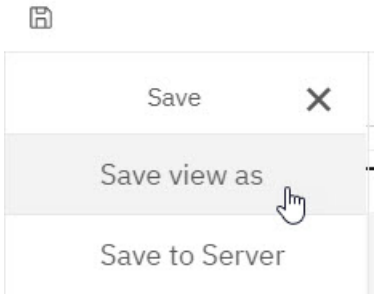
Delete option for logo

'Save as' defaults to current folder for books and views

If a book has previously been saved, then the folder where the book exists is the default folder when you choose **Save** > **Save as**.

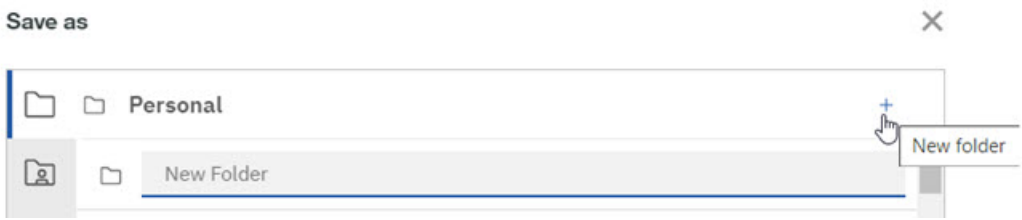


Similarly, if a view has previously been saved, then the folder where the view exists is the default folder when you choose **Save** > **Save view as**.



Create a new folder when saving a book or view

When saving a book or view, you can now create a new folder to accept the book or view. You can create a new folder in the Shared folder, in your personal folder, or in any sub-folder of your personal folder. To create a new folder, click the New folder icon on the parent folder where you want to insert the new folder, then assign a name for the folder and click Save.



Planning Analytics for Microsoft Excel: login or server access may fail in new experience

This issue may occur only when authenticating against a local TM1 database in the Planning Analytics new experience. You will not encounter this issue when authenticating against a local database in Planning Analytics classic or any Planning Analytics on Cloud database.

When attempting to log in to a TM1 database from Planning Analytics for Microsoft Excel, you may receive the following error under certain configurations or conditions: `Cannot load the requested view`.

To work around this issue, you can dismiss the error and again select the desired TM1 database and continue to log in with a valid user name.

This issue will be corrected in an upcoming release.

2.0.58 - What's new, October 21, 2020

Planning Analytics Workspace 2.0.58 SC is a cloud release that includes significant changes in the look and feel of Planning Analytics Workspace, as well as important new functionality.

Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

Learn from the experts

There are a lot of big changes in the Planning Analytics Workspace new experience, introduced in 2.0.57 local and 2.0.58 cloud. From a completely revised interface to significant new features like forecasting, the best place to learn about these changes is from the detailed blogs created by our subject matter experts.

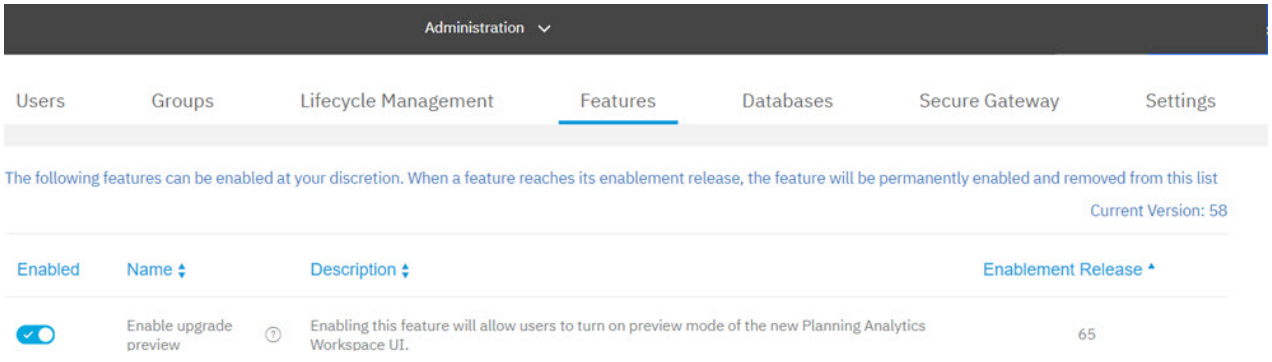
Click here to visit the central blog about Planning Analytics Workspace enhancements and new capabilities. From this central blog, you'll find links to other blog posts and additional information from a range of Planning Analytics Workspace pros.

Manage the new experience for your users

To make the move to the new interface more manageable, Planning Analytics Workspace administrators can manage when a new experience preview is exposed to their users and when a permanent upgrade to the new experience is executed.

Enable the preview

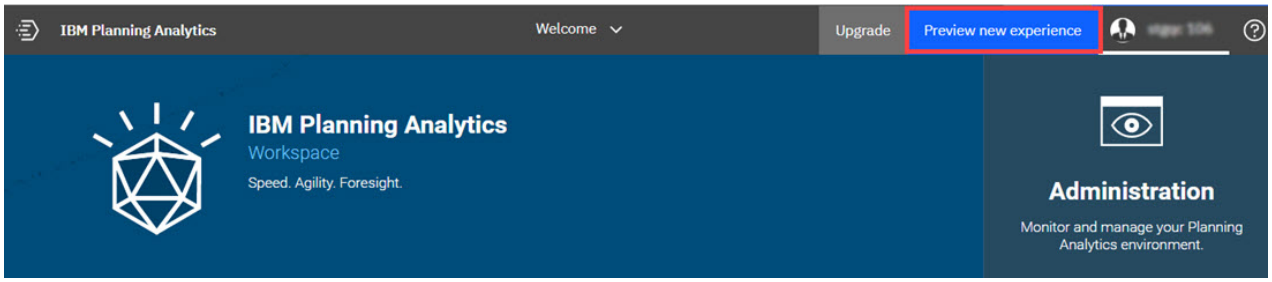
To make a new experience preview available for your users, enable the **Enable upgrade preview** feature on the Features administration tab.



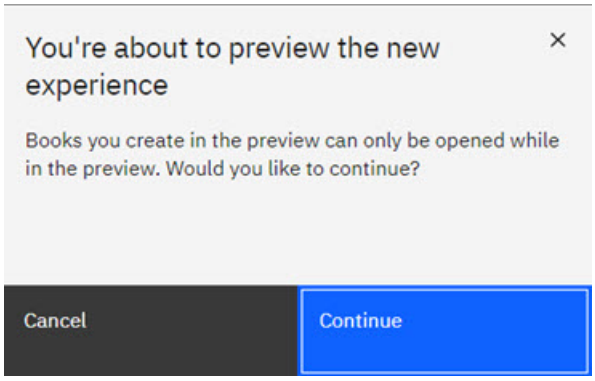
As with all features that are subject to administrator enablement, the feature is enabled by default. If you don't want the new experience preview to be available to your users, disable the feature. Note that disabling the feature also removes the Upgrade option for administrators.

See Manage features on IBM Knowledge Center for full details on using the Features administration tab.

When the feature is enabled, all users see a **Preview new experience** button on the Planning Analytics Workspace banner. (Note that the adjacent **Upgrade** button is visible only to administrators. We'll discuss that further in a moment.)



You can click the button to experiment with the new experience. When you click the button, you'll be asked for confirmation. Click **Continue** to proceed to the new experience preview.



While using the new experience preview, all users should be aware of these considerations:

- You can return to the classic Planning Analytics Workspace interface at any time by clicking the **Return to Classic Experience** button on the banner.
- Books created in the classic experience can be opened in the new experience. When you open a book that was created in Planning Analytics Workspace Classic, a message appears saying "Your Dashboard has been upgraded. Save now to maintain optimum performance."
- When you open a book that was created in Planning Analytics Workspace Classic, you should use Save As and save the book to a new name or location in order to create a copy of the classic book and take advantage of the features in the new experience. In this scenario, the original book is still visible in the classic experience and the copy is available in the new experience, making it easy to compare and validate your assets.
- Any books saved in the new experience cannot be viewed in the classic experience. If you attempt to open such a book, you'll receive an error message. Views saved to the content store in the new experience cannot be opened in Planning Analytics for Microsoft Excel.

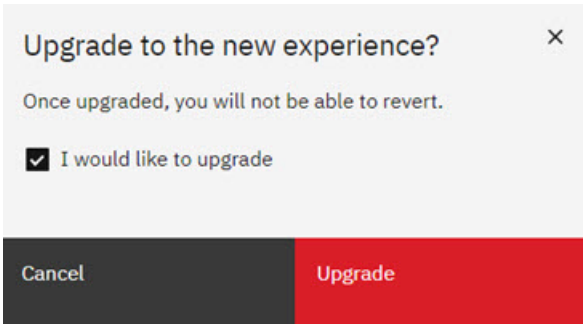
Perform a permanent upgrade to the new experience

Once all your users are comfortable with the new interface, have validated their current assets, and are ready to adopt the change, an Administrator can perform a permanent upgrade to the new experience.

Note: Remember there is no way to undo an upgrade, so please be sure to complete all of your testing before proceeding with a permanent upgrade to the new Planning Analytics Workspace experience. To ensure consistency and a smooth upgrade, we recommend that you preview and upgrade first in a non-production environment, then in a test environment (if applicable), and finally in your production environment.

To perform the upgrade, click the **Upgrade** button on the Planning Analytics Workspace Classic banner.

To avoid an accidental upgrade, you'll be prompted for confirmation. Select the **I would like to upgrade** option, then click **Upgrade**.



After the upgrade is complete, the **Preview** and **Upgrade** buttons will no longer be visible and all future logins take all users directly to the new experience.

After upgrading, users must open and save any existing books before they can take advantage of the enhancements available in the new experience.

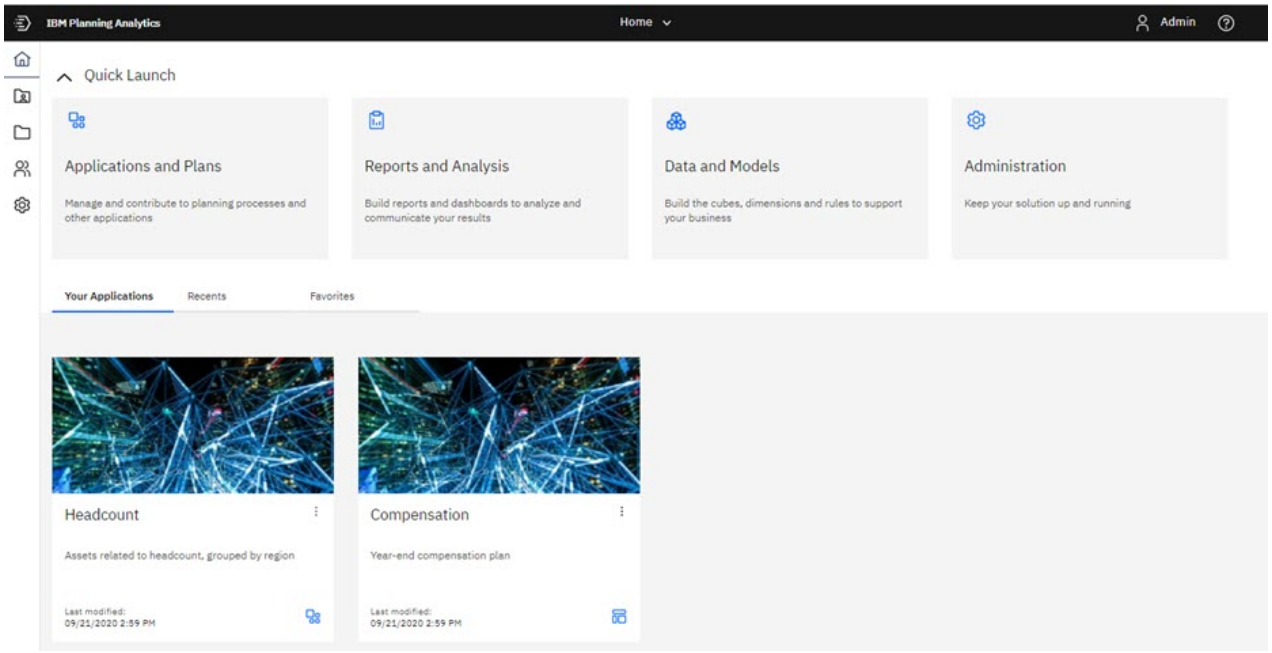
Improved look and feel

The Planning Analytics Workspace user interface has been updated to make it easier to accomplish tasks, provide a more consistent experience with other IBM products, and to simplify the transition between Planning Analytics Workspace and Cognos Analytics.

As part of the interface update, new icons adhering to the Carbon Design principles have been introduced throughout Planning Analytics Workspace. For more information about Carbon Design principles, see https://www.carbondesignsystem.com.

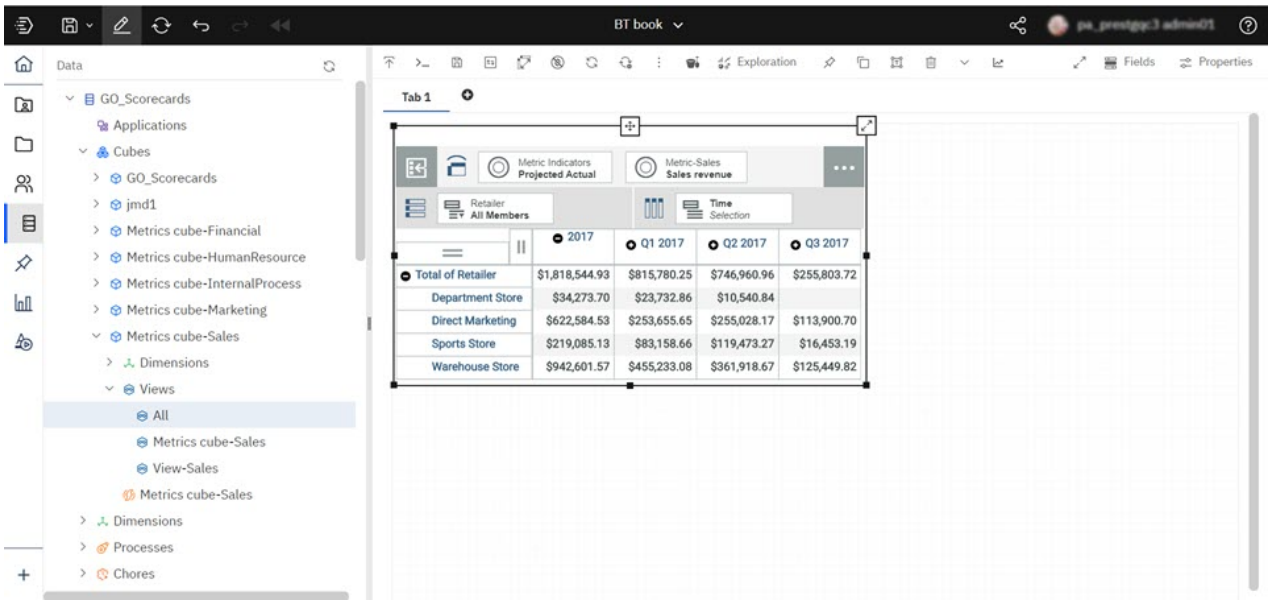
Note: Because the interface that exists in versions of Planning Analytics Workspace prior to 2.0.57 SC is still supported, it is necessary to differentiate between the new interface and the 'old' interface in the documentation. When there is a divergence of procedures or capabilities between the current (new) interface and the old, the documentation describes the current interface as Planning Analytics Workspace and describes the interface in 2.0.55 SC and prior versions as Planning Analytics Workspace Classic.

A new **Home** page for Planning Analytics Workspace is the first significant changes you'll notice. On the new **Home** page, you can quickly access the area you want to work in, customized for your role within Planning Analytics Workspace. You can also quickly open your applications and plans, as well as your recent and favorite items.



The prominent Quick Launch tiles that provide immediate access to **Applications and Plans**, **Reports and Analysis**, **Data and Models**, and **Administration** are dynamically displayed depending upon your role when you log in to Planning Analytics Workspace. Only the tiles that you can use based on your role appear. For example, an administrator sees all of the Quick Launch tiles, while an analyst sees only **Applications and Plans** and **Reports and Analysis**. You can click the Quick Launch show/hide button Quick Launch to show or hide the Quick Launch tiles. When you hide the tiles, you can see more of your applications, recent items, or favorite items.

You'll also notice improvements in other familiar places. For example, in books the user interface is simplified, new icons are present, and the toolbar has been decoupled from the view.

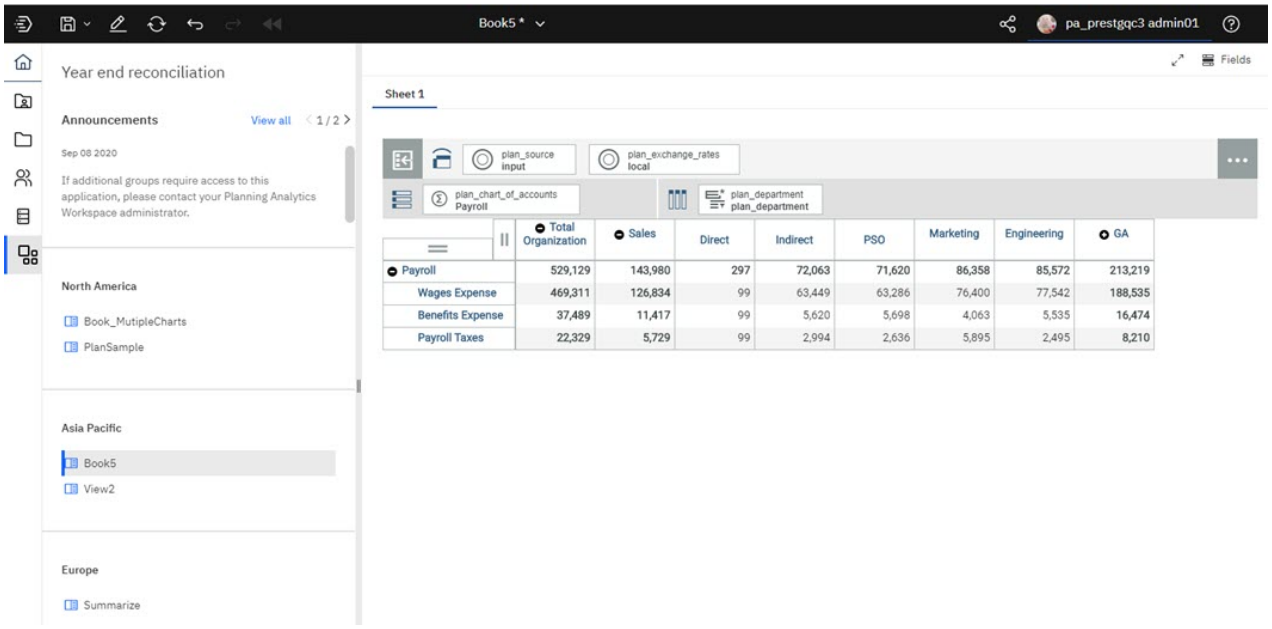


Use of the new interface is described in the relevant topics throughout the Planning Analytics Workspace help and documentation.

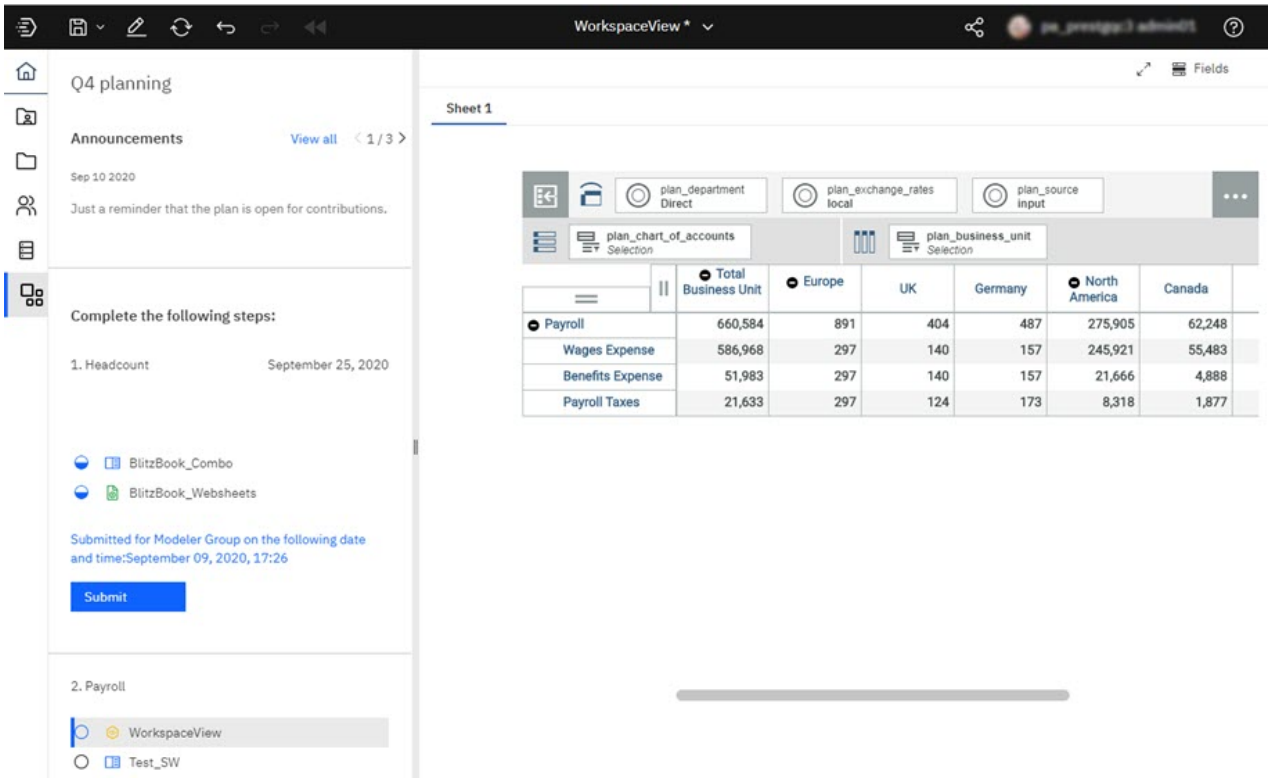
Applications and Plans

Applications and plans let you organize logically related Planning Analytics Workspace assets such as books, view, and websheets in containers.

An application contains related assets that are grouped in sections. These sections might reflect the structure of your organization, planning and budgeting requirements, or any other relevant grouping of assets. While an application contains logically related assets, there are no implied or required actions associated with the assets or sections in an application. An individual asset can belong to more than one application.



A plan contains assets that are grouped in steps. These steps can represent discrete tasks or contributions that must be completed in a planning or budgeting process. While steps can be ordered in a plan, there is no requirement for contributors to complete the steps sequentially; they can be completed in any order. Steps can also be assigned a due date for contributions. An administrator can require that steps be explicitly submitted for approval, and an administrator can reject and reset a submission.

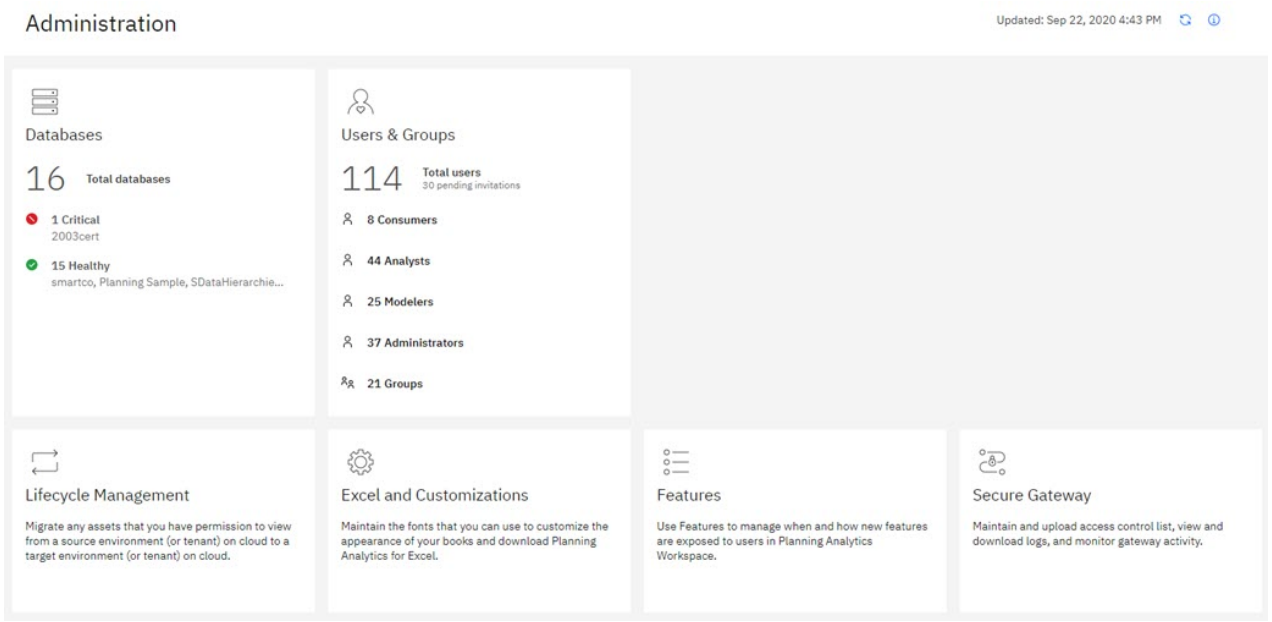


For complete details on creating, managing, and using applications and plans, see Applications and plans.

Administration page changes

The Planning Analytics Workspace **Administration** page has been reorganized to provide greater insight into your environment and to simplify access to administrative tasks.

The Administration page now includes several task-specific tiles. The Databases tile provide quick insight into the health of your databases. The Users and Groups tile lets you know how many users are assigned to each role and the number of groups that are defined.



You can click any tile to perform the administrative tasks associated with the tile.

The tiles available on the **Administration** page vary depending on whether you are running Planning Analytics Workspace Local or on Cloud. The Agents tile is available only on Local, while the Secure Gateway tile is available only on Cloud.

For complete details on using the new Administration page, see Administer Planning Analytics Workspace.

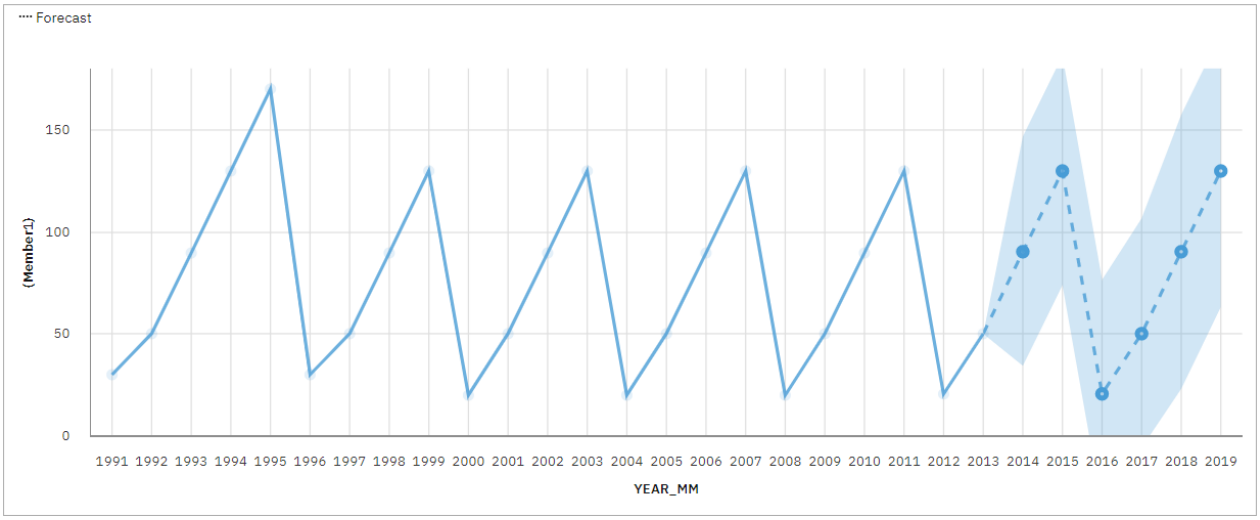
Forecasting

You can now use forecasting in IBM Planning Analytics Workspace to discover and model trend, seasonality, and time dependence in data.

You can forecast in Planning Analytics Workspace by using automated tools that model time-dependent data. Automated model selection and tuning makes forecasting easy to use, even if you are not familiar with time series modeling.

Forecasts and their confidence bounds are displayed in visualizations as a continuation of historic data. You can also view the statistical details for generated models if you want to see the technical background.

The following example shows forecasting values and confidence bounds in a line visualization.



Specifying time series in forecasts often requires data manipulation. Planning Analytics Workspace supports a wide range of time series without the need for manipulation, ranging from standard date and time types, to nested periodic and cyclical time fields. When data is recognized as a time series, data preparation is automated. Appropriate trend and seasonal periods are detected, and models are selected from a set of nine different model types.

You can forecast in line, bar, and column visualizations. Forecasting allows analysis of hundreds of time series per visualization. Forecasts and confidence bounds are computed for each time series, and displayed in the visualization as extensions of the current data. You can inspect each time series separately, and tailor the forecast and results to your own data and requirements.

If you are familiar with forecasting models, you can view the selected model type, estimated model parameters, standard accuracy measures, and processing summary information.

For complete details on using forecasting in Planning Analytics Workspace, including a complete tutorial, see Forecasting.

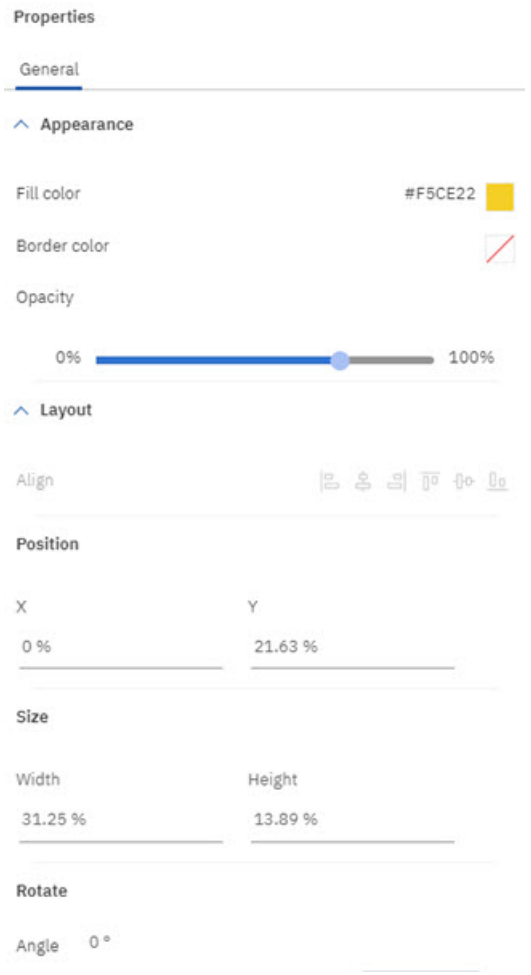
Book and visualization improvements

The properties available to manage all aspects of your books have been significantly expanded. The visualization types available to use in Planning Analytics Workspace have been updated to provide more and improved visualizations.

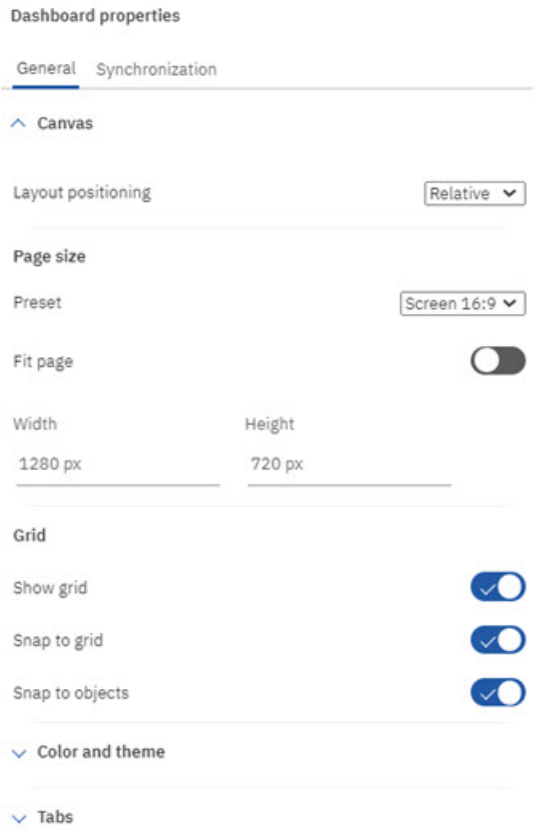
Books

All objects in a book, such as explorations, visualizations, buttons, images, and text, can now be precisely managed using an expanded selection of properties.

When you select an object in a book and then click the **Properties** tab, you'll see an expanded list of properties that you can set to manage the object in your book. The properties available vary by object type, and the properties you're familiar with are still available, but new properties allow you to precisely manage the size, position, alignment, and appearance of all objects in a book.



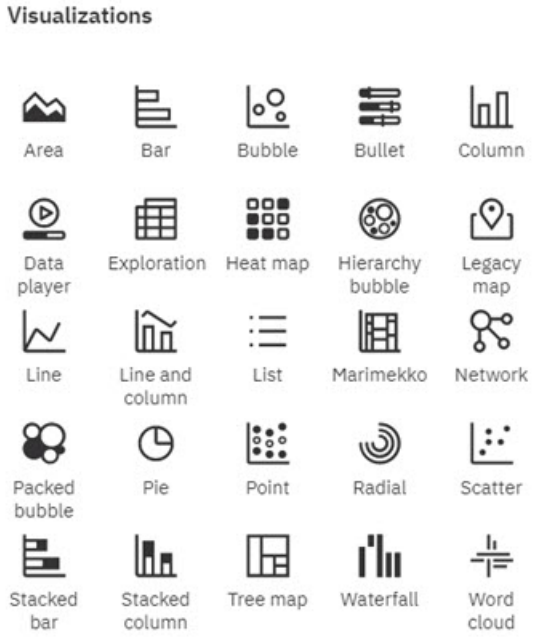
You can also set Dashboard properties to manage the general appearance of your book.



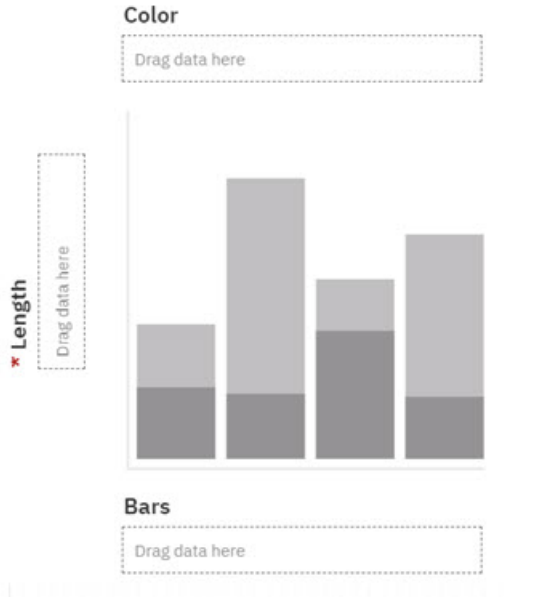
Details on using these properties are provided in the individual topics that describe how to build and manage books. For more information, see Work in books and views.

Visualizations

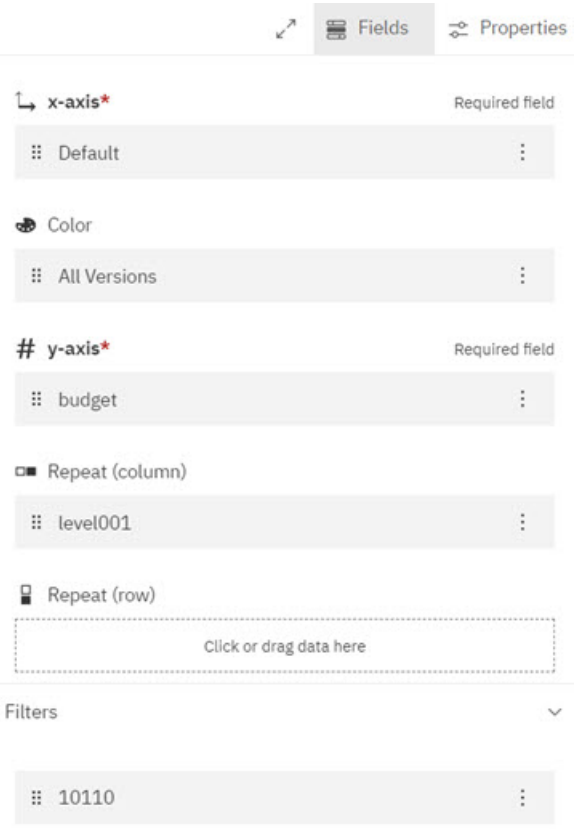
The list of visualizations available in Planning Analytics Workspace has been expanded to include twenty five options.



Explorations can be changed to visualizations in the same way you've always done it, but you can also place an empty visualization onto a book and use drop zones to build the visualization.



You can drag and drop dimensions from the Data tree onto the **Drag data here** drop zones to build a visualization from scratch. Once the visualization is complete, you can manage the visualization using the Fields tab on a book. You can drag and drop dimensions to different fields to change the structure of your visualization or you can click a field to select a new member to use in your visualization.

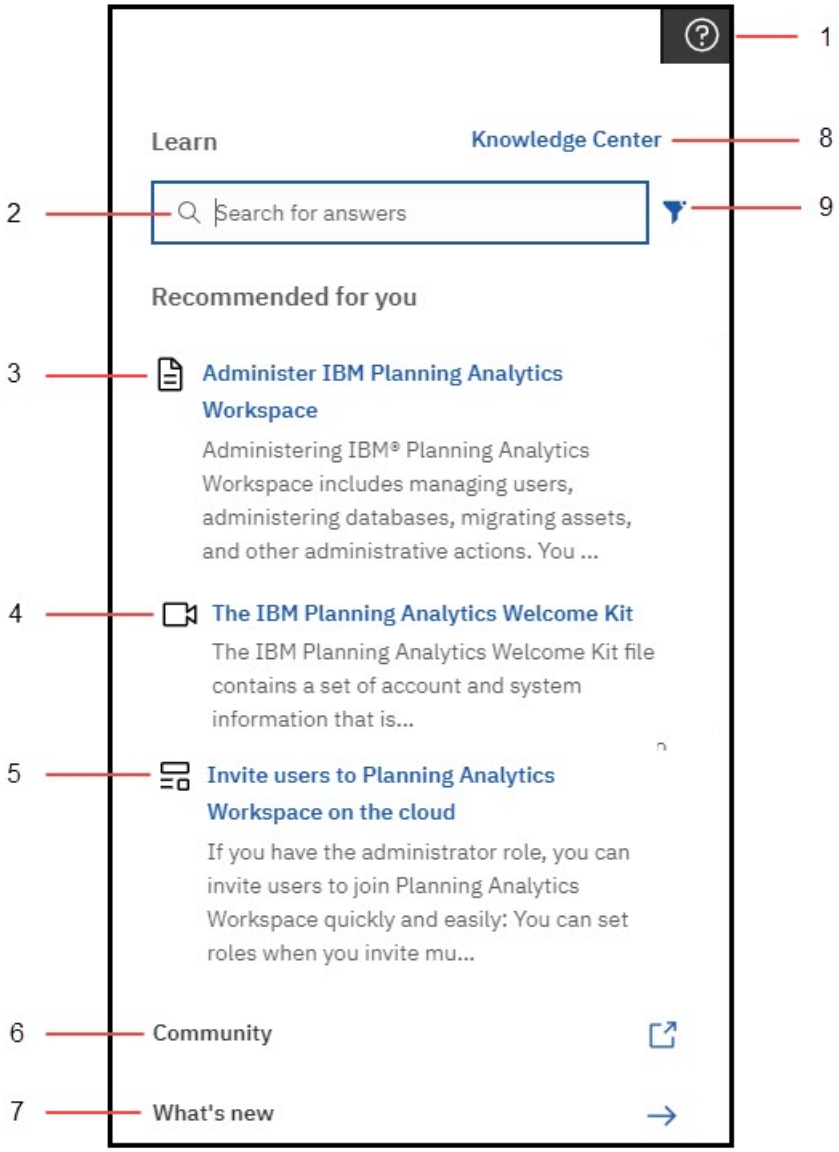


For further details, see Visualizations.

Ask for help in the cognitive Learn pane

If you want to learn more about how to use Planning Analytics Workspace, click the Help icon and ask a question. The cognitive help tailors your help experience based on where you are working in the product and finds only the answers that are relevant to your user role. You can find the latest videos, blogs, and documentation.

Use these features on the Learn pane to find answers and be more productive!



1

Click the Help icon to open the Learn pane (it remembers where you were the last time you opened it). Click anywhere to close it. The Learn pane recommends content that relates to your task and finds similar content that you might also like. And, it is always learning! When you search and find answers, you are training the Learn pane and those answers influence future recommendations.

2

Type a question in the Search box. You can search in any supported language in the Learn pane and you see translated documentation in your search results. You also see blogs and videos that match your search, however, blogs and videos aren't translated.

3

Read the formal product documentation, sourced from IBM Knowledge Center.

4. Watch a video! Sometimes the best way to learn is to see it in action.
5. Read a post in the Planning Analytics Community Blog The community blog posts are written by experts who use Planning Analytics Workspace and share their tips and tricks.
6. Go to the Planning Analytics Community. In the community, you can find the latest articles, blog posts, and events. You can also start and contribute to discussions about Planning Analytics.
7. Click **What's New** to find out what is new in the latest release of Planning Analytics Workspace.
8. Visit the IBM Knowledge Center for all IBM Planning Analytics documentation In the IBM Knowledge Center, you can read all documentation, including related products.
9. Filter your search results to show only your preferred content type: videos, blogs, or documentation.

Considerations for upgrading to Planning Analytics Workspace new experience

Users should be aware of the following considerations before upgrading to the new experience in Planning Analytics Workspace 2.0.57 SC local and 2.0.58 cloud.

The upgrade to Planning Analytics Workspace 2.0.57 SC local is a permanent upgrade. There is no way to revert to a prior version of Planning Analytics Workspace Classic.

likewise, when an administrator commits to an upgrade in 2.0.58 cloud, there is no way to revert to the 'classic' user experience.

Features not supported in initial 2.0.57 local/2.0.58 cloud releases

These features are not supported in the initial new experience Planning Analytics Workspace release. Support for these features may be reintroduced in subsequent releases.

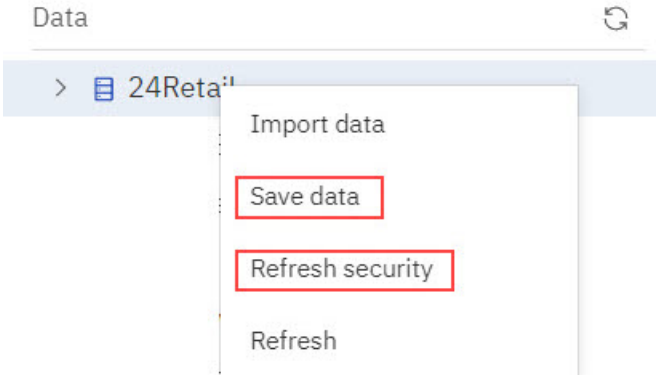
- Tree map visualizations upgrade successfully *except* when more than one dimension is present on an axis, in which case the tree map is converted to an Exploration during book upgrade.
- The Reports and Analysis landing page does not display individual tiles for books, views, or websheets. Rather, the Reports and Analysis landing page displays a searchable and sortable list of all assets.
- Mobile devices are not fully supported in the initial new experience release, as some gestures are not yet implemented.
- An Administrator cannot set up a global color palette. (This capability is supported as of Planning Analytics Workspace 2.0.59.)
- When you click **Share** > **Export**, you cannot share a book or view as an image or PowerPoint document. You can, however, export as PDF with enhanced print options.
- The Intent bar (sometimes called the NLP bar) is not available in this release.

Differences in behavior between Planning Analytics Workspace 2.0.57 local/2.0.58 cloud and Planning Analytics Workspace Classic

- Chats are deprecated, as previously announced in this deprecation notice.
- Bookmarks and history are no longer available on the Data tree. Instead, you can use the Recents or Favorites tabs on the Planning Analytics Workspace Home page to open assets that you have recently viewed or favorited.
- Collections has been changed to Pins. You can pin a view or websheet from a book. You can access pinned items from the Pin button while in Edit mode.

Database administration enhancements

You can now save data and refresh security for a selected database directly from the Data tree.



Save data

To save all data for a database from memory to disc, right-click the database in the Data tree, then click **Save data**. This action also restarts the `tm1s.log` file for the database.

Refresh security

To update all security structures and assignments for a database, right-click the database in the Data tree, then click **Refresh security**.

Planning Analytics for Microsoft Excel: login or server access may fail in new experience

This issue may occur only when authenticating against a local TM1 database in the Planning Analytics new experience. You will not encounter this issue when authenticating against a local database in Planning Analytics classic or any Planning Analytics on Cloud database.

When attempting to log in to a TM1 database from Planning Analytics for Microsoft Excel, you may receive the following error under certain configurations or conditions: `Cannot load the requested view`.

To work around this issue, you can dismiss the error and again select the desired TM1 database and continue to log in with a valid user name.

This issue will be corrected in an upcoming release.

2.0.57 - What's new, October 2, 2020

Planning Analytics Workspace 2.0.57 SC is a local-only release that includes significant changes in the look and feel of Planning Analytics Workspace, as well as important new functionality.

Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in previous releases, see Chapter 2, “What's new in Planning Analytics Workspace,” on page 11.

Learn from the experts

There are a lot of big changes in the Planning Analytics Workspace new experience, introduced in 2.0.57 local and 2.0.58 cloud. From a completely revised interface to significant new features like forecasting, the best place to learn about these changes is from the detailed blogs created by our subject matter experts.

Click here to visit the central blog about Planning Analytics Workspace enhancements and new capabilities. From this central blog, you'll find links to other blog posts and additional information from a range of Planning Analytics Workspace pros.

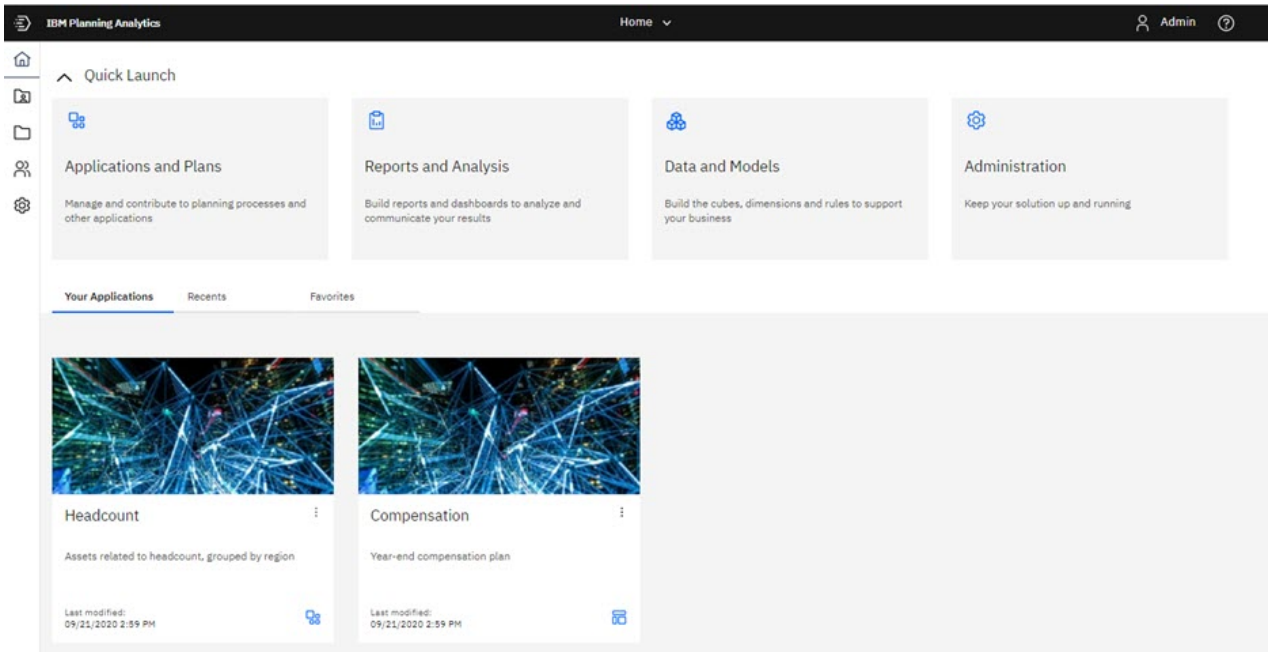
Improved look and feel

The Planning Analytics Workspace user interface has been updated to make it easier to accomplish tasks, provide a more consistent experience with other IBM products, and to simplify the transition between Planning Analytics Workspace and Cognos Analytics.

As part of the interface update, new icons adhering to the Carbon Design principles have been introduced throughout Planning Analytics Workspace. For more information about Carbon Design principles, see https://www.carbondesignsystem.com.

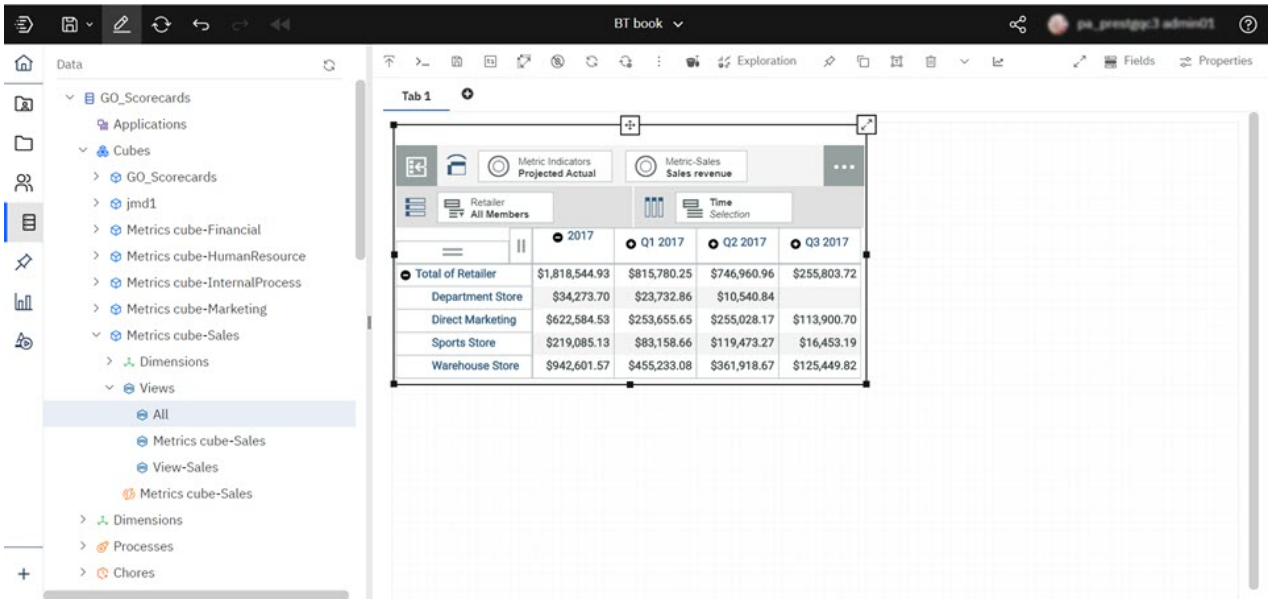
Note: Because the interface that exists in versions of Planning Analytics Workspace prior to 2.0.57 SC is still supported, it is necessary to differentiate between the new interface and the 'old' interface in the documentation. When there is a divergence of procedures or capabilities between the current (new) interface and the old, the documentation describes the current interface as Planning Analytics Workspace and describes the interface in 2.0.55 SC and prior versions as Planning Analytics Workspace Classic.

A new **Home** page for Planning Analytics Workspace is the first significant changes you'll notice. On the new **Home** page, you can quickly access the area you want to work in, customized for your role within Planning Analytics Workspace. You can also quickly open your applications and plans, as well as your recent and favorite items.



The prominent Quick Launch tiles that provide immediate access to **Applications and Plans**, **Reports and Analysis**, **Data and Models**, and **Administration** are dynamically displayed depending upon your role when you log in to Planning Analytics Workspace. Only the tiles that you can use based on your role appear. For example, an administrator sees all of the Quick Launch tiles, while an analyst sees only **Applications and Plans** and **Reports and Analysis**. You can click the Quick Launch show/hide button Quick Launch to show or hide the Quick Launch tiles. When you hide the tiles, you can see more of your applications, recent items, or favorite items.

You'll also notice improvements in other familiar places. For example, in books the user interface is simplified, new icons are present, and the toolbar has been decoupled from the view.

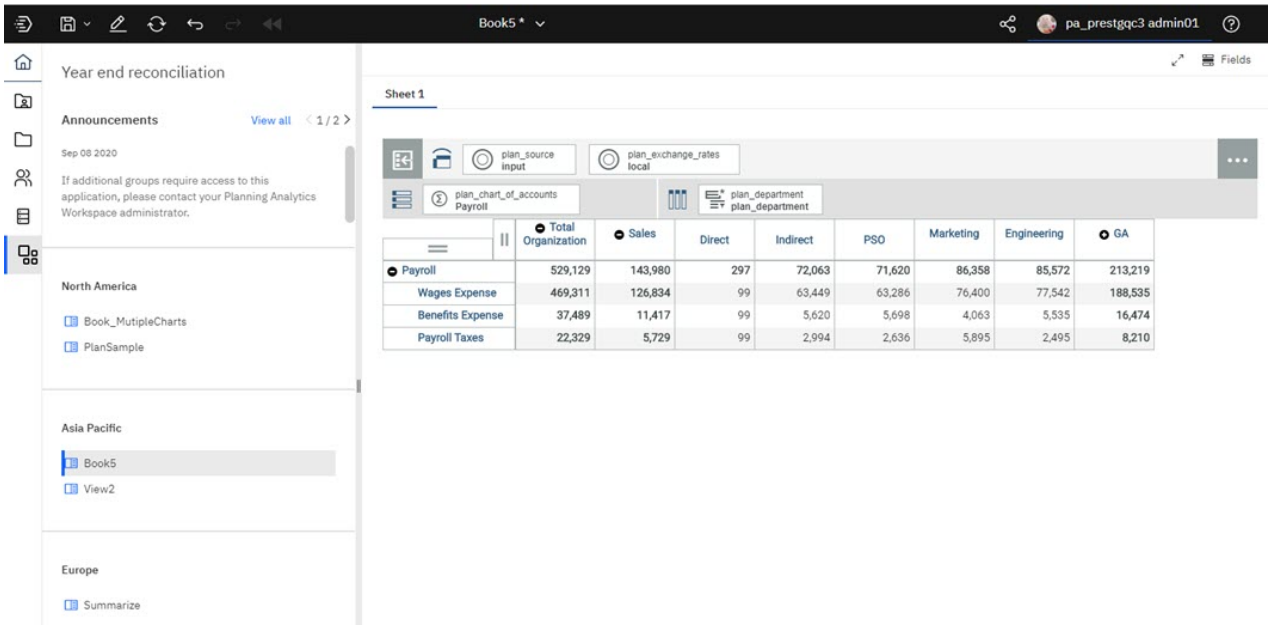


Use of the new interface is described in the relevant topics throughout the Planning Analytics Workspace help and documentation.

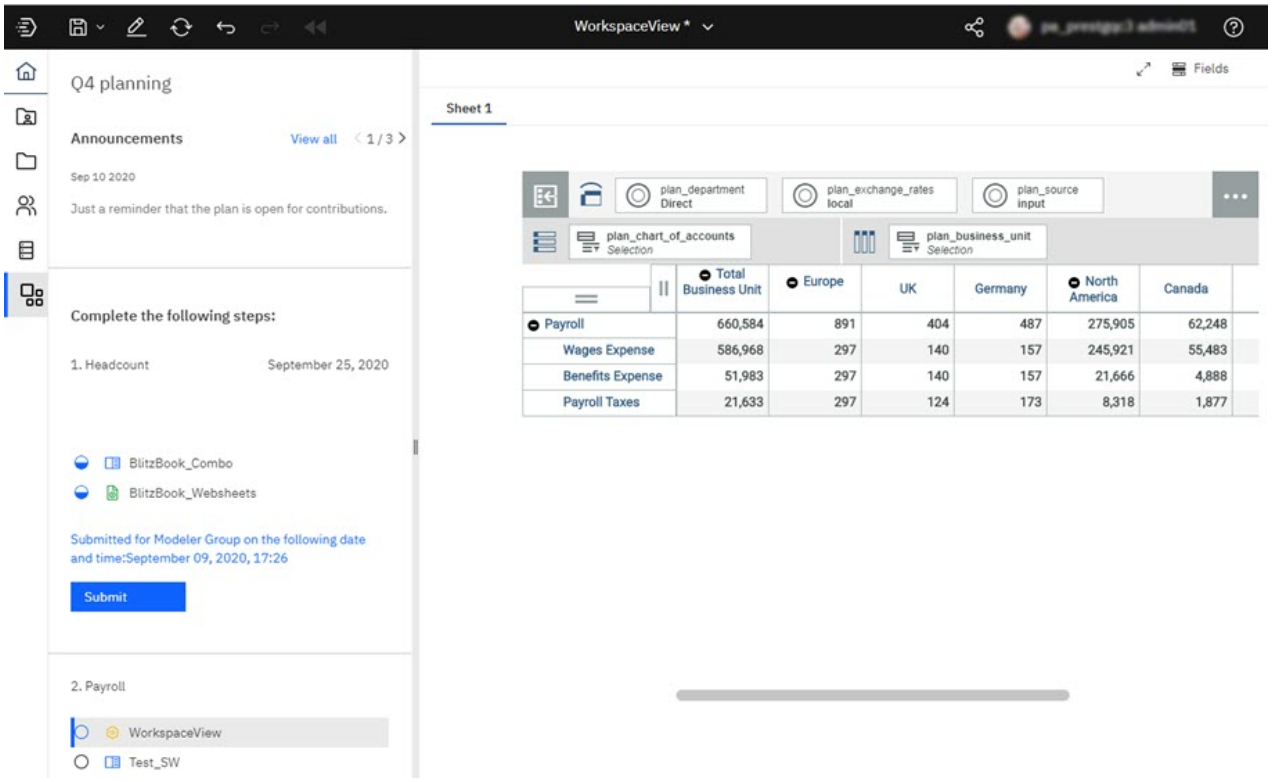
Applications and Plans

Applications and plans let you organize logically related Planning Analytics Workspace assets such as books, view, and websheets in containers.

An application contains related assets that are grouped in sections. These sections might reflect the structure of your organization, planning and budgeting requirements, or any other relevant grouping of assets. While an application contains logically related assets, there are no implied or required actions associated with the assets or sections in an application. An individual asset can belong to more than one application.



A plan contains assets that are grouped in steps. These steps can represent discrete tasks or contributions that must be completed in a planning or budgeting process. While steps can be ordered in a plan, there is no requirement for contributors to complete the steps sequentially; they can be completed in any order. Steps can also be assigned a due date for contributions. An administrator can require that steps be explicitly submitted for approval, and an administrator can reject and reset a submission.

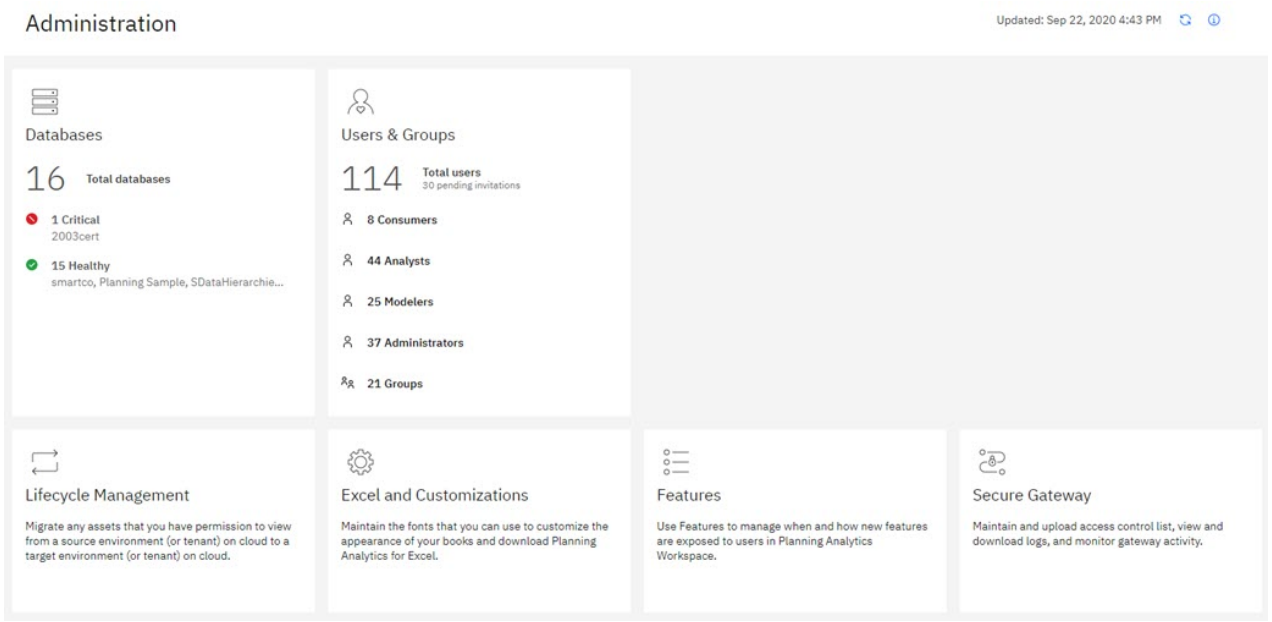


For complete details on creating, managing, and using applications and plans, see Applications and plans.

Administration page changes

The Planning Analytics Workspace **Administration** page has been reorganized to provide greater insight into your environment and to simplify access to administrative tasks.

The Administration page now includes several task-specific tiles. The Databases tile provide quick insight into the health of your databases. The Users and Groups tile lets you know how many users are assigned to each role and the number of groups that are defined.



You can click any tile to perform the administrative tasks associated with the tile.

The tiles available on the **Administration** page vary depending on whether you are running Planning Analytics Workspace Local or on Cloud. The Agents tile is available only on Local, while the Secure Gateway tile is available only on Cloud.

For complete details on using the new Administration page, see Administer Planning Analytics Workspace.

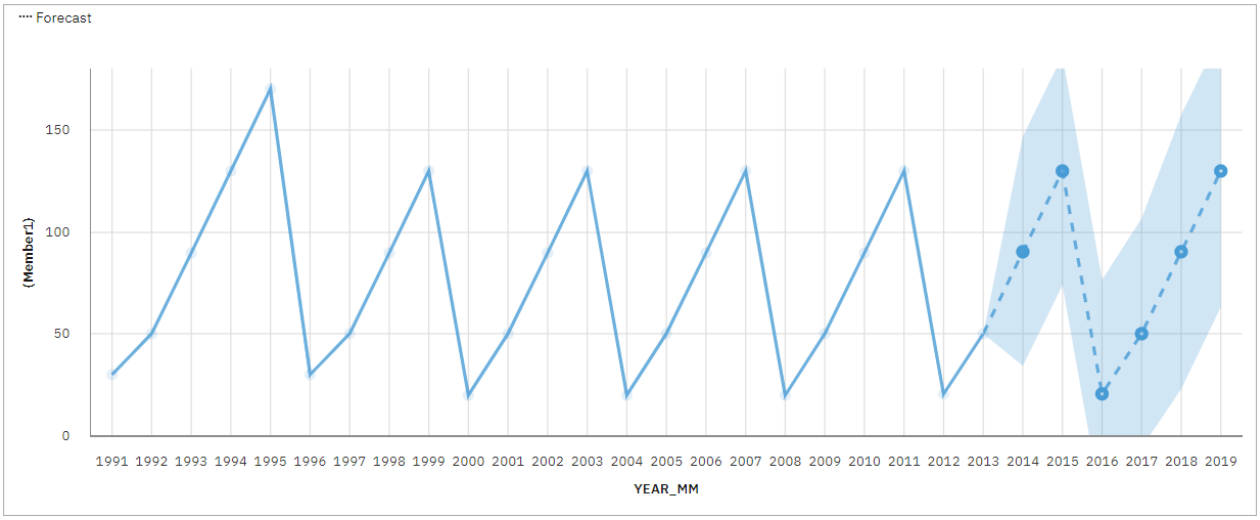
Forecasting

You can now use forecasting in IBM Planning Analytics Workspace to discover and model trend, seasonality, and time dependence in data.

You can forecast in Planning Analytics Workspace by using automated tools that model time-dependent data. Automated model selection and tuning makes forecasting easy to use, even if you are not familiar with time series modeling.

Forecasts and their confidence bounds are displayed in visualizations as a continuation of historic data. You can also view the statistical details for generated models if you want to see the technical background.

The following example shows forecasting values and confidence bounds in a line visualization.



Specifying time series in forecasts often requires data manipulation. Planning Analytics Workspace supports a wide range of time series without the need for manipulation, ranging from standard date and time types, to nested periodic and cyclical time fields. When data is recognized as a time series, data preparation is automated. Appropriate trend and seasonal periods are detected, and models are selected from a set of nine different model types.

You can forecast in line, bar, and column visualizations. Forecasting allows analysis of hundreds of time series per visualization. Forecasts and confidence bounds are computed for each time series, and displayed in the visualization as extensions of the current data. You can inspect each time series separately, and tailor the forecast and results to your own data and requirements.

If you are familiar with forecasting models, you can view the selected model type, estimated model parameters, standard accuracy measures, and processing summary information.

For complete details on using forecasting in Planning Analytics Workspace, including a complete tutorial, see Forecasting.

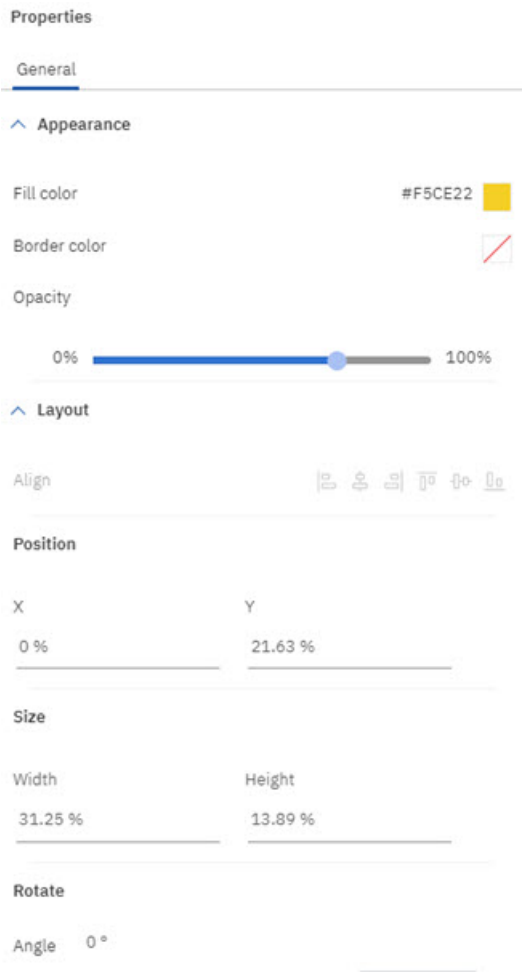
Book and visualization improvements

The properties available to manage all aspects of your books have been significantly expanded. The visualization types available to use in Planning Analytics Workspace have been updated to provide more and improved visualizations.

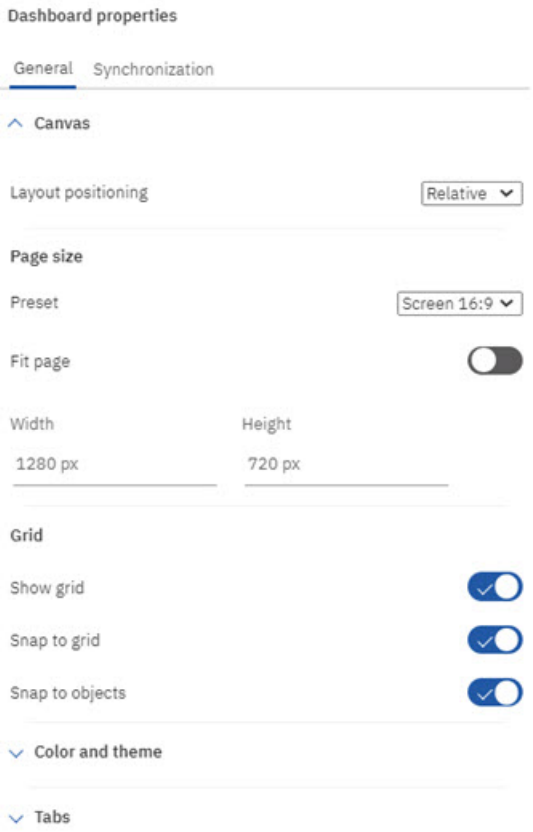
Books

All objects in a book, such as explorations, visualizations, buttons, images, and text, can now be precisely managed using an expanded selection of properties.

When you select an object in a book and then click the **Properties** tab, you'll see an expanded list of properties that you can set to manage the object in your book. The properties available vary by object type, and the properties you're familiar with are still available, but new properties allow you to precisely manage the size, position, alignment, and appearance of all objects in a book.



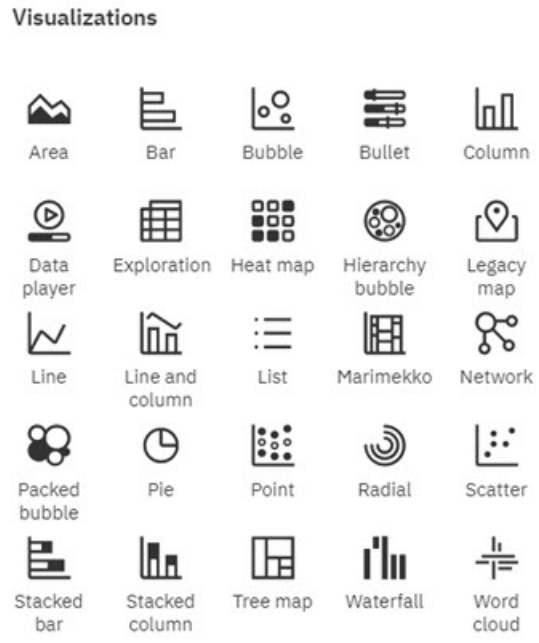
You can also set Dashboard properties to manage the general appearance of your book.



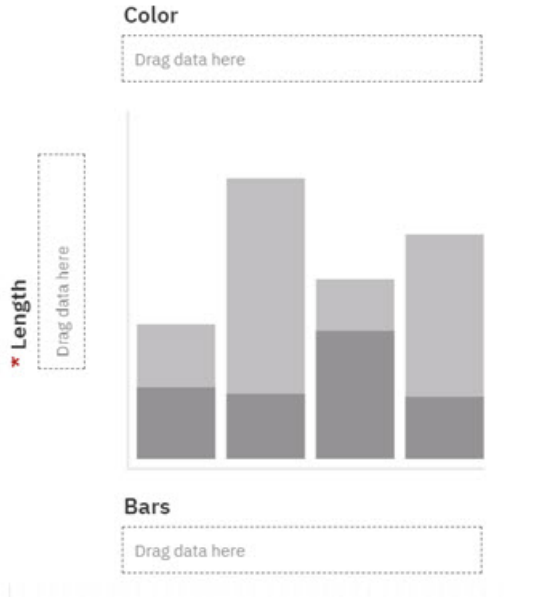
Details on using these properties are provided in the individual topics that describe how to build and manage books. For more information, see Work in books and views.

Visualizations

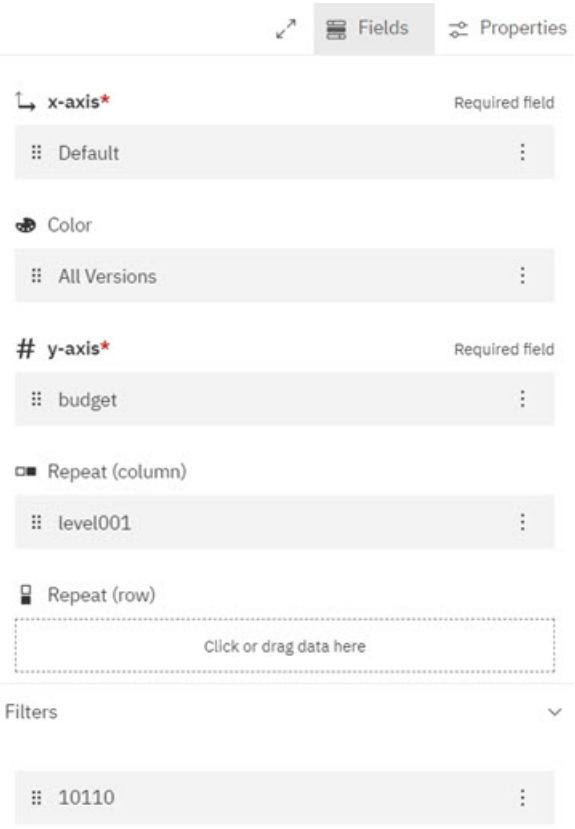
The list of visualizations available in Planning Analytics Workspace has been expanded to include twenty five options.



Explorations can be changed to visualizations in the same way you've always done it, but you can also place an empty visualization onto a book and use drop zones to build the visualization.



You can drag and drop dimensions from the Data tree onto the **Drag data here** drop zones to build a visualization from scratch. Once the visualization is complete, you can manage the visualization using the Fields tab on a book. You can drag and drop dimensions to different fields to change the structure of your visualization or you can click a field to select a new member to use in your visualization.

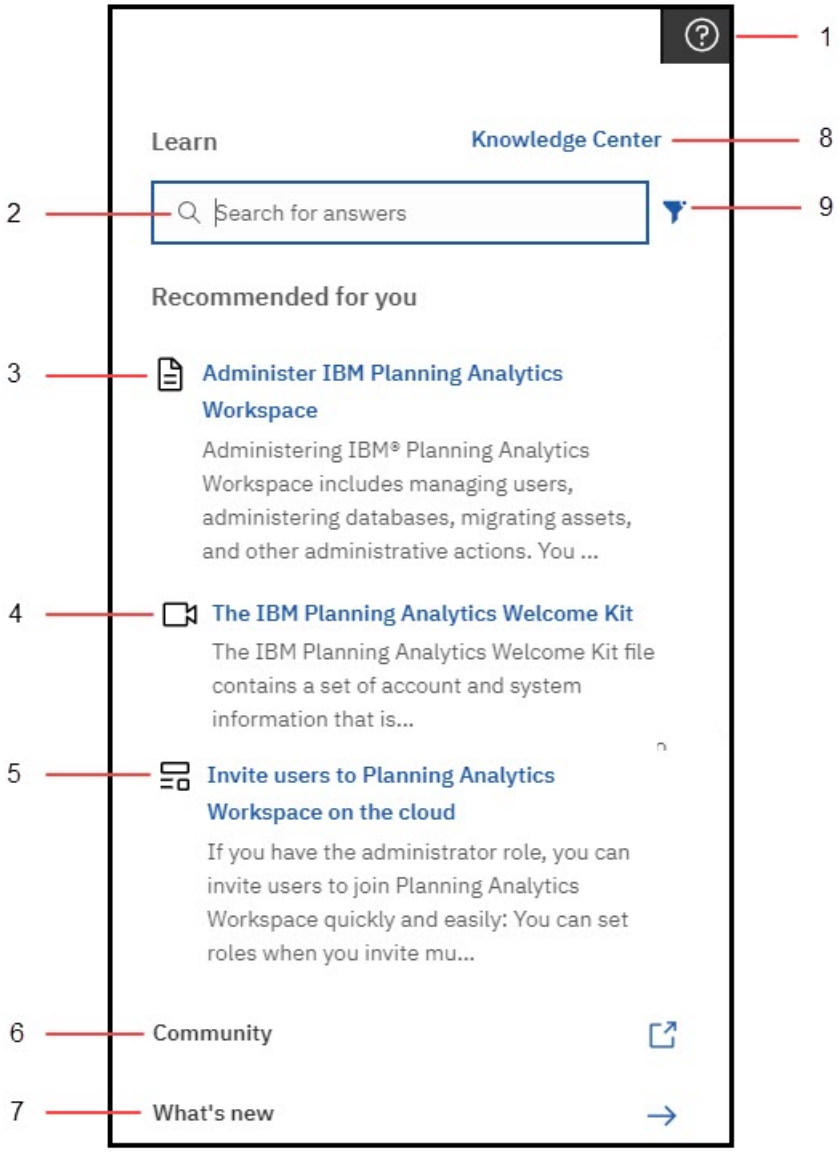


For further details, see Visualizations.

Ask for help in the cognitive Learn pane

If you want to learn more about how to use Planning Analytics Workspace, click the Help icon and ask a question. The cognitive help tailors your help experience based on where you are working in the product and finds only the answers that are relevant to your user role. You can find the latest videos, blogs, and documentation.

Use these features on the Learn pane to find answers and be more productive!



1

Click the Help icon to open the Learn pane (it remembers where you were the last time you opened it). Click anywhere to close it. The Learn pane recommends content that relates to your task and finds similar content that you might also like. And, it is always learning! When you search and find answers, you are training the Learn pane and those answers influence future recommendations.

2

Type a question in the Search box. You can search in any supported language in the Learn pane and you see translated documentation in your search results. You also see blogs and videos that match your search, however, blogs and videos aren't translated.

3

Read the formal product documentation, sourced from IBM Knowledge Center.

4. Watch a video! Sometimes the best way to learn is to see it in action.
5. Read a post in the Planning Analytics Community Blog The community blog posts are written by experts who use Planning Analytics Workspace and share their tips and tricks.
6. Go to the Planning Analytics Community. In the community, you can find the latest articles, blog posts, and events. You can also start and contribute to discussions about Planning Analytics.
7. Click **What's New** to find out what is new in the latest release of Planning Analytics Workspace.
8. Visit the IBM Knowledge Center for all IBM Planning Analytics documentation In the IBM Knowledge Center, you can read all documentation, including related products.
9. Filter your search results to show only your preferred content type: videos, blogs, or documentation.

Considerations for upgrading to Planning Analytics Workspace new experience

Users should be aware of the following considerations before upgrading to the new experience in Planning Analytics Workspace 2.0.57 SC local and 2.0.58 cloud.

The upgrade to Planning Analytics Workspace 2.0.57 SC local is a permanent upgrade. There is no way to revert to a prior version of Planning Analytics Workspace Classic.

likewise, when an administrator commits to an upgrade in 2.0.58 cloud, there is no way to revert to the 'classic' user experience.

Features not supported in initial 2.0.57 local/2.0.58 cloud releases

These features are not supported in the initial new experience Planning Analytics Workspace release. Support for these features may be reintroduced in subsequent releases.

- Tree map visualizations upgrade successfully *except* when more than one dimension is present on an axis, in which case the tree map is converted to an Exploration during book upgrade.
- The Reports and Analysis landing page does not display individual tiles for books, views, or websheets. Rather, the Reports and Analysis landing page displays a searchable and sortable list of all assets.
- Mobile devices are not fully supported in the initial new experience release, as some gestures are not yet implemented.
- An Administrator cannot set up a global color palette. (This capability is supported as of Planning Analytics Workspace 2.0.59.)
- When you click **Share** > **Export**, you cannot share a book or view as an image or PowerPoint document. You can, however, export as PDF with enhanced print options.
- The Intent bar (sometimes called the NLP bar) is not available in this release.

Differences in behavior between Planning Analytics Workspace 2.0.57 local/2.0.58 cloud and Planning Analytics Workspace Classic

- Chats are deprecated, as previously announced in this deprecation notice.
- Bookmarks and history are no longer available on the Data tree. Instead, you can use the Recents or Favorites tabs on the Planning Analytics Workspace Home page to open assets that you have recently viewed or favorited.
- Collections has been changed to Pins. You can pin a view or websheet from a book. You can access pinned items from the Pin button while in Edit mode.

2.0.55 - What's new, August 11, 2020

This version of Planning Analytics Workspace on cloud includes fixes only.

Updates to each version of Planning Analytics Workspace are cumulative. To see what was new in the previous release, see “2.0.54 - What's new, July 15, 2020” on page 53.

2.0.54 - What's new, July 15, 2020

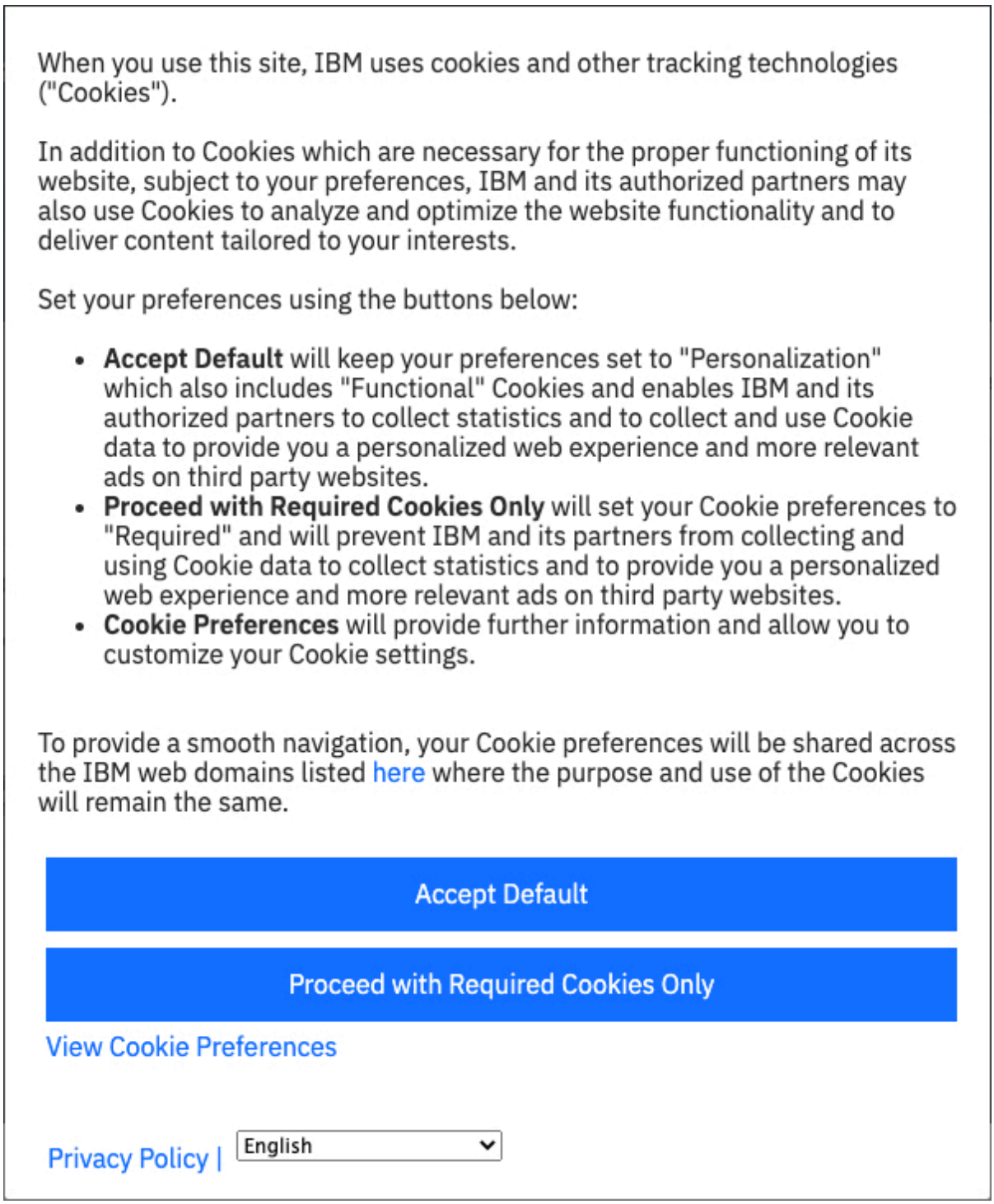
See what's new in version 2.0.54 of IBM Planning Analytics Workspace in the following topics.

Note: Planning Analytics Workspace on cloud is available from July 15, 2020. Planning Analytics Workspace local is available starting from July 12, 2020.

Set your cookie preferences

IBM begins to capture metrics of your usage of IBM Planning Analytics Workspace on cloud to improve the product, and its capabilities, with the release of 2.0.54.

If you are based in the European Union, you will see a prompt the first time that you log on after Planning Analytics Workspace on cloud is upgraded. Users are determined to be in the European Union based on their IP address by using geolocation services. Your acceptance of cookie preferences is stored as a cookie in your browser, so if you clear your cookies or change browser, you see the prompt again. This is standard behavior, and enables you to control the level of cookies that you allow to be stored.



If you are not based in the European Union, you are not prompted for cookies but you can select the level of cookies by clicking and then selecting **Cookie Preferences**. You can see more information about the levels of cookies by clicking **View Cookie Preferences** in the **Cookies** window.

To learn more, see:

Cookie preferences for Planning Analytics on cloud (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_prism_gs.2.0.0.doc/c_paw_cookies.html)

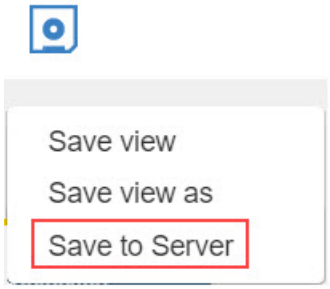
Save a view to the TM1 database

You can save a view from Planning Analytics Workspace to the TM1 database.

When a view is saved to the database, it can be used by TM1 processes as a data source from which you can extract data and create or update objects or data.

A view saved to the TM1 database is also available to any Planning Analytics client that connects to the database.

To save a view to the TM1 database, select **Save to Server** from the shortcut bar.



To learn more, see:

Save a view (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_prism_gs.2.0.0.doc/t_paw_save_view.html).

Format numbers for an entire view

You can apply number formatting for an entire view from the shortcut bar.

To apply formatting, click the **Format** icon on the shortcut bar and select the desired format.

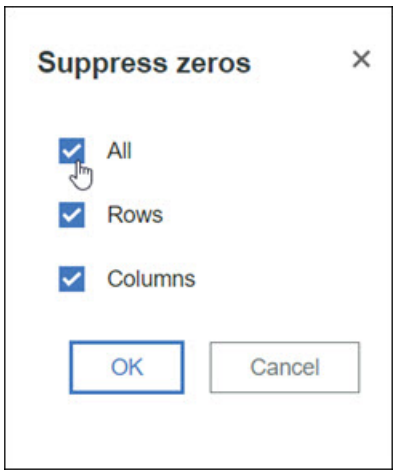
To learn more, see:

Change the format of data in a view (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_prism_gs.2.0.0.doc/t_paw_format_data.html).

Suppress zeros for an entire view

You can suppress zeros for an entire view from the shortcut bar.

To suppress all rows and columns that contain only zeros, click on the shortcut bar, then select **All**.



To learn more, see:

Suppress zeros (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_prism_gs.2.0.0.doc/t_prism_suppress.html).

Remove a user from all environments simultaneously (cloud only)

As of Planning Analytics 2.0.54, removing a user from the primary environment automatically removes the user from all environments within the organization. You no longer need to remove a user from secondary environments before removing the user from the primary environment.

2.0.53 - What's new, May 21, 2020

Planning Analytics Workspace on cloud was refreshed on May 21, 2020 to include fixes only.

IBM Planning Analytics Workspace Distributed for Planning Analytics Workspace Local now supports Red Hat OpenShift deployment. For details, see Install on OpenShift.

Chapter 3. What's new in Planning Analytics for Microsoft Excel

Read about what's new or updated in IBM Planning Analytics for Microsoft Excel.

2.0.64 - Feature updates, May 10, 2021

IBM Planning Analytics for Microsoft Excel was refreshed on May 10, 2021 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in previous releases, see What's new in Planning Analytics for Microsoft Excel (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_nfg_pax_test.html).

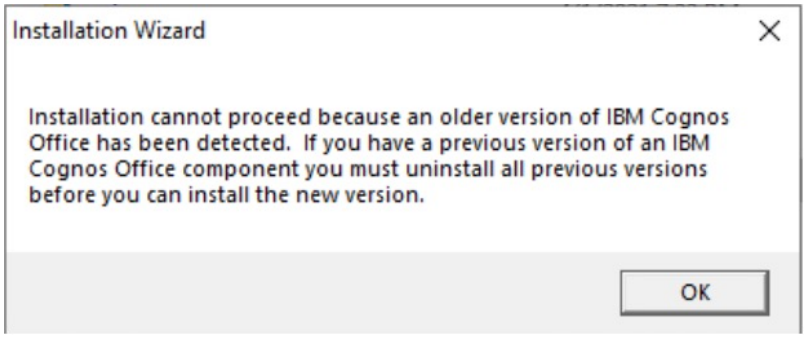
Planning Analytics for Microsoft Excel 2.0.64 compatibility with Cognos Office Connection

Users that use both Planning Analytics for Microsoft Excel as well as Cognos Office Connection are affected in their ability to upgrade to the latest release of Planning Analytics for Microsoft Excel.

Planning Analytics for Microsoft Excel 2.0.64 is not compatible with the latest release of Cognos Office Connection. This is due to conformance updates implemented in Planning Analytics for Microsoft Excel 2.0.63. These updates are fundamental to future feature development and improving the overall product experience, including the installation and post-installation experience.

Users that use both Planning Analytics for Microsoft Excel as well as Cognos Office Connection are affected in their ability to upgrade to the latest release of Planning Analytics for Microsoft Excel. Users who utilize either Cognos Office Connection or Planning Analytics for Microsoft Excel on their own may continue using the latest releases of each. For those who utilize both Planning Analytics for Microsoft Excel as well as Cognos Office Connection for their reporting needs may continue using Planning Analytics for Microsoft Excel 2.0.62 alongside the latest release of Cognos Office Connection.

If you are upgrading from Planning Analytics for Microsoft Excel version 2.0.62 to Planning Analytics for Microsoft Excel version 2.0.63 or 2.0.64, you must uninstall Planning Analytics for Microsoft Excel version 2.0.62 before upgrading. Failing to uninstall Planning Analytics for Microsoft Excel version 2.0.62 before upgrading will result in an error message.



In an upcoming release, the Planning Analytics add-in will be converted from an installer-based delivery to a single file a fraction of the size. This will also enable easier self service in enabling and disabling the add-in. Following this, a new release of Cognos Office Connection will enable the link with the installer-less Planning Analytics for Microsoft Excel.

View formula in a Custom Report is displayed by default

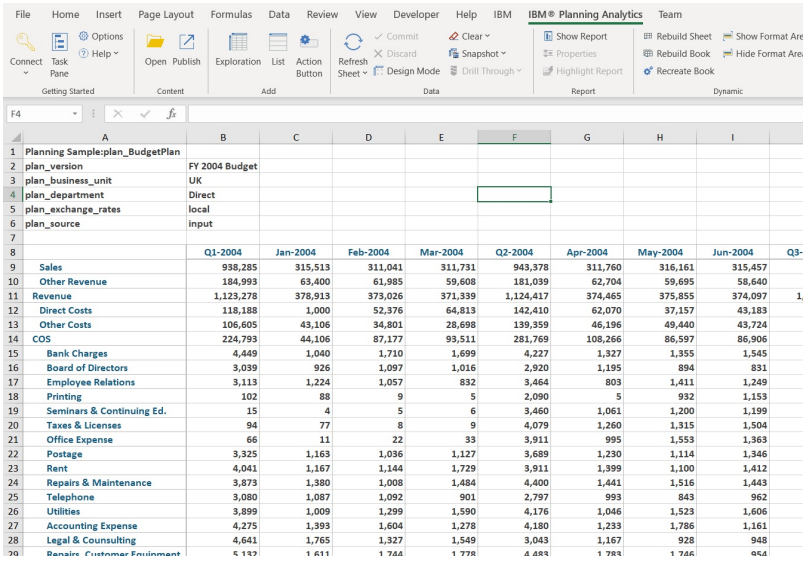
The view formula in a Custom Report is now displayed by default.

The first row of a Custom Report contains the view's formula. In previous version of Planning Analytics for Microsoft Excel, the first row of a Custom Report was hidden by default. As of Planning Analytics for Microsoft Excel 2.0.64, the first row of a Custom Report is displayed by default.

Custom Reports indented based on hierarchy level

Custom Reports are now indented based on the hierarchy level of each row.

In previous versions of Planning Analytics for Microsoft Excel, the rows in a Custom Report were not indented. As of Planning Analytics for Microsoft Excel 2.0.64, the rows of a Custom Report are indented based on the hierarchy level of the row.



	A	B	C	D	E	F	G	H	I
1	Planning Sample:plan_BudgetPlan								
2	plan_version	FY 2004 Budget							
3	plan_business_unit	UK							
4	plan_department	Direct							
5	plan_exchange_rates	local							
6	plan_source	input							
7									
8		Q1-2004	Jan-2004	Feb-2004	Mar-2004	Q2-2004	Apr-2004	May-2004	Jun-2004
9	Sales	938,285	315,513	311,041	311,731	943,378	311,760	316,161	315,457
10	Other Revenue	184,993	63,400	61,985	59,608	181,039	62,704	59,695	58,640
11	Revenue	1,123,278	378,913	373,026	371,339	1,124,417	374,465	375,855	374,097
12	Direct Costs	118,188	1,000	52,376	64,813	142,410	62,070	37,157	43,183
13	Other Costs	106,605	43,106	34,801	28,698	139,359	46,196	49,440	43,724
14	COS	224,793	44,106	87,177	93,511	281,769	108,266	86,597	86,906
15	Bank Charges	4,449	1,040	1,710	1,699	4,227	1,327	1,355	1,545
16	Board of Directors	3,039	926	1,097	1,016	2,920	1,195	894	831
17	Employee Relations	3,113	1,224	1,057	832	3,464	803	1,411	1,249
18	Printing	102	88	9	5	2,090	5	932	1,153
19	Seminars & Continuing Ed.	15	4	5	6	3,460	1,061	1,200	1,199
20	Taxes & Licenses	94	77	8	9	4,079	1,260	1,315	1,504
21	Office Expense	66	11	22	33	3,911	995	1,553	1,363
22	Postage	3,325	1,163	1,036	1,127	3,689	1,230	1,114	1,346
23	Rent	4,041	1,167	1,144	1,729	3,911	1,399	1,100	1,412
24	Repairs & Maintenance	3,873	1,380	1,008	1,484	4,400	1,441	1,516	1,443
25	Telephone	3,080	1,087	1,092	901	2,797	993	843	962
26	Utilities	3,899	1,009	1,299	1,590	4,176	1,046	1,523	1,606
27	Accounting Expense	4,275	1,393	1,604	1,278	4,180	1,233	1,786	1,161
28	Legal & Counsulting	4,641	1,765	1,327	1,549	3,043	1,167	928	948

New API methods for the Task Pane

You can now use new API methods to interact with the Task Pane.

Four new API methods have been added as of Planning Analytics for Microsoft Excel 2.0.64. You can use the new Task Pane API methods to Show, Hide, Refresh, and return the visibility state of the Task Pane.

To learn more about the new Task Pane API methods, see the following topics:

- Hide (Task Pane)
- IsVisible (Task Pane)
- Refresh (Task Pane)
- Show (Task Pane)

2.0.63 - Feature updates, April 12, 2021

IBM Planning Analytics for Microsoft Excel was refreshed on April 12, 2021 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in previous releases, see What's new in Planning Analytics for Microsoft Excel (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_nfg_pax_test.html).

Note: If you are upgrading from Planning Analytics for Microsoft Excel version 2.0.62 to Planning Analytics for Microsoft Excel version 2.0.63, you must uninstall Planning Analytics for Microsoft Excel version 2.0.62 before upgrading.

New CreateFromCVS API method

You can now use the `CreateFromCVS` API method to generate a new Exploration View or Quick Report using a common view specification (CVS).

A common view specification (CVS) is JSON that is composed of two major parts; the MDX query and a sidecar for additional state information. Data driven mechanisms, such as TurboIntegrator are only concerned with the MDX query, however user interfaces will also consume the sidecar to ensure presentation consistency. As of Planning Analytics for Microsoft Excel 2.0.63, you can use the `CreateFromCVS` API method to generate a new Exploration View or Quick Report using a CVS.

For more information, see CreateFromCVS (Exploration View) and CreateFromCVS (Quick Report).

To learn more about Common View Specifications, see Common View Specification(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_cvs.html).

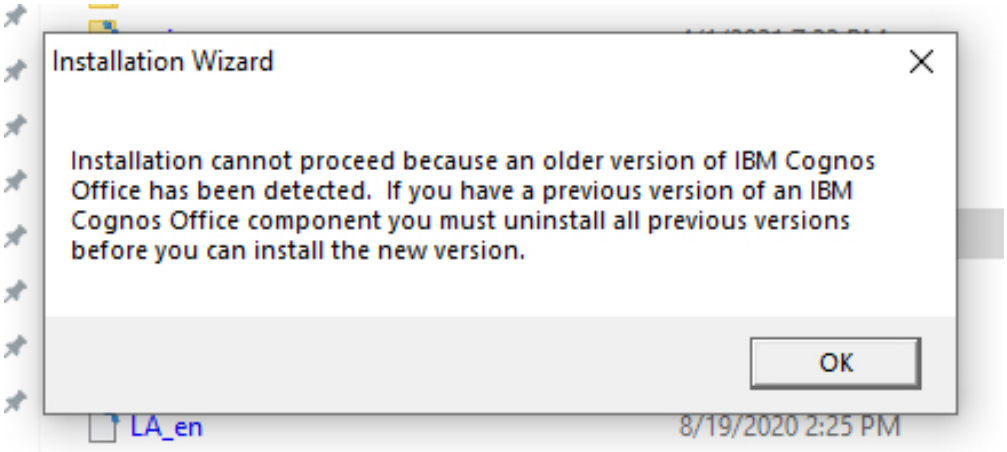
Conformance compatibility update

Planning Analytics for Microsoft Excel 2.0.63 contains conformance updates fundamental to improving the overall product experience including the installation and post-installation experience.

The 2.0.63 update of Planning Analytics for Microsoft Excel is not compatible with the current release of Cognos Office Connection. Users that use both Planning Analytics for Microsoft Excel as well as Cognos Office Connection are affected in their ability to upgrade to the latest release of Planning Analytics for Microsoft Excel.

Users who utilize either Cognos Office Connection or Planning Analytics for Microsoft Excel on their own may continue using the latest releases of each. For those who utilize both Planning Analytics for Microsoft Excel as well as Cognos Office Connection for their reporting needs may continue using Planning Analytics for Microsoft Excel 2.0.62 alongside the latest release of Cognos Office Connection.

If you are upgrading from Planning Analytics for Microsoft Excel version 2.0.62 to Planning Analytics for Microsoft Excel version 2.0.63, you must uninstall Planning Analytics for Microsoft Excel version 2.0.62 before upgrading. Failing to uninstall Planning Analytics for Microsoft Excel version 2.0.62 before upgrading will result in an error message.



In an upcoming release, the Planning Analytics add-in will be converted from an installer-based delivery to a single file a fraction of the size. This will also enable easier self service in enabling and disabling the add-in. Following this release shortly, Cognos Office Connection will enable the link between the two products once again.

2.0.62 - Feature updates, March 08, 2021

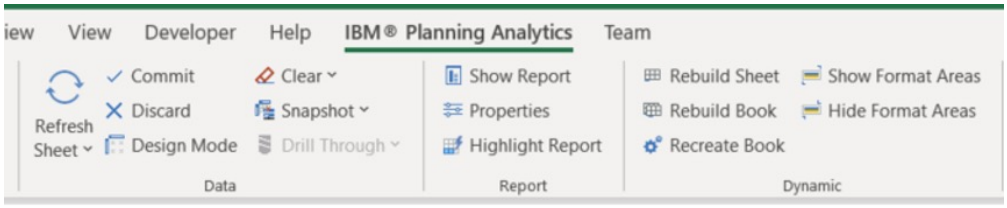
IBM Planning Analytics for Microsoft Excel was refreshed on March 08, 2021 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in previous releases, see What's new in Planning Analytics for Microsoft Excel (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_nfg_pax_test.html).

New Report ribbon group

You can show reports, highlight report areas, and view report properties with the new **Report** ribbon group in Planning Analytics for Microsoft Excel.

Planning Analytics for Microsoft Excel now features a new group in the ribbon area, called **Report**. The **Report** ribbon group contains buttons which you can use to quickly show the report of a highlighted cell, highlight the report area of a highlighted cell, and view the report properties of a highlighted cell.



For more information on this feature, see User interface overview(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_userinterface.html)

2.0.61 - Feature updates, February 9, 2021

IBM Planning Analytics for Microsoft Excel was refreshed on February 9, 2021 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in previous releases, see What's new in Planning Analytics for Microsoft Excel (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_nfg_pax_test.html).

Timeouts in IBM Planning Analytics for Microsoft Excel

Planning Analytics for Microsoft Excel is now enforcing an inactivity timeout if the user does not interact with a TM1 Server component for 60 minutes.

There is a new inactivity timeout for Planning Analytics for Microsoft Excel users when configured with Planning Analytics Workspace on Cloud version 2.0.61 or newer. The new inactivity timeout is designed to enhance security.

If the user does not interact with any TM1 Server components in Planning Analytics for Microsoft Excel for 60 minutes, they will be disconnected and will be required to log in again. Examples of TM1 Server components in Planning Analytics for Microsoft Excel include the set editor, the task pane, and sending and retrieving data in general.

Note: When a user is disconnected due to an inactivity timeout, they do not experience a loss of state. Upon logging back in, the user does not lose any changes or data due to the timeout.

For more information on the inactivity timeout, see Connection timeouts in Planning Analytics Workspace on Cloud.

2.0.60 - Feature updates and known issues, December 17, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on December 17, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in previous releases, see What's new in Planning Analytics for Microsoft Excel (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_nfg_pax_test.html).

Show and hide your TM1 servers

You can now select specific TM1 servers to hide in Planning Analytics for Microsoft Excel.

In previous versions of Planning Analytics for Microsoft Excel, you were shown a full list of all of the TM1 servers in your TM1 datasources when connecting to a TM1 datasource from the ribbon or from the task pane. As of Planning Analytics for Microsoft Excel version 2.0.60, you can now select specific TM1 servers to hide from these menus. For more information on this feature, see Show and hide servers in a TM1 datasource(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_hide_tm1_server.html)

Saving or renaming a view in the set editor

When you save or rename a view in the set editor, the title bar in the set editor now updates to display the name of the view. A view saved from the set editor now also automatically appears in the task pane.

In previous versions of Planning Analytics for Microsoft Excel, the title bar of the set editor did not update to show the name of the view. As of Planning Analytics for Microsoft Excel version 2.0.60, when you save or rename a view, the title bar of the set editor shows the updated view name. The task pane now also shows new views that are saved from the set editor without the need to manually refresh the task pane.

Quick Report sheet names in the task pane

Quick Report sheet names are updated in the **Workbook** tab of the task pane.

In previous versions of Planning Analytics for Microsoft Excel, the **Workbook** tab only displayed the sheet number of a sheet. As of Planning Analytics for Microsoft Excel version 2.0.60, Quick Report sheets in the **Workbook** tab now display a sheet name in the following format: `Sheet[sheet number] [cube name]: [report name] [Report ID number]`.

Planning Analytics for Microsoft Excel: login or server access may fail in new experience

This issue may occur only when authenticating against a local TM1 database in the Planning Analytics new experience. You will not encounter this issue when authenticating against a local database in Planning Analytics classic or any Planning Analytics on Cloud database.

When attempting to log in to a TM1 database from Planning Analytics for Microsoft Excel, you may receive the following error under certain configurations or conditions: `Cannot load the requested view`.

To work around this issue, you can dismiss the error and again select the desired TM1 database and continue to log in with a valid user name.

This issue will be corrected in an upcoming release.

2.0.59 - Feature updates and known issues, November 13, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on November 13, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in previous releases, see What's new in Planning Analytics for Microsoft Excel (https://www.ibm.com/

support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_nfg_pax_test.html).

MDX and TM1 Server views are listed together in the source tree

The source tree now presents MDX views and TM1 Server views combined in a single group, sorted alphabetically.

In previous versions of Planning Analytics for Microsoft Excel, MDX views were listed in one group, while TM1 Server views were listed a separate group,

Planning Analytics for Microsoft Excel: login or server access may fail in new experience

This issue may occur only when authenticating against a local TM1 database in the Planning Analytics new experience. You will not encounter this issue when authenticating against a local database in Planning Analytics classic or any Planning Analytics on Cloud database.

When attempting to log in to a TM1 database from Planning Analytics for Microsoft Excel, you may receive the following error under certain configurations or conditions: `Cannot load the requested view`.

To work around this issue, you can dismiss the error and again select the desired TM1 database and continue to log in with a valid user name.

This issue will be corrected in an upcoming release.

2.0.58 - Feature updates and known issues, October 20, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on October 20, 2020.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.57 - Feature updates, September 14, 2020 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_57.html).

Updates to the IBM Planning Analytics with Watson ribbon

The IBM Planning Analytics with Watson ribbon has been updated in Planning Analytics for Microsoft Excel.

As of Planning Analytics for Microsoft Excel version 2.0.58, the IBM Planning Analytics with Watson ribbon has been updated to improve usability and to maximize space.

Quick Reports

The ribbon group for Quick Reports has been removed, however all functionality is still accessible either from the **Data** ribbon group or from the task pane. For more information, see:

- Clearing all data from a Quick Report
- Refresh
- Commit data in a Quick Report

Dynamic Reports

The Dynamic Reports ribbon group has now been renamed to **Dynamic**. All functionality remains the same.

Planning Analytics for Microsoft Excel: login or server access may fail in new experience

This issue may occur only when authenticating against a local TM1 database in the Planning Analytics new experience. You will not encounter this issue when authenticating against a local database in Planning Analytics classic or any Planning Analytics on Cloud database.

When attempting to log in to a TM1 database from Planning Analytics for Microsoft Excel, you may receive the following error under certain configurations or conditions: `Cannot load the requested view`.

To work around this issue, you can dismiss the error and again select the desired TM1 database and continue to log in with a valid user name.

This issue will be corrected in an upcoming release.

2.0.57 - Feature updates, September 14, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on September 14, 2020 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.56 - Feature updates, August 12, 2020 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_56.html).

2.0.56 - Feature updates, August 12, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on August 12, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.55 - Feature updates, July 16, 2020 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_55.html).

Cube Viewer

Starting in IBM Planning Analytics for Microsoft Excel version 2.0.56, you can change the font size and save views in the Cube Viewer.

Changing the font size

If you're working with large dimensions or sets, you can change the font size of the Cube Viewer to display more data.

For more information about changing the font size in the Cube Viewer, see Change the font size(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_cube_viewer_zoom.html).

Save views as part of the cube

After you are finished working in the Cube Viewer, you can save your views as part of the cube. To use this feature, ensure that you also have IBM Planning Analytics Workspace version 2.0.56 or later installed.

For more information about saving views from the Cube Viewer, see Save a view from the Cube Viewer(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_save_cube_viewer.html).

Changing hierarchies

If your dimension contains multiple hierarchies, you can use the set editor or Cube Viewer to change the hierarchy that's being used in your report.

For more information about changing the hierarchy of a report, see Change the hierarchy(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_change_hierarchy.html).

2.0.55 - Feature updates, July 16, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on July 16, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.54 - Feature updates, June 12, 2020 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_54.html).

Converting reports

As of 2.0.55, if you are converting reports in IBM Planning Analytics for Microsoft Excel, you can define whether or not the converted report uses Microsoft Excel's stylesheet formatting.

You can decide whether or not your converted reports use stylesheet formatting. When you convert a report directly from an Exploration View, the converted report uses stylesheet formatting if you have **Use Excel Formats** enabled. If you are creating or converting a report from the source tree, the cube viewer, or another path, the converted report defaults to using stylesheet formatting.

For more information about converting reports, see Converting a report from an Exploration View(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_convert_reports.html).

2.0.54 - Feature updates, June 12, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on June 12, 2020 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.53 - Feature updates, May 15, 2020 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_53.html).

2.0.53 - Feature updates, May 15, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on May 15, 2020 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.52 - Feature updates, April 16, 2020 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_52.html).

2.0.52 - Feature updates, April 16, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on April 16, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see “2.0.51 - Feature updates, March 06, 2020” on page 66 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_51.html).

All connections are switching to IBM Planning Analytics Workspace

As of 2.0.52, if you are using TM1 Server 2.0.9 or newer and have any connections through PMHub in IBM Planning Analytics for Microsoft Excel, your connections will be switched to solely go through Planning Analytics Workspace.

All new connections in Planning Analytics for Microsoft Excel currently go through Planning Analytics Workspace. Existing PMHub connections will be switched to Planning Analytics Workspace connections if you are using Planning Analytics for Microsoft Excel 2.0.52 or newer with TM1 Server 2.0.9 or newer.

Improvements to the set editor

As of 2.0.52, the set editor has a number of improvements to make it easier to work with large dimensions.

To use the updated set editor, ensure that you have IBM Planning Analytics Workspace version 2.0.52 or later installed. Refer to the Planning Analytics for Microsoft Excel conformance requirements.

Note: If you are using IBM Planning Analytics for Microsoft Excel versions 2.0.51 and older with Planning Analytics Workspace versions 2.0.52 and newer, you will see all of the new set editor features, however any changes made in the default view settings for the Available Members and Current Set panes will not be saved.

Focus on one area at a time

You can hide the pane that you are not currently working in to enable you to focus on one area at a time.

Maximize the set editor

Quickly maximize the set editor by clicking the **Max** icon .

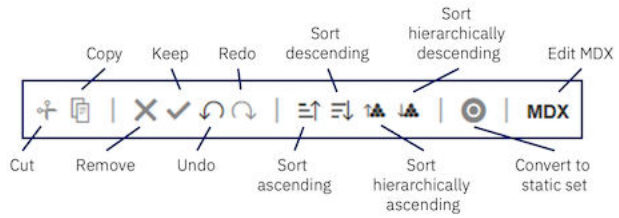
Note: If you added the set editor from the tree, you can resize the set editor by dragging the grab handles.

Drag and drop

Drag members into the **Current Set** from **Available Members**. Dragging uses the default insert settings . If there are a lot of members in the **Current Set**, you can scroll down the pane while dragging the selection into the correct position.

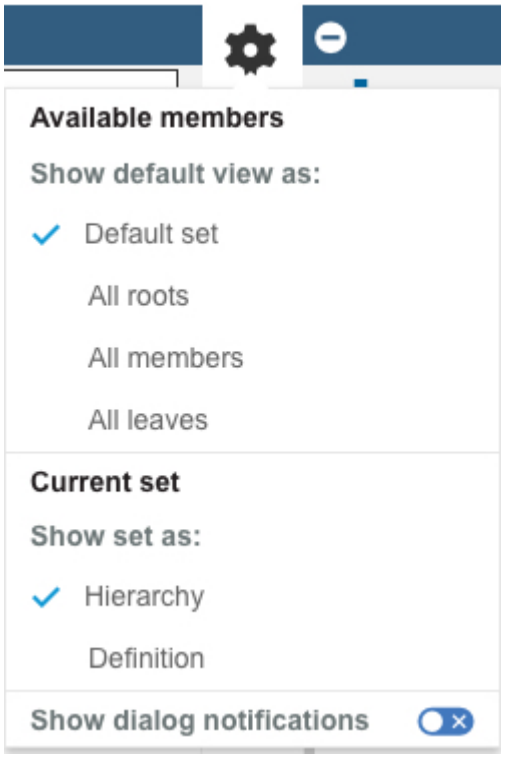
Easy access to functions

The new toolbar makes it easy to edit the members in the current set, with the most frequently used functions available.



Configure default view settings for the Available Members and Current Set panes

For the **Available Members** pane, you can choose to display **Default set**, **All roots**, **All members**, or **All leaves** by default. For the **Current Set** pane, you can choose whether to display the members as a **Hierarchy**, or as a **Definition** (MDX).



Click ⚙ to access the **Settings** menu.

For more information about the set editor, see Sets(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_paw_set.html).

Version requirements for using IBM Planning Analytics for Microsoft Excel 2.0.52 with TM1 Server.

Improvements in IBM Planning Analytics for Microsoft Excel 2.0.52 are tested on the current supported TM1 Server versions (For more information on supported TM1 Server versions, see IBM Planning Analytics for Microsoft Excel conformance requirements. Please note that some functionality will not work as expected in TM1 Server versions 2.0.5 and older.

2.0.51 - Feature updates, March 06, 2020

IBM Planning Analytics for Microsoft Excel was refreshed on March 06, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see “2.0.50 - Feature updates, February 7, 2020” on page 67 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_50.html).

Update the datasource or package for Exploration Views in bulk

As of version 2.0.51, you can now bulk update the datasource or package for multiple Exploration Views at the same time.

To bulk update the datasource or package for your Exploration Views, you need to use the `BulkSerializeUtil` command. For more information, see Bulk update the datasource or package for Exploration Views(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_exploration_bulk_update_server.html)

2.0.50 - Feature updates, February 7, 2020

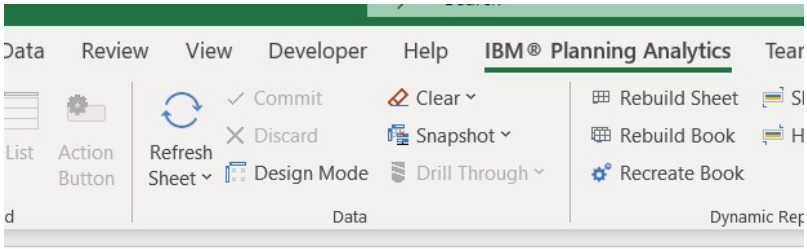
IBM Planning Analytics for Microsoft Excel was refreshed on February 7, 2020 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see "2.0.49 - Feature updates, December 19, 2019" on page 67 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_49.html).

Improvements to Design Mode

As of 2.0.50, use **Design Mode** to preserve or clear DBRW formulas when you are copying and pasting values into cells.

Design Mode is a handy tool that can be used to enable or disable the refreshing of an Exploration View upon every change. You can now also use **Design Mode** to preserve or clear DBRW formulas when you are copying and pasting values into cells. Simply enable or disable **Design Mode** from the **Data** group in the IBM Planning Analytics ribbon.



For more information about **Design Mode**, see Design Mode(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_design_mode.html).

2.0.49 - Feature updates, December 19, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on December 19, 2019 to include the following features and notices.

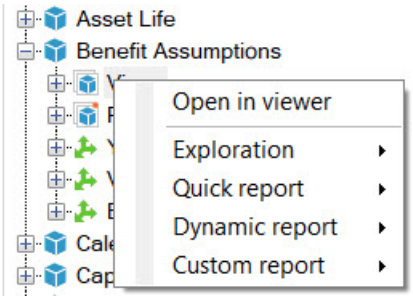
Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see "2.0.48 - Feature updates, November 20, 2019" on page 68 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_48.html).

Quickly access views from the IBM task pane

As of 2.0.49, you can open views from the IBM task pane.

You can now quickly access views from the IBM task pane by double-clicking a cube or Views node. You can also open a view by right-clicking a cube or Views node and selecting **Open in viewer** from the right-click menu.

Additionally, when you right-click a cube or Views node on the task pane, you can choose to run as one of the available report types.



For more information about the IBM task pane and how you can open views from the task pane, see IBM task pane(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_taskpane.html).

2.0.48 - Feature updates, November 20, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on November 20, 2019 to include the following features and notices.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.47 - Feature updates, October 15, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_47.html).

Show the information header in a Quick Report

Starting in 2.0.48, you can show or hide header information in a Quick Report. The header information includes the host URL, server name, and the cube name for the Quick Report.

For more information about the information header, see Show the information header in a Quick Report(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_qr_header_informtion.html).

For more information on enabling the information header, see Manually enabling features in the tm1features.json file(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/r_pax_tm1features.html).

Dimension names are automatically displayed in a Quick Report

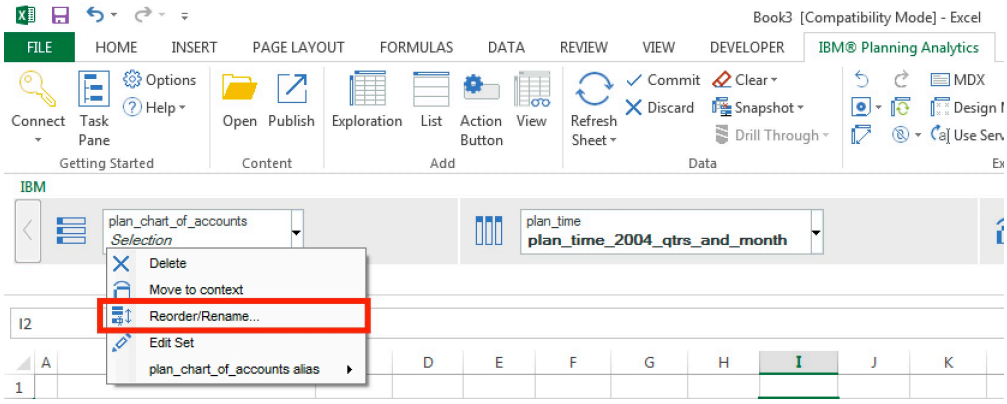
When you create or open a Quick Report, the names of the dimensions used in the Quick Report are automatically displayed at the top of the report.

For more information about Quick Reports, see Quick Reports(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_ug_cxr_powersheets.html).

Deprecation notice for the Reorder/Rename feature in Exploration Views and lists

In IBM Planning Analytics for Microsoft Excel version 2.0.49, the Reorder/Rename feature in Exploration Views and lists will be deprecated.

The Reorder/Rename feature:



- You can use the set editor to reorder your members. For more information, see Reorder members in a set(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_set_editor_reorder_members.html).
- You can still use aliases to rename a member.
- To rename a calculated column or row, edit the column or row header. For more information, see Rename a calculated column or row(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_exploration_rename_calculation.html).

2.0.47 - Feature updates, October 15, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on October 15, 2019 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.46 - Feature updates, September 13, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_46.html).

2.0.46 - Feature updates, September 13, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on September 13, 2019 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.45 - Feature updates, August 16, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_45.html).

2.0.45 - Feature updates, August 16, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on August 16, 2019 to include fixes only.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.44 - Feature updates, July 30, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_44.html).

2.0.44 - Feature updates, July 30, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on July 30, 2019 to include the following features.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.43 - Feature updates, June 19, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_43.html).

Save your Exploration Views to the Planning Analytics Workspace Content Store!

As of 2.0.44, you can save your Exploration Views to the Planning Analytics Workspace Content Store.

Save your Exploration View to the Planning Analytics Workspace Content Store
Saving your Exploration Views to the Planning Analytics Workspace Content Store allows you to save enhanced views, and share your views between IBM Planning Analytics Workspace and IBM Planning Analytics for Microsoft Excel.

Share views between Planning Analytics Workspace and Planning Analytics for Microsoft Excel
Saving your Exploration View to the Planning Analytics Workspace Content Store allows you to share your views toPlanning Analytics Workspace and Planning Analytics for Microsoft Excel. Simply access the Planning Analytics Workspace from either product and open the view for quick and flexible collaboration.

The versatility of MDX Views
MDX expressions can be a powerful tool for storing and generating views. When you save your Exploration View to the Planning Analytics Workspace Content Store, the view is stored as an MDX expression. Just like in an MDX View, you can store calculations or headers, and define asymmetric axes when you save your Exploration Views to the Planning Analytics Workspace Content Store.

Compatibility
Planning Analytics for Microsoft Excel version 2.0.44 used with Planning Analytics Workspace version 2.0.44 will receive full support for saving to the Planning Analytics Workspace Content Store.

You also need IBM Planning Analytics version 2.0.7 IF 3 or newer installed. It is recommended that you install IBM Planning Analytics version 2.0.8 or newer.

For more information about saving your Exploration Views to the Planning Analytics Workspace Content Store, see Methods for saving an Exploration View(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_exploration_save.html).

Enhanced clear functionality for Exploration Views

The clear functionality when applied to an Exploration View has been improved as of 2.0.44.

Using **Clear workbook**, **Clear worksheet**, or **Clear data** on an Exploration View or list view will now also clear any items in the context area drop zone.

For more information about clearing Exploration Views, see Clearing all data from an Exploration View or list view(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_clear_data_exploration.html).

MDX button disabled after clearing an Exploration View or list view

As of 2.0.44, the MDX button will be temporarily disabled after a user clears an Exploration View or list view.

When you clear data in an Exploration View or list view, the cleared cells remain as blank cells on the report. Clearing the content does not break the link to the datasource. As of version 2.0.44, when you clear data in an Exploration View or list view, the button to open the MDX editor is temporarily disabled. This feature prevents other users from viewing the worksheet's MDX expression, which may contain information about the datasource.

The button to open the MDX editor is enabled again if the Exploration View or list view is refreshed by the user that initially cleared the data. When the view is refreshed, the context dimensions will query for the first available member for each subset and update the selections and the MDX expression is updated.

For more information about clearing Exploration Views, see Clearing all data from an Exploration View or list view(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_clear_data_exploration.html).

Actions to prompt a Constrained Calculation

As of 2.0.44, you can use a number of actions to prompt a Constrained Calculation in IBM Planning Analytics for Microsoft Excel.

Constrained Calculations can be used in Planning Analytics for Microsoft Excel to limit recalculations strictly to a specified worksheet. Because Planning Analytics for Microsoft Excel is only recalculating the single worksheet, you may notice improved performance when refreshing a single worksheet. The 2.0.44 release of Planning Analytics for Microsoft Excel has enabled new actions that will prompt a recalculation when Constrained Calculations are enabled.

To learn more about the actions you can use to prompt a recalculation, see Actions that prompt a Constrained Calculation(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/r_pax_constrainedcalculationgestures.html).

To learn more about Constrained Calculations, see Constrained Calculations(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_constrainedcalculations.html).

2.0.43 - Feature updates, June 19, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on June 19, 2019 to include the following features.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.42 - Feature updates, May 13, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_42.html).

Support for Microsoft Excel 2019

Starting in version 2.0.43, IBM Planning Analytics for Microsoft Excel will now be compatible with Microsoft Excel 2019.

You can now use Planning Analytics for Microsoft Excel with Microsoft Excel 2019. For more information on supported software environment, see the IBM Software Product Compatibility Reports (https://www.ibm.com/software/reports/compatibility/clarity/index.html).

2.0.42 - Feature updates, May 13, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on May 13, 2019 to include the following features.

Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.41 - Feature updates, April 12, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_41.html).

Quickly access the set editor from the IBM task pane

As of 2.0.42, you can open the set editor from the IBM task pane.

You can now quickly access the set editor from the IBM task pane by double-clicking a dimension or named set, or by right-clicking a dimension or named set and opening the set editor from the right-click menu.

For more information about the IBM task pane and how you can open the set editor from the IBM task pane, see IBM task pane(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_taskpane.html).

Set data refresh options for your views

As of 2.0.42, you can set a data refresh option for your views from the cube viewer.

Using the Cube Viewer, you can define how data refreshes are triggered in your view.

For more information about how you can set data refresh options for your views, see Set data refresh options for a view(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/t_pax_cubeviewer_autorecalc.html).

Use Planning Analytics for Microsoft Excel without Performance Manager Hub

Planning Analytics for Microsoft Excel no longer requires IBM Cognos Performance Management Hub (PMHub) to access the TM1 Server or TM1 Admin Server.

For more information about how you can use Planning Analytics for Microsoft Excel without Performance Manager Hub, see Using Planning Analytics for Microsoft Excel without Performance Manager Hub (https://www-01.ibm.com/support/docview.wss?uid=ibm10883120).

2.0.41 - Feature updates, April 12, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on April 12, 2019 to include the following features.Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.40 - Feature updates, February 22, 2019 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_40.html).

Speed up your worksheet refreshes with Constrained Calculations

As of 2.0.41, you can improve the performance and speed of your single worksheet refreshes using Constrained Calculations.

When you refresh your worksheet, IBM Planning Analytics for Microsoft Excel will recalculate every worksheet in your workbook. Using Constrained Calculations is an easy way to narrow the scope of the recalculates to just your active worksheet.

For more information about Constrained Calculations, see Constrained Calculations(https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_constrainedcalculations.html).

2.0.40 - Feature updates, February 22, 2019

IBM Planning Analytics for Microsoft Excel was refreshed on February 22, 2019 to include fixes.Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.39 - Feature updates, December 21, 2018 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_39.html).

2.0.39 - Feature updates, December 21, 2018

IBM Planning Analytics for Microsoft Excel was refreshed on December 21, 2018 to include fixes.Updates to each version of Planning Analytics for Microsoft Excel are cumulative. To see what was new in the previous release, see 2.0.38 - Feature updates, November 27th, 2018 (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.ug_cxr.2.0.0.doc/c_pax_new_features_2_0_38.html).

New API function for Quick Reports

As of 2.0.39, you can use the `ReplaceWithFormats` function to replace the MDX statement in a Quick Report with another MDX statement. `ReplaceWithFormats` also has an option to preserve or destroy the existing sheet formatting in the Quick Report.

To find out more, see ReplaceWithFormats (https://ibm.github.io/paxapi/#replacewithformats).

2.0.38 - Feature updates, November 27, 2018

IBM Planning Analytics for Microsoft Excel was refreshed on November 27, 2018 to include fixes.Updates to each version of Planning Analytics for Microsoft Excel are cumulative.

Chapter 4. What's new in TM1 Web

There are new features in IBM TM1 Web. For more information, see the *TM1 Web* documentation in IBM Knowledge Center.

2.0.64 - Feature updates, May 13, 2021

IBM® Planning Analytics TM1 Web was refreshed on May 13, 2021 to include fixes only.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

2.0.63 - Feature updates, April 12, 2021

IBM® Planning Analytics TM1 Web was refreshed on April 12, 2021 to include the following updates.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

Retrieve data from multiple TM1 databases in a websheet

You can now retrieve data from more than one TM1 database in a websheet. Limitations to this ability that were present in previous releases have been removed.

Planning Analytics SC 2.0.62 introduced the ability to retrieve data from multiple TM1 databases in a websheet, but imposed two limitations:

- all databases referenced in a websheet had to be registered on the same Admin host
- you could use multiple TM1 databases in a websheet only on Planning Analytics Local

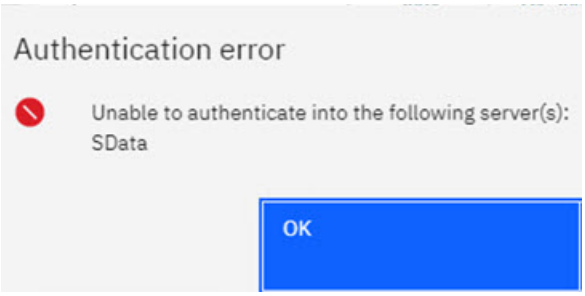
These limitations have been removed. A websheet can now reference databases that are registered on different Admin hosts. You can also retrieve data from multiple TM1 databases in a websheet on both Planning Analytics Workspace Local and Planning Analytics on Cloud.

You can retrieve data from multiple databases only in Custom Reports and Dynamic Reports, which use the VIEW function to retrieve data.

To successfully reference multiple databases in a websheet:

- Database names must be static; computed database names are not supported.
- All databases must be configured to use the same authentication mode.
- Users must have common credentials across databases.

If one of the referenced databases is not running or a connection cannot be established, you will see an error in the websheet.



You can learn more about websheets in the Websheets overview.

2.0.62 - Feature updates and known issues, March 8, 2021

IBM® Planning Analytics TM1 Web was refreshed on March 8, 2021. This release includes a a known issue regarding unexpected labels in websheet Scatter Charts, which is described here.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

Retrieve data from multiple TM1 databases in a websheet (Planning Analytics Workspace local only)

You can now retrieve data from more than one TM1 database in a websheet.

All databases referenced in a websheet must be registered on the same Admin host.

You can retrieve data from multiple databases only in Custom Reports and Dynamic Reports, which use the VIEW function to retrieve data.

To successfully reference multiple databases in a websheet:

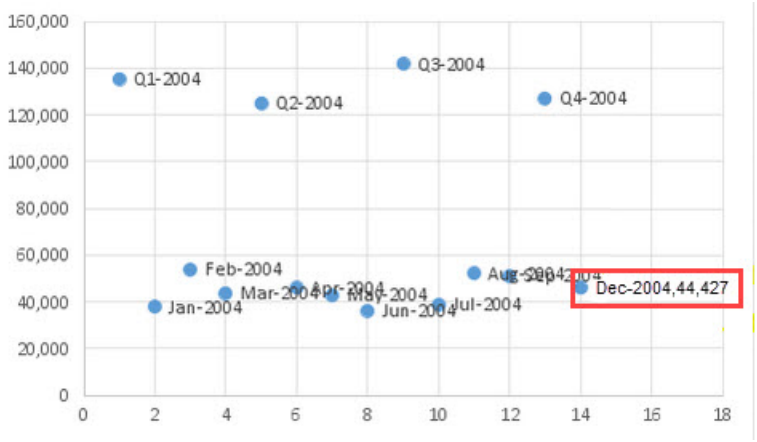
- Database names must be static; computed database names are not supported
- All databases must be configured to use the same authentication mode
- Users must have common credentials across databases

Unexpected label in websheet Scatter Chart

This issue occurs when label text in a Scatter Chart is edited to use customized/hardcoded text.

Instead of displaying the customized label text, the label displays "[x-value], [y-value]". X value and y value are the values for the data point as set in the range of the chart.

The highlighted label in this image illustrates the issue.



This issue will be corrected in an upcoming release.

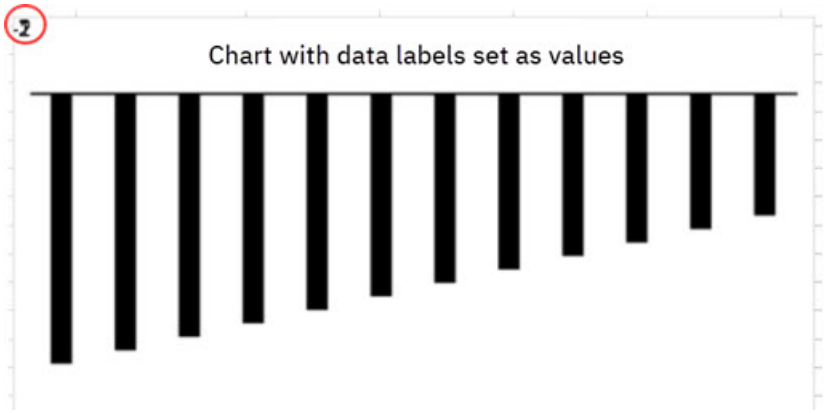
2.0.61 - Feature updates and known issues, February 9, 2021

IBM® Planning Analytics TM1 Web was refreshed on February 9, 2021 to include fixes only. There are no new features, but a known issue regarding label misalignment in charts is described here.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

Chart labels are misaligned in websheets

In the uncommon chart configuration where chart data labels are set as values in Excel, the labels are mispositioned in the corresponding TM1 Web websheet. The labels appear at the top left of the chart, with all labels superimposed, as in the following image.



This issue will be corrected in an upcoming release.

2.0.60 - Feature updates and known issues, December 17, 2020

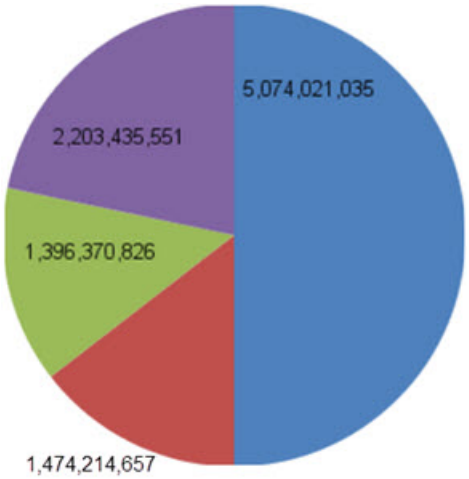
IBM® Planning Analytics TM1 Web was refreshed on December 17, 2020 to include fixes only. There are no new features, but a known issue regarding label misalignment in pie charts is described here.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

Pie chart labels are misaligned in websheets

Pie chart labels in TM1 Web websheets are sometimes misaligned in comparison to the chart labels in the source Excel spreadsheet.

In some cases, a segment label can appear outside of the segment to which it applies, as in the following example.



This issue will be corrected in an upcoming release.

2.0.59 - Feature updates, November 13, 2020

IBM® Planning Analytics TM1 Web was refreshed on November 13, 2020 to include fixes only.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

2.0.58 - Feature updates, October 20, 2020

IBM® Planning Analytics TM1 Web was refreshed on October 20, 2020 to include fixes only.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

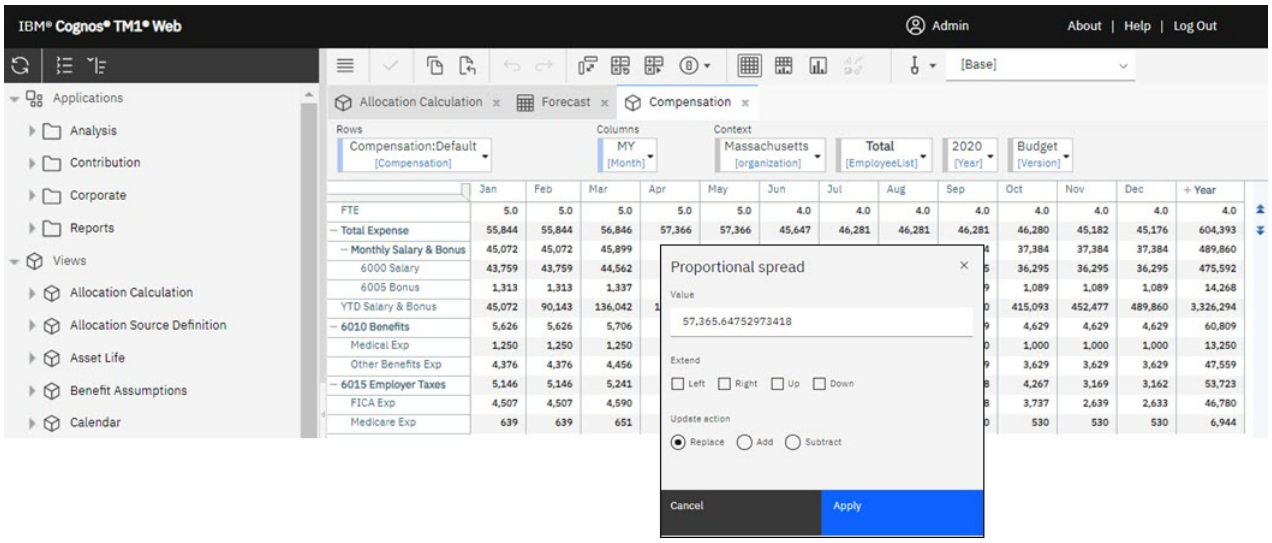
2.0.57 - Feature updates, September 21, 2020

IBM Planning Analytics TM1 Web was refreshed on September 21, 2020 to include the following updates.

New user experience

The TM1 Web user interface has been updated to provide a more consistent experience with other IBM products. A new login page and simplified icons throughout TM1 Web are the most prominent changes you'll notice.

Gestures, menu selections, and functionality remain unchanged. All existing websheets, views, and reports continue to work just as you'd expect.



Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

2.0.56 - Feature updates, August 12, 2020

IBM® Planning Analytics TM1 Web was refreshed on August 12, 2020 to include fixes only.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

2.0.55 - Feature updates, July 16, 2020

IBM Planning Analytics TM1 Web was refreshed on July 16, 2020 to include the following features and notices.

Updates to each version of TM1 Web are cumulative. To see what was new in the previous release, see Chapter 4, “What's new in TM1 Web,” on page 75.

New release schedule for TM1 Web

As of the 2.0.55 SC release of IBM Planning Analytics with Watson, new versions of TM1 Web will be released on a more frequent schedule. New versions will be available approximately once a month, similar to the release schedules of IBM Planning Analytics Workspace and IBM Planning Analytics for Microsoft Excel.

TM1 Web is no longer included in the 2.0.x LC releases of Planning Analytics.

New installer for TM1 Web

As of the 2.0.9.2 LC/2.0.55 SC releases of IBM Planning Analytics with Watson, TM1 Web is installed with the IBM Planning Analytics Spreadsheet Services installer. TM1 Web is no longer part of the web tier within the Planning Analytics Local installer.

For details on installing TM1 Web with the IBM Planning Analytics Spreadsheet Services installer, see Installing and configuring Planning Analytics TM1 Web.

2.0.9 - Feature updates, December 16, 2019

IBM Planning Analytics Local version 2.0.9 and the cloud-only release of IBM Planning Analytics with Watson version 2.0.9 includes the following updates for TM1 Web.

Use dynamic shapes and images in websheets

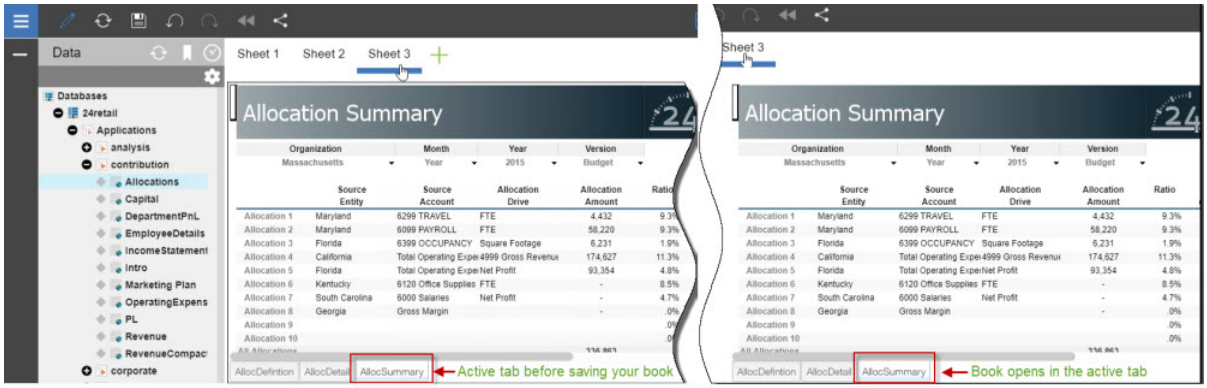
Customize your websheets! In TM1 Web, you can dynamically insert shapes and images anywhere in your websheet where you’d like the image to change when the value of a cell changes. You can dynamically insert logos, employee pictures, flags, product images, and more.

A dynamic image can be created by assigning a named range that contains an INDIRECT or INDEX-based formula to an image object. The formula resolves to a cell reference, and if an image is anchored to that cell, the dynamic shape reflects that image object's content.

To support this feature, TM1 Web persists the assigned formula, and when it recalculates, TM1 Web evaluates the named range formula to a cell reference. Using this cell reference, TM1 Web can then update the image object's file name to match the referenced image.

Open a websheet on the active tab when you save a multi-tab websheet

If you have a websheet with multiple tabs in a book, Planning Analytics Workspace keeps track of the active websheet tab when you save the book. Then, when you open the book in Planning Analytics Workspace later, you are right where you left off in your work!



Using Planning Analytics version 2.0.9 and Planning Analytics Workspace version 2.0.46, when you open a book with a websheet in Planning Analytics Workspace, the tab that you saved the websheet with is active.

Note: You must be using Planning Analytics Workspace on IBM Planning Analytics with Watson version 2.0.9 to take advantage of this feature of websheets in IBM Planning Analytics TM1 Web.

If you don't have Planning Analytics version 2.0.9, the default tab that the websheet was published with (using TM1 Perspectives or Planning Analytics for Microsoft Excel) is active when you open the book in Planning Analytics Workspace.

2.0.8 - Feature updates, June 21, 2019

IBM Planning Analytics Local version 2.0.8 and the cloud-only release of IBM Planning Analytics with Watson version 2.0.8 includes the following updates for TM1 Web.

Include user names and memory usage in TM1 Web logs

User names and memory usage are included in TM1 Web logs. This update makes it easy to see when a user runs an active form, workbook, or cube that renders too many rows. To turn on this optional logging, the logging level of `log4j.logger.com.ibm.cognos.tm1` must be set to DEBUG in the `\tm1_64\webapps\tm1web\WEB-INF\configuration\log4j.properties` file. You can review the audit logs and reduce the number of rows in the rendering.

The following information is included in logs:

- Timestamp
- Application and Active Form name
- Number of rows that were generated
- User name
- Current heap memory after the websheet renders

Example log when you open an active form

```
"<TIMESTAMP>:CLASSNAME:Constructed view for <ActiveFormViewid> contains <#> rows, by user
'<username>'.
<TIMESTAMP>:CLASSNAME:Current heap memory usage: <MB>".
```

Example log when you open a workbook

```
"<TIMESTAMP>:CLASSNAME:Creating WorkbookMetaData for <sheet name>, by user '<username>'.
<TIMESTAMP>:CLASSNAME:Current heap memory usage: <MB>".
```

Example log when you open a cube view

```
"<TIMESTAMP>:CLASSNAME:Exit from getUpdatedCubeViewData, updatedData: class name, username:
<username>.
<TIMESTAMP>:CLASSNAME:Current heap memory usage: <MB>".
```

Changes saved automatically in TM1 Application Web

In Planning Analytics version 2.0.8, the **Save** confirmation dialog box in IBM TM1 Application Web has been removed. When you close a view, you are not prompted to save changes. All data changes are saved automatically when you close the application. Your changes are available when you reopen the application. This change applies to all web browsers.

Configure login using TM1 Web URL API with Cognos Analytics security

In Planning Analytics version 2.0.8, a new parameter CSPHeaderFrameSource is available in the `tm1web_config.xml` file. If you use the TM1 Web URL API configured with integrated security mode 5 (Cognos Analytics security authentication), you must set this parameter to allow users to log in. This parameter controls security of the context that is loaded in the <frame> element, which is used by TM1 Web URL API. The CSPHeaderFrameSource parameter defines allowed sources for Content-Security-Policy (CSP) `frame-src` policy.

Syntax

```
<add key="CSPHeaderFrameSource" value="" />
```

If the CSPHeaderFrameSource is specified, it sets the allowed sources for the `frame-src` policy. If the value is left blank or the parameter is not set, the default value is '*', which allows content from all sources to load.

Remember: In IBM Planning Analytics Local version 2.0.8, you install a new version of the `tm1web_config.xml` file that is called `tm1web_config.xml.new` and your existing `tm1web_config.xml` file is preserved. To take advantage of fixes that are applied to this release, you must rename the `tm1web_config.xml.new` file to `tm1web_config.xml` and you must reapply any changes that you made to your previous configuration settings.

Example

```
<add key="CSPHeaderFrameSource" value="'self'" />
```

Sets the `frame-src` policy to 'self'.

Allows contents from the site's origin to load.

Example

```
<add key="CSPHeaderFrameSource" value="http://CAM_HOST:CAM_PORT http://
TM1WEB_HOST:TM1WEB_PORT" />
```

Sets the `frame-src` policy to http://CAM_HOST:CAM_PORT http://TM1WEB_HOST:TM1WEB_PORT.

Allows contents from CAM_HOST:PORT and TM1WEB_HOST:PORT to load.

What to do next

For more information on how to define sources for `frame-src`, see Sources on the MDN web docs site.

Relational data sources in TM1 Web websheets removed

Removed in v2.0.8 The ability to use relational data sources in TM1 Web has been removed from IBM Planning Analytics Local version 2.0.8. The IBM Data Server Driver for JDBC and SQLJ 4.17 (10.5.0.2) have also been removed from the installation kit (db2cc4.jar, ojdbc6.jar, sqlj4.zip, sqljdbc4.jar).

Planning Analytics version 2.0.7 was the last release with support for relational data sources in TM1 Web websheets.

2.0.7 - Feature updates, April 29, 2019

IBM Planning Analytics Local version 2.0.7 and the cloud-only release of IBM Planning Analytics with Watson version 2.0.7 includes the following updates for TM1 Web.

Load websheets faster in TM1 Web

To optimize loading of websheets in TM1 Web, you can set a new feature flag `OptimizeCssForHiddenContent`. The feature flag can be added in `tm1_64\webapps\tm1web\WEB-INF\configuration\features.json`.

When `OptimizeCssForHiddenContent` is set to `true`, CSS style information that comes from hidden content (sheets, rows, columns, cells, or controls) is excluded during websheet loading.

`OptimizeCssForHiddenContent` is set to `false` by default.

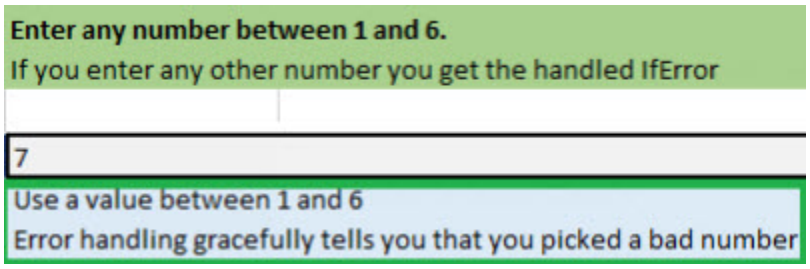
Example

```
{
    "NestedDbsEvaluation": false,
    "NewIrrAlgorithm": false ,
    "OptimizeCssForHiddenContent": true
}
```

Use the IFERROR Excel function in TM1 Web

IBM Planning Analytics TM1 Web now supports the use of the IFERROR function in websheets.

The IFERROR function traps errors in a formula and returns an alternative result, such as text, when an error is detected.



Take advantage of improved cell formatting in TM1 Web websheets

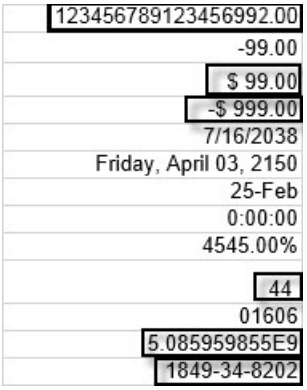
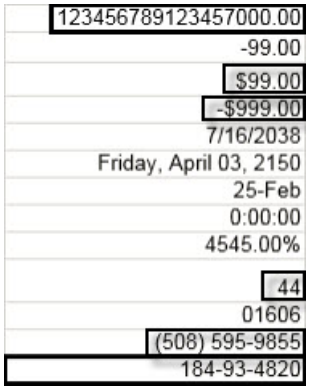
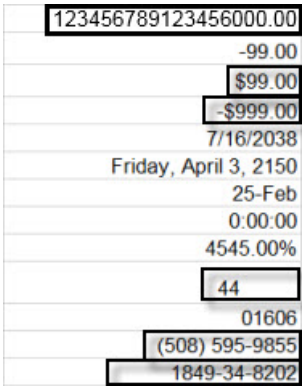
The cell formatting of currency, fractions, phone numbers, and social security numbers in TM1 Web websheets has improved.

The following changes have been made to formatting of cells in websheets:

- For numbers with more than 15 digits, cells in websheets round up the number to the first 15 digits. For example, "123456789123456992.00" appears as "123456789123457000.00". In Excel, only the first

15 digits are stored and remaining digits are replaced by zeros. For example, "123456789123456992.00" appears as "123456789123456000.00".

- Currency appears with no space after the $ sign. Negative currency also appears with no space after the dollar sign. For example, "$99.00" and "-$999.00".
- Fractions are formatted to appear in fraction format "# ??/??" with a space between the whole number and the fraction. When the number is a whole number, the cell is formatted without a space after the whole number.
- Phone numbers are formatted as "(nnn) nnn-nnnn" as in Excel.
- Social security numbers are formatted with the first 9 digits. Any digits that follow the first 9 digits are truncated. For example, "1849348202" appears as "184-93-4820" with the last digit "2" truncated. This formatting is different in Excel. For numbers with more than 9 digits, Excel adds the format to the last 9 digits while the additional digits at the beginning don't change. For example, in Excel, "1849348202" appears as "1849-34-8202".

TM1 Web version 2.0.6 or earlier	TM1 Web version 2.0.7 or later	Cell formatting in Excel
		

This cell formatting is enabled by default in TM1 Web websheets with the feature flag `NewDataFormatter`. The feature flag can be set in `tm1_64\webapps\tm1web\WEB-INF\configuration\features.json`.

Example

```
{
    "NestedDbsEvaluation": false,
    "NewIrrAlgorithm": false ,
    "NewDataFormatter": true
}
```

Check out updated TM1 Web configuration defaults

The following TM1 Web configuration parameters have new default settings. These settings were previously recommendations. They are now default settings in the `tm1web_config.xml` file for new installations of TM1 Web.

Note: Some default configuration parameter values for Planning Analytics on cloud are different than in Planning Analytics Local.

ExportCellsThreshold

Specifies the maximum number of cells that an export of a websheet or a cube view can contain.

Default changed from blank to 1000000.

MaximumConcurrentExports

Specifies the maximum number of concurrent exports that can be executed from TM1 Web.

The default value in Planning Analytics on cloud is set to 3. This default value is unchanged.

The default value in Planning Analytics Local is changed from 5 to 4.

MaximumSheetsForExport
Specifies the maximum number of sheets that are allowed to export.

Default changed from 100 to 50.

WorkbookMaxCellCount
Specifies the maximum cell count of a workbook as a number with no thousands separators.

Default changed from -1 to 500000.

For more information, see TM1 Web configuration parameters.

Deprecation of relational datasources in TM1 Web websheets

Deprecated Planning Analytics version 2.0.7 is the last release with support for relational datasources in TM1 Web websheets.

2.0.6 - Feature updates, October 11, 2018

IBM Planning Analytics Local version 2.0.6 and the cloud-only release of IBM Planning Analytics with Watson version 2.0.6 includes the following features for TM1 Web.

New parameter to configure session timeout for TM1 Web

In IBM Planning Analytics Local version 2.0.6, there is a new parameter in the `tm1web_config.xml` file called `HttpSessionTimeout`. This parameter defines the session timeout (in minutes) of the HTTP session for TM1 Web.

If the `HttpSessionTimeout` parameter is not specified (missing or blank), the value is less than 1 or not a numerical value, the default `session-timeout` that is defined in the `web.xml` file is used.

Important: As of IBM Planning Analytics Local version 2.0.6, you must not change the `session-timeout` value in the `web.xml` file.

Remember: In IBM Planning Analytics Local version 2.0.6, you install a new version of the `tm1web_config.xml` file that is called `tm1web_config.xml.new` and your existing `tm1web_config.xml` file is preserved. To take advantage of fixes that are applied to this release, you must rename the tm1web_config.xml.new file to tm1web_config.xml and you must reapply any changes that you made to your previous configuration settings.

2.0.5 - Feature updates, June 25, 2018

IBM Planning Analytics Local version 2.0.5 and the cloud-only release of IBM Planning Analytics with Watson version 2.0.5 includes the following features for TM1 Web.

Changes to `web.xml` file

If you are upgrading IBM Planning Analytics TM1 Web with this installation of IBM Planning Analytics Local version 2.0.5, you install a new version of the `web.xml` file called `web.xml.new` and your existing `web.xml` file is preserved.

To take advantage of fixes applied in this release, you must use the `web.xml.new` file and you must reapply any changes that you made to your previous configuration settings. In particular, restore your values for **`session-timeout`**.

1. Back up the existing `web.xml` file in `<PA_installation_location>/webapps/tm1web/WEB-INF`. For example, rename `web.xml` to `web.xml.old`. This step backs up your current settings.
2. Rename `web.xml.new` to `web.xml`. This step uses the new version of `web.xml` that is supplied with IBM Planning Analytics Local version 2.0.5.

3. Replace the entry for **session-timeout** in `web.xml` with the entry from `web.xml.old`. This step restores any changes that you made to this property previously.

   For example:

```
<session-config>
    <session-timeout>20</session-timeout>
</session-config>
```

Exporting to PDF

Exporting a websheet to PDF uses the print area information. If you define a print area in a worksheet, only the data in that area will be exported to PDF. This behavior is the same as printing from Excel.

2.0.3 - Feature updates, September 19, 2017

IBM Planning Analytics Local version 2.0.3 and the cloud-only release of IBM Planning Analytics with Watson version 2.0.3 includes the following features for TM1 Web.

Display the current TM1 database label in TM1 Web

The TM1DatabaseLabel parameter displays the TM1 database label in the banner beside the user name. For more information, see TM1DatabaseLabel Parameter and TM1 Web Configuration Parameters.

Specify the maximum cell count of a workbook

The WorkbookMaxCellCount parameter specifies the maximum cell count of a workbook as a number with no thousands separators. You can use WorkbookMaxCellCount to avoid issues opening workbooks with many cells.

For more information, see TM1 Web Configuration Parameters.

Limit the number of cells that can be exported from websheets

The ExportCellsThreshold parameter specifies the maximum number of cells that an export of a websheet or a cube view can contain. If the number of selected cells exceeds the threshold, a warning message is displayed and the export does not start.

For more information, see TM1 Web Configuration Parameters.

Hide dimensions in the cube viewer

The CubeViewerHiddenDimensionsEnabled parameter allows you to hide dimensions in the TM1 Web cube viewer.

For more information, see TM1 Web Configuration Parameters.

Waterfall chart support

TM1 Web supports excel-based Waterfall charts in websheets. These charts were released in Microsoft Excel 2016.

2.0.0 - Feature updates, December 16, 2016

IBM Planning Analytics Local version 2.0.0 includes all features that were introduced in TM1 Web 10.3.0, which was introduced for IBM Planning Analytics on Cloud.

The following features were introduced in IBM Planning Analytics Local version 2.0.0. For more information about these features, see the *TM1 Web* documentation in IBM Knowledge Center.

Hierarchies in TM1 Web

TM1 websheets can display more than one hierarchy in a dimension.

Note: Hierarchies can be viewed in TM1 Web, however, you cannot create hierarchies in TM1 Web. You must create hierarchies in Planning Analytics Workspace. For more information, see Planning Analytics Workspace in IBM Knowledge Center.

You can open hierarchies by using Quick Reports in IBM Planning Analytics for Microsoft Excel.

Quick Reports (formerly Flex Views) are published as live websheets. A live websheet maintains its connection to the TM1 server. If the data on the server changes, the live websheet reflects the change.

For more information about Quick Reports, see Planning Analytics for Microsoft Excel in IBM Knowledge Center.

Note: Relative proportional spreading and relative percent adjustments are not supported in Quick Reports that are opened in TM1 Web.

TM1 Web API enhancements

The TM1 Web API has the following new functionality:

- As of IBM Planning Analytics Local version 2.0.0, it is no longer mandatory to use the version of Dojo that is provided with TM1 Web to load the TM1 Web JavaScript Library modules. TM1 Web now supports using the AMD loader from Dojo version 1.7 and later to load the JavaScript Library modules.
- The HTML <head> and <body> tags that are required to use the JavaScript library are simpler.
- The `tm1web/api/session/session` module in the JavaScript library allows users to log in, retrieve session information based on a session token, and destroy a session based on a session token.
- The `tm1web/api/session/LoginDialog` module in the JavaScript library allows users to display or destroy a login dialog box.
- The `tm1web/api/Workbook` class in the JavaScript library exposes execution information after an action button is executed. The `onActionButtonExecution` method API allows users to replace an existing Workbook or create a new one when an action button is clicked.
- The `tm1web/api/Workbook` class and the `tm1web/api/CubeViewer` class include `subset` and `subsets` set properties and methods.

For more information, see *TM1 Web API* in the *TM1 for Developers* documentation.

Relational websheets

TM1 Web now allows you to view relational data on the same websheet as TM1 data. By defining a relational query in an Excel file and then uploading the file to TM1 Web, you can view the results on the same websheet or tab. This allows you to report on OLAP and relational data together.

For more information, see Working with relational data in websheets (https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_ug.2.0.0.doc/c_relational_data_websheets.html) in IBM Knowledge Center.

TM1 Web Accessibility

TM1 Web includes accessibility features to help you perform tasks by using only a keyboard. These features include keyboard navigation and keyboard access to menus and dialog boxes that are related to websheets.

- Context menus are accessed by using Shift+F10. The Up Arrow and Down Arrow keys select items from within the context menu.
- To expand or collapse a row in a websheet, you can use the Space bar.

- To access the set selector, you can use the Space bar. The Tab key moves you between the search, the Arrow keys, and the tree. Up Arrow and Down Arrow keys move you between items in the tree. The Enter key selects the focused item in the tree.

Note: When you access the set selector, if you press Esc to exit after you make changes, you lose your focus on the cell that you originally launched from. You are focused on the main page.

Support for Excel shapes in workbooks

Excel shapes, including basic shapes, arrows, banners, equation shapes, and lines, can be added to workbooks in TM1 Web. To see the list of supported and unsupported Excel shapes, see the List of Microsoft Excel-supported functionality by menu in IBM TM1 Web version 10.2.2 and later.

Single sign-on for TM1 Web

You can configure single sign-on for IBM TM1 Web by using Integrated Login (Kerberos) and the application server's security layer. Single sign-on enables HTTP users to log in only once to TM1 Web.

For more information, see *Configuring Integrated Login for TM1 Web using Kerberos and SPNEGO* in the *Planning Analytics Installation and Configuration* documentation.

TM1 worksheet functions

The following worksheet functions are now available:

TM1ELLIST
Returns a set of element values from a TM1 model by using a single formula.

TM1GLOBALSANDBOX
Returns the current global active sandbox that was selected from the toolbar.

TM1INFO
Returns information about the current TM1 version and client.

TM1PRIMARYDB
Returns the primary TM1 server name that the user is authenticated through, even if the user is implicitly logged in to multiple TM1 servers.

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