Cloud Migration Planning

TM1 10.2 or Planning Analytics Local to Planning Analytics on Cloud

Cloud Migration Planning

Program Overview & Goals

Meeting 1	Meeting 2	Meeting 3 & 4
❑ 1 hour web meeting ❑ Overview: Planning Analytics on Cloud Onboarding	❑ 1 hour web meeting ❑ Overview: Planning for Cloud Migration	❑ Optional ❑ 1 hour web meeting ❑ Q&A

Program Overview

- Planning Analytics on Cloud Onboarding
- Differences between TM1 and Planning Analytics
- Differences between Planning Analytics Local and Planning Analytics on Cloud
- Highlights of Planning Analytics Workspace & Planning Analytics for Excel
- Migration check list

Program Goals

- Quickly get started with migration planning
- Implement migration best practices
- Successful migration

Planning Analytics and TM1

Planning Analytics encompasses the entire product offering that includes:

- TM1 Server
- TM1 Web
- PA Workspace
- PA for Excel (replacing CAFÉ)
- and other legacy interfaces

PA introduces improved methods and tools, but all existing TM1 sheets and applications will function in PA as is with no additional effort

PA follows the version scheme of 2.0.x with a quarterly release cycle

PA Workspace and PA for Excel follow the version scheme of 2.0.xx with 4-6 weeks of release cycle

Product	TM1 10.2.x	PA Cloud	Additional Information
TM1 Server	x	x	Core database engine
TM1 Perspectives	x	x	Legacy Excel add-in Most functionality is in PA for Excel
CAFE	x		Replaced with PA for Excel
TM1 Web	x	x	New look, faster and improved stability
TM1 Applications	x	x	
TM1 Mobile Contributor	x		Not supported in PA Local
Operation Console	x		Replaced with PAA (Planning Analytics Administration)
Planning Analytics Workspace		x	New web based interface
Planning Analytics for Excel		x	New Excel add-in
Cognos Command Center		x	Task orchestration
Cognos Integration Server		x	Automate data extraction

Difference between Planning Analytics Local and Cloud

Feature	Local	Cloud
Workspace	Yes	Yes
Planning Analytics for Excel	Yes	Yes
Perspectives	Yes	Only for Modelers
Insight	Yes (Dist mode dropped in 2.0.6)	No
Includes restricted CCC and CIS	Yes	Yes
Includes CA restricted to PA data sources	Yes	Optional Extra
Security	Native TM1, Legacy Active Directory, CAM	IBMID with Federation option
Memory	Up to 2TB	Up to 2TB

Planning Analytics Workspace

New web-based interface for Planning Analytics

Covers functionalities (replacing legacy clients)
- Write back and reporting (TM1Web)
- Administration (Architect)
- Modeling (Architect, Performance Modeler)
- Monitoring (Operation Console)
- Work with websheets (TM1Web)
- Create visualizations and dashboards
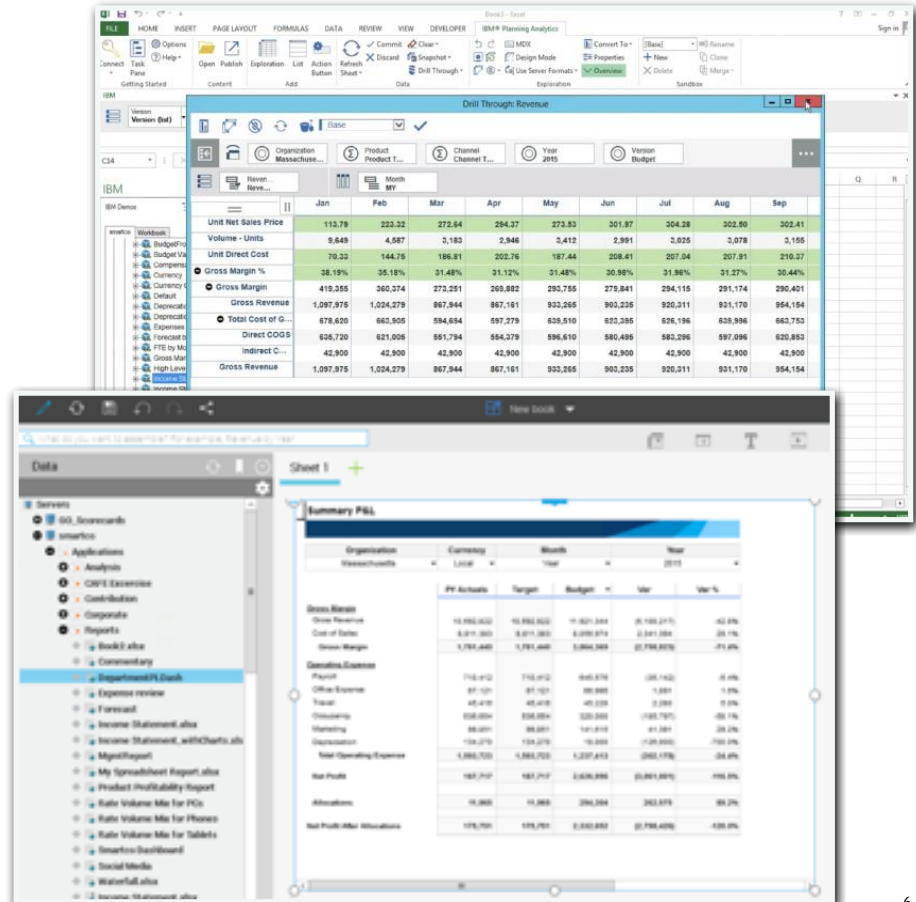- Use snap commands
- Hierarchies for more flexible modeling

Planning Analytics for Excel

New Microsoft Excel add-in for TM1 database replacing CAFÉ.

- Superior performance over WAN driven by REST API meaning no Citrix needed
- Shares components with PA Workspace
- TM1 functions based reports, Active Forms and Flex Views
- Publishes reports to TM1 Web and PA Workspace as websheets
- Support new Hierarchies features

Four different report types

- Exploration - slice/dice/pivot analysis
- Quick Reports - fast worksheet design
- Dynamic Reports - row interactivity (zero suppression, expand, collapse)
- Custom Reports - highly formatted forms and reports

Sample Project Phases

Assess	Onboard	Migrate	Configure	Go Live

Assess

- ☐ Identify stakeholders
- ☐ Create project plan
- ☐ Create testing specification
- ☐ Set go live date

Determine

- ☐ Data Connection requirements (Secure Gateway)
- ☐ Authentication method (IBM ID or Federated)
- ☐ Required firewall changes (Secure Gateway, FTPS/SFTP)
- ☐ PA for Excel to install
- ☐ Distribution method of PA for Excel to users (manual, remote)

Onboard

- ☐ Complete Onboarding session/checklist
- ☐ Accept primary user invitation
- ☐ Confirm connectivity to Cloud environments
- ☐ Invite additional 'Admin' users
- ☐ Enable federation*
- ☐ Install Secure Gateway client*
- ☐ Configure ODBC connections*
- ☐ Request additional TM1 instance(s) via IBM Support

Migrate

On Prem
- ☐ Disable chores
- ☐ Stop TM1 database
- ☐ Compress all directories (excluding logs)
- ☐ Transfer to Cloud (FTPS, SFTP or copy/paste)

Cloud
- ☐ Uncompress directories in target environment
- ☐ Modify tm1s.cfg for any specific on-prem settings
- ☐ Modify hardcoded paths in TI processes to reflect cloud locations
- ☐ Start TM1 database
- ☐ Enable chores

Configure

Security
- ☐ Invite users and confirm invitation acceptance
- ☐ Assign appropriate security to TM1 database(s)

PA for Excel
- ☐ Install PA for Excel on user PCs
- ☐ Add connections to target TM1 databases
- ☐ Modify the config as needed

Go Live

Validate
- ☐ Functional test
- ☐ Performance test
- ☐ User Acceptance test

Cut Over

Go Live

*Optional

Additional Help

Contact IBM Support: https://www.ibm.com/mysupport