IBM Cognos Planning

Version 10.1.0

New Features Guide

Product Information

This document applies to IBM Cognos Planning version 10.1.0 and may also apply to subsequent releases. To check for newer versions of this document, visit the IBM Cognos Information Centers (http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp).

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Introduction

This document provides an organized view of the new features of IBM® Cognos® Planning. For more information about new and changed features, see the specific product user guide.

IBM® Cognos® Planning provides the ability to plan, budget, and forecast in a collaborative, secure manner. The major components are Analyst and Contributor.

IBM Cognos Planning Analyst

IBM® Cognos® Planning Analyst is a flexible tool used by financial specialists to define their business models. These models include the drivers and content required for planning, budgeting, and forecasting. The models can then be distributed to managers using the Web-based architecture of IBM Cognos Planning Contributor.

IBM Cognos Planning Contributor

IBM® Cognos® Planning Contributor streamlines data collection and workflow management. It eliminates the problems of errors, version control, and timeliness that are characteristic of a planning system solely based on spreadsheets. Users have the option to submit information simultaneously through a simple Web or Microsoft® Excel interface. Using an intranet or secure Internet connection, users review only what they need to review and add data where they are authorized.

For more information about using this product, visit the IBM Cognos Customer Center (www.ibm.com/software/data/support/cognos_crc.html).

IBM Cognos Innovation Center

The IBM® Cognos® Innovation Center for Performance Management provides a forum and Performance Blueprints that you can use to discover new ideas and solutions for finance and performance management issues. Blueprints are pre-defined data, process, and policy models that incorporate best practice knowledge from customers and the Cognos Innovation Center. These Blueprints are free of charge to existing customers or Platinum and Gold partners. For more information about the Cognos Innovation Center or the Performance Blueprints, visit www.ibm.com/software/data/cognos/innovation-center/

Audience

To use this guide, you should have an understanding of IBM Cognos Planning Contributor and IBM Cognos Planning Analyst.

Finding information

To find IBM® Cognos® product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers at http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp. Updates to Release Notes are published directly to Information Centers.

You can also read PDF versions of the product release notes and installation guides directly from IBM Cognos product disks.

Accessibility features

To accommodate the largest number of users, we focus our accessibility support on plan contributors. IBM® Cognos® Planning provides accessible capabilities through the use of the Contributor Add-in for Microsoft® Excel component. While using Contributor Add-in for Microsoft Excel, plan users work in an Excel environment and can use the accessibility capabilities of Microsoft Excel. For details about accessibility in Microsoft Excel, go to the Microsoft Web site and search for "Voluntary Product Accessibility Template for Excel."

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.

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Chapter 1: IBM Cognos Planning new and changed features

The following new and changed features are included in this version of IBM® Cognos® Planning.

This version provides significant scalability and performance improvements and better use of computer hardware resources. Additionally, there is improved reconciliation performance and better workload management. There are also lower and more predictable storage volumes, improved job system resilience, optimized publish processes, and optimized datatypes.

Contributor Administration Console has been renamed to IBM Cognos Planning Administrator in this release.

These improvements are found in IBM Cognos Planning Contributor Web Client, the macro system, IBM Cognos Planning Administrator, the engine and runtime, the publishing process and the way databases are used, and the job system.

Contributor Web Client improvements

The IBM® Cognos® Planning Contributor Web Client has new and changed features in this release. For more information, see the IBM Cognos Planning Contributor *Administration Guide* and the IBM Cognos Planning Contributor Web Client *User Guide*.

Provisioning improvements

Provisioning has been improved so that you can now have automatic updates of rich client components from a secured Web server using the Rich Client Provisioning Agent. You can now also can have better control over updates. If the ability to update is enabled in IBM® Cognos® Planning Administrator, the provisioning agent downloads and installs necessary updates as they become available after the initial installation of a component. It is now also possible to have updates switched on without the initial platform installation automatically being downloaded. You can control system-wide provisioning options from Planning Administrator.

Quick sums in the grid

You can now see the sum of values contained in cells that you select in Contributor Web Client. The sum appears in the status bar at the bottom of the window. This saves time when you want to quickly see the sum of values.

Contributor Web Classic Client removal

IBM® Cognos® Planning Contributor Web Classic Client has been removed from the product in this release. Use IBM Cognos Planning Contributor Web Client or IBM Cognos Planning Contributor Add-in for Microsoft® Excel to make data contributions.

Significant performance improvements on the Workflow page

On the Workflow page in IBM® Cognos® Planning Contributor Web Client, only the first 50 contribution nodes are displayed when you first view the page. You can then choose to see more contribution nodes as needed. Additionally, the tree of contribution nodes is built on demand instead of when you first view the Workflow page. These and other improvements mean that there will be significant performance improvements on the Workflow page.

Significant performance improvements in the Contributor Web Client grid

Performance has been improved in large models with sparse access, applications with long e-lists, and complex models with many links targeting a central cube.

You will also see improved performance if you have access to many nodes or if you regularly open high-level aggregate or review nodes.

Additionally, there is improved performance when you import data from or export data to Microsoft® Excel.

Macro system improvements

The macro system in IBM® Cognos® Planning Contributor has new and changed features in this release. For more information, see the IBM Cognos Planning Contributor *Administration Guide*.

Running macros in parallel

You can now run macros in parallel when you have a master macro that starts independent operations where processes or results do not depend on each other. This may improve the use of server resources. For example, if you have two groups of applications which are independent but each has its own process and both are monitored by a shared cluster, consider running the macros in parallel.

Starting or restarting a macro at a specific step

You can now start or re-start the execution of a macro at a specific step, rather than just from the beginning. This provides more flexibility and saves time when running macros.

New Model Doctor macro

You can now run a new macro called Model Doctor that configures and runs the Contributor Model Review Tool as a macro step. The output of the Model Doctor macro is an HTML report that contains a list of certain noteworthy attributes of the model it was run against. This makes it easier to find trouble spots in your model and to review its overall performance.

IBM Cognos Planning Administrator improvements

The Contributor Administration Console has been renamed to IBM® Cognos® Planning Administrator in this release. It has new and changed features in this release. For more information, see the IBM® Cognos® Planning Contributor *Administration Guide*.

Previewing nodes using the Contributor Web client

The IBM® Cognos® Planning Contributor Web client is now used instead of the Contributor Classic Client to preview a node in IBM Cognos Planning Administrator in either development or production. As a result, you now can have multiple preview sessions open at the same time, including multiple previews of the same node.

Access blocks replace cut-down models

Access blocks replace and improve upon cut-down models. Access blocks are small and provide faster processing. They are reconciled only when necessary and only for nodes that have changed. As often as possible, access blocks are shared between nodes, which reduces disk space requirements. For example, if possible, access blocks are shared across versions of an application and along the e.List.

Using Scheduler Credentials during the package creation and update processes in the Go to Production process

The process of creating and updating packages as part of the Go to Production process now runs using the Scheduler Credentials account. This prevents package updates from failing when they are run by a user who does not have Planning Administration privileges. This means that you only have to manage one account to perform these major functions.

Engine and runtime improvements

The performance of the engine and the performance at runtime in IBM® Cognos® Planning Contributor has improved in this release. For more information, see the IBM Cognos Planning Contributor *Administration Guide*.

New lighter runtime model definition

A new runtime model is now created as part of the Go to Production process. The new runtime model only contains the information necessary to work with the model in the IBM® Cognos® Planning Contributor Web client. This will decrease the size of model downloads to the Web client. You can use the new runtime model in combination with any set of access, data, and commentary blocks to work with any node in the model.

Controlling node access improved

Access to nodes is now controlled by access blocks. An access block is a node-specific definition that contains just the cell-level access pattern to apply for a given node. Access blocks are significantly smaller than the corresponding node-specific model definition. They only contain cell-level access information, which means that they only are regenerated when there are changes to access information. Because the same access pattern is often shared between nodes, the same physical access block is also shared between nodes. This reduces the space required to store the access blocks on the server.

Cache management in Planning Service improved

The Planning Service now has improved cache management. As a result, the memory footprint for the Planning Server is reduced. There will also be performance improvements in circumstances where the memory is fragmented on the computer running the Planning Service, because the size of the objects being cached is now smaller.

Running the Planning Service as a non-administrative account or as a network service account

You can now run the Planning Service under accounts that do not have Administrator privileges in Microsoft® Windows®. You can now also use accounts that do not have Administrator privileges or are network service accounts. This allows you to have more robust security on computers running IBM® Cognos® Planning.

Aggregating data more efficiently

Data is now aggregated more efficiently. This will result in the reduction of memory used and provide better compression of the data during the Reconcile - Data aggregation phase.

Work performed is more proportional to changes made

You now can change a model many times, revert some of the changes, and save it without having to reconcile the model. Model reconciliation is now performed during the Go to Publish process. The set of contribution nodes that need to be reconciled may be smaller than in previous versions of IBM Cognos Planning because of a new model analysis process.

Unchanged admin links do not affect incremental publish

Running an admin link with no changes no longer causes an incremental publish to be exported again. This will save time and computing resources when you run an admin link.

Publishing and database improvements

The publishing process has new and changed features in this release. Additionally, there is an improvement in the way datatypes are used in IBM® DB2® databases. For more information, see the IBM Cognos® Planning Contributor *Administration Guide*.

Performance when you publish improved

A new process is available that improve performance when you publish. The new **Publish Tidy** process automatically deletes old data after you run the **Go To Production** process. You can also start it manually from the **Incremental Publish** dialog box in IBM® Cognos® Planning Administrator.

Running a Table Publish without a dimension

You can now choose 'none' as the dimension for publish for each cube when running a Table Publish. Because no dimension is published, you no longer need to take into consideration the maximum number of database columns allowed by your database when running a Table Publish.

Annotations and Attached Document tables do not use a dimension for Publish

Annotation and Attached Document tables no longer use a dimension for Publish. Only a set number of columns will be created in either the Annotation or Attached Document tables, regardless of whether or not you choose a dimension for Publish.

New views added to the Publish Tables schema

Two new view types have been added to Table Publish: the evn_* and avn_* views. These views are equivalent to the ev_* and av_* views for a View Publish. These new views make it easier to correlate objects between View Publish and Table Publish.

The evn_* view provides a user-friendly view of an export (et_*) table. The avn_* view provides a user-friendly view of an annotation (an_*) table. In both views, the dimension and dimension item names are displayed instead of the dimension and dimension item iids.

Using more efficient datatypes in IBM DB2 for text

The amount of storage used for a publish in an IBM® DB2® database for columns associated with textual data, annotations, and d-list lookup formatted items has changed, which saves space in your DB2 database. These three types of data now have their own datatypes.

Job system improvements

The job system has new and changed features in this release. For more information, see the IBM® Cognos® Planning Contributor *Administration Guide*.

Processing multiple jobs more efficiently as they reach the Job_End phase

As a job nears the Job_End phase, job tasks are now marked as complete and are freed up as they become available. If the jobs are processed on a cluster with four or more processors, a new job can start while the first one finishes. This improves the overall processing time of multiple jobs.

Retrying job items that fail automatically

If a failure occurs for a job item, the job system now automatically tries to run that job item again, up to a maximum of three times. In previous versions of IBM® Cognos® Planning, as soon as a failure was detected in any job item, the entire job would stop.

Switching jobs more efficiently

While job threads are active on a given job, they now evaluate which jobs need more processing applied to them. They switch to jobs that are running on fewer than four processors. This allows for a better distribution of work so that, for example, small, fast jobs are not queued behind long jobs.

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