

January 2022

Personalizing IBM Planning Analytics (*TM1*)

Setting up a Custom TM1 View

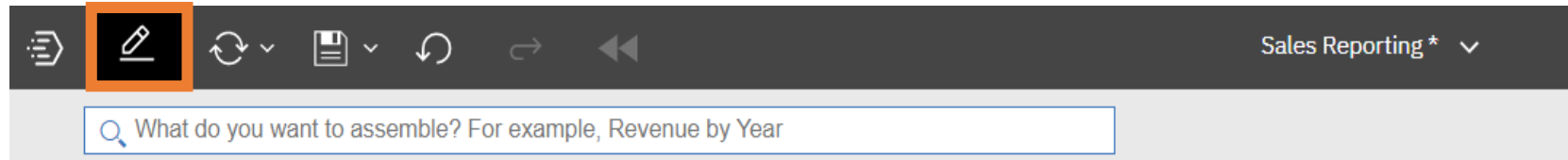
EMEA Sales Operations Team

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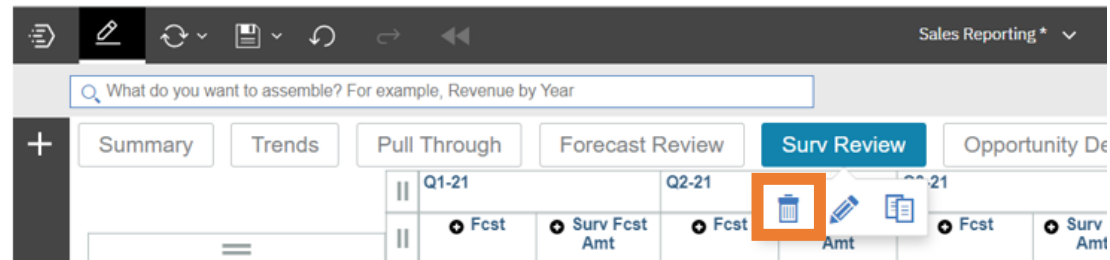
TM1 Custom Views

Although TM1 provides standardized reporting, users also have the ability to set up their own custom view.

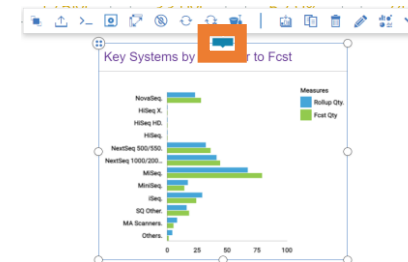
Customizable views are available on both *Sales Forecasting* and *Sales Reporting* books using the **Pencil Icon** on the upper left-hand corner:



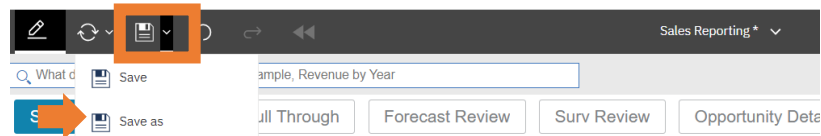
- While on **Edit Mode**, users can completely remove a tab that is not useful for them
 - Select the tab and click the Delete icon



- Or they can restructure a page by moving or resizing tables/graphs & by removing objects
 - Select the object of your interest and click on the blue box to activate the tool bar:



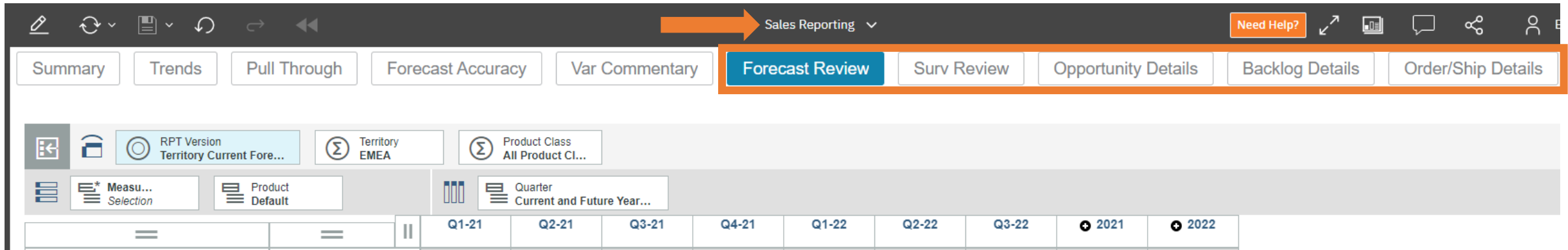
- Before closing the book, click on '**Save as**' button to save the modified view in your personal folder:



TM1 Custom Tables

The ability to customize tables is available on the following tabs in Sales Reporting:

- Forecast Review
- Opportunity Details
- Backlog Details
- Order/Ship Details



Overview of a Custom Table

Each of the views work similar to a Pivot table where you have:

- **Filters:** Use to filter your calculations or summary

Example: Product Class, Territory, Forecast Version

- **Columns:** The unique values displayed across the top row of the table

Example: Years, Quarters, Forecast Version

- **Rows:** The unique values displayed in the first column

Example: Territory Name, Product, Line of Business, etc.

- **Values:** Sum of all measures

Example: Shipment and Order Forecast Entry amount, Actuals, etc.

Filters

Columns

Rows

Values

RPT Version
Territory Current Fore...

Territory
EMEA

Product Class
All Product Cl...

Measu...
Selection

Product
Default

Quarter
Current and Future Year...

		Q1-21	Q2-21	Q3-21	Q4-21	Q1-22	Q2-22	Q3-22	2021	2022
+ Shipment Net Amt	- All Products	\$307,580,867	\$318,432,574	\$312,866,228	\$364,125,979	\$321,966,381	\$330,895,131	\$342,142,890	\$1,303,005,...	\$1,412,142,...
	+ Sequencing	\$285,471,849	\$298,580,580	\$291,302,226	\$338,107,674	\$300,648,547	\$308,751,603	\$318,808,551	\$1,213,462,...	\$1,312,620,...
	+ MicroArray	\$22,109,018	\$19,851,994	\$21,564,002	\$26,018,304	\$21,317,834	\$22,143,528	\$23,334,339	\$89,543,318	\$99,522,050
+ Order Net Amt	- All Products	\$441,063,714	\$331,335,409	\$309,132,248	\$286,902,472	\$290,687,420	\$297,406,668	\$299,210,083	\$1,368,433,...	\$1,256,022,...
	+ Sequencing	\$425,017,906	\$304,545,927	\$291,644,053	\$270,056,913	\$274,368,236	\$280,688,483	\$282,154,340	\$1,291,264,...	\$1,181,281,...
	+ MicroArray	\$16,045,808	\$26,789,482	\$17,488,195	\$16,845,559	\$16,319,184	\$16,718,185	\$17,055,743	\$77,169,044	\$74,741,357

Setting Up a Custom Table

1. Confirm your Filters, Columns, Values and Rows

Drag the dimension boxes to organize your view

For example, moving RPT Version from the top section (filters) to the right column area, will make RPT Version a column instead of a filter

Summary

Trends

Pull Through

Forecast Accuracy

Var Commentary

Forecast Review

Surv Review

Opportunity Details

Bac

RPT Version
Territory Current Fore...

Territory
EMEA

Product Class
All Product Cl...

Measu...
Selection

Product
Default

Quarter
Current and Future Year...

RPT Version
Territory Current Fore...

		Q1-21	Q2-21	Q3-21	Q4-21	Q1-22	Q2-22	Q3-22	2021	2022
Shipment Net Amt	All Products	\$307,580,867	\$318,432,574	\$312,866,228	\$364,125,979	\$321,966,381	\$330,895,131	\$342,142,890	\$1,303,005,...	\$1,412,142,...
	Sequencing	\$285,471,849	\$298,580,580	\$291,302,226	\$338,107,674	\$300,648,547	\$308,751,603	\$318,808,551	\$1,213,462,...	\$1,312,620,...
	MicroArray	\$22,109,018	\$19,851,994	\$21,564,002	\$26,018,304	\$21,317,834	\$22,143,528	\$23,334,339	\$89,543,318	\$99,522,050
Order Net Amt	All Products	\$441,063,714	\$331,335,409	\$309,132,248	\$286,902,472	\$290,687,420	\$297,406,668	\$299,210,083	\$1,368,433,...	\$1,256,022,...
	Sequencing	\$425,017,906	\$304,545,927	\$291,644,053	\$270,056,913	\$274,368,236	\$280,688,483	\$282,154,340	\$1,291,264,...	\$1,181,281,...
	MicroArray	\$16,045,808	\$26,789,482	\$17,488,195	\$16,845,559	\$16,319,184	\$16,718,185	\$17,055,743	\$77,169,044	\$74,741,357

Territory
EMEA

Product Class
All Product Cl...

Measu...
Selection

Product
Default

Quarter
Current and Future Year...

RPT Version
Territory Current Fcst ...

		Q1-21	Q2-21	Q3-21	Q4-21	Q1-22	Q2-22	Q3-22	2021	2022
Shipment Net Amt	All Products	\$307,580,867	\$318,432,574	\$312,866,228	\$364,190,364	\$321,781,381	\$330,906,131	\$342,249,890	\$1,303,070,...	\$1,413,055,...
	Sequencing	\$285,471,849	\$298,580,580	\$291,302,226	\$338,172,059	\$300,463,547	\$308,762,603	\$318,915,551	\$1,213,526,...	\$1,313,533,...
	MicroArray	\$22,109,018	\$19,851,994	\$21,564,002	\$26,018,304	\$21,317,834	\$22,143,528	\$23,334,339	\$89,543,318	\$99,522,050
Order Net Amt	All Products	\$441,063,714	\$331,335,409	\$309,132,248	\$286,738,472	\$290,494,420	\$297,409,668	\$299,309,083	\$1,368,269,...	\$1,256,909,...
	Sequencing	\$425,017,906	\$304,545,927	\$291,644,053	\$269,892,913	\$274,175,236	\$280,691,483	\$282,253,340	\$1,291,100,...	\$1,182,168,...
	MicroArray	\$16,045,808	\$26,789,482	\$17,488,195	\$16,845,559	\$16,319,184	\$16,718,185	\$17,055,743	\$77,169,044	\$74,741,357

2. Modify your set

- Click on a **dimension** you would like to expand
- Click on the **pencil icon** to open up the set
- Review** the sets and select the once you would like to view
- Once selected, double click or click on the arrow icon to bring it over to the **Current set**
- Apply and Close**

a

		Q1-21	Q2-21	Q3-21
Shipment Net Amt	All Products	\$307,580,867	\$318,432,574	\$312,8
	Sequencing	\$285,471,849	\$298,580,580	\$291,3
	MicroArray	\$22,109,018	\$19,851,994	\$21,5
Order Net Amt	All Products	\$441,063,714	\$331,335,409	\$309,1
	Sequencing	\$425,017,906	\$304,545,927	\$291,6
	MicroArray	\$16,045,808	\$26,789,482	\$17,4

b

Shipment Net Amt		\$307,580,867
		\$285,471,849
		\$22,109,018
Order Net Amt		\$441,063,714
		\$425,017,906
	MicroArray	\$16,045,808

c-e

Dimension: RPT Version

Available members:



- Territory FY22 Budget V2 10.21.21
- Territory FY22 Budget V3 11.10.21
- Territory 4Q M3 12.03.21 (A)
- 20214 Qtr End
- Top Down Versions
 - GM Current Forecast
 - GM 1Q M1 01.10.18
 - GM M3 Q2 06.05.18
 - GM 4Q M3 12.20.2019 (A)
 - GM 2021 V3 10.28.20 (A)
 - GM V3 12.04.20 (A)
 - GM M1 1.11.21(A)

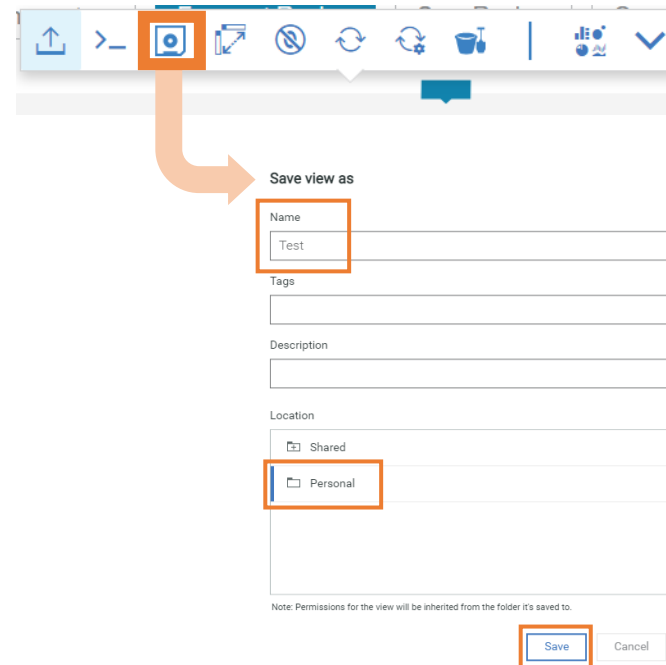
Current set:

- Members (Territory Current Fcst PAW)
- Territory Current Forecast

Buttons: Replace and close, Save..., Apply and close, Close

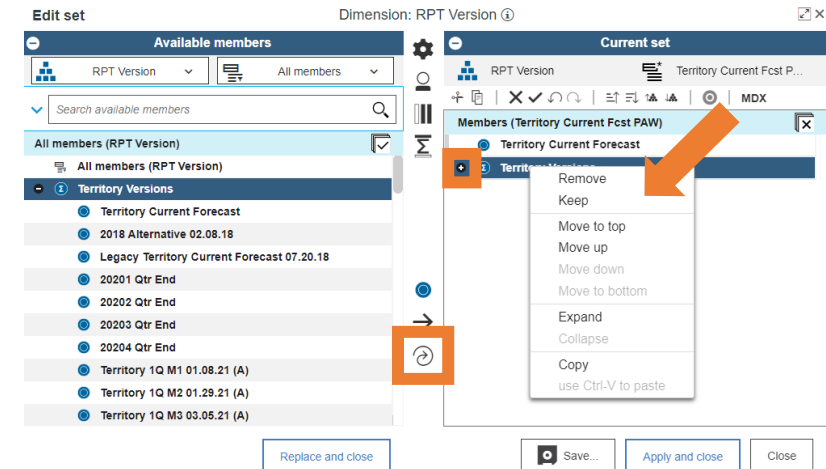
3. Save your custom view

- Click on blue comment icon  to get list of view options
- Click on the 'Save view as' icon 
- Pop up box for Save Criteria will appear
- Name your view
- Save in your Personal Folder (Location)



Tips and Tricks

- **Clear Sets with 1 click:** When editing a set, click on the swirl icon to clear all selections on the right
- **Moving the order of your Sets:** On the right-hand side, modify the order by clicking on the header
- **Click on the + icon:** It allows you to expand a set
- **Expand in one click:** Right click on dimension and select 'Expand to Level' (select level)
- **Keep and Hide:** Right click on dimension to activate 'Keep Only' or 'Hide a row/column'
- **Summarize All:** If you modify a set and want a summary of the selection, right click and select 'Summarize All'. This will create a new row with a sum of the row values



		Q1-21	Q2-21	Q3-21	Q4-21	Q1-22	Q2-22	Q3-22	2021	2022
Shipment Net Amt	Sequencing	\$285,471,849	\$298,580,580	\$291,302,226	\$338,158,059	\$300,360,707	\$308,772,603	\$318,884,151	\$1,213,512,...	\$1,313,417,...
	MicroArray	\$22,109,018	\$19,851,994	\$21,564,002	\$26,028,336	\$21,308,359	\$22,134,053	\$23,358,614	\$89,553,350	\$99,551,650
	Sum (all)	307,580,86...	318,432,57...	312,866,22...	364,186,39...	321,669,06...	330,906,65...	342,242,76...	1,303,066,0...	1,412,969,2...
Order Net Amt	Sequencing	\$425,017,906	\$304,545,927	\$291,644,053	\$269,888,913	\$274,072,396	\$280,701,483	\$282,221,940	\$1,291,096,...	\$1,181,987,...
	MicroArray	\$16,045,808	\$26,789,482	\$17,488,195	\$16,852,383	\$16,309,674	\$16,708,675	\$17,079,983	\$77,175,868	\$74,770,817
	Sum (all)	441,063,71...	331,335,40...	309,132,24...	286,741,29...	290,382,06...	297,410,15...	299,301,92...	1,368,272,6...	1,256,758,6...

Creating a Calculated Field

- Click on the two dimensions that you would like to calculate
- Right click and select 'Create Calculation'
- Name your Calculation
- Select your 'Calculation Type'

- Look across the common values
- Arithmetic
- Percentage

Tip: If doing a % change formula, select the later QTR first to calculate for example, Q3-21 % change of Q2-21

- Make selection and click 'Ok'
- This will create a new column or row
- Move the position of your calculation by editing the set and right click on, for example, 'Move to Top'

The screenshot shows a data table with columns for 2021 and 2022. A right-click context menu is open over the 2022 column. The menu includes options like Copy, Paste, Keep, Hide, Unhide all, Drill down, Drill up, View all, Expand to level, Sort ascending, Sort descending, Clear sort, Sort hierarchical, Top or bottom filter..., Clear filter, Set format, Conditional format..., and Create calculation... (highlighted with an orange box). The 'Create calculation...' option is the target for the next step in the tutorial.

The 'Create - 2021,2022' dialog box is shown. It has a title bar with a close button. Below the title bar is a text input field containing 'Test'. Under the heading 'Look across the column values', there are four radio button options: Average, Maximum, Minimum, and Median. Below this, there is an 'Aggregate' radio button. To the right of these options is a 'Preview' section showing a small grid with a blue header and a yellow body, with the text 'Calculates the percentage difference of the two members' below it. Below the 'Look across the column values' section, there are two sections: 'Arithmetic' and 'Percentage'. The 'Arithmetic' section has four radio button options: 2021 + 2022, 2021 - 2022, 2021 / 2022, and 2021 * 2022. The 'Percentage' section has two radio button options: 2022 % of change 2021 (selected) and 2022 % Of 2021. At the bottom right, there are 'OK' and 'Cancel' buttons.

Common Terms and Dimensions

Term	Definition
RPT Version	Historical territory version snaps (e.g., M1,M2,M3). Other versions include: Actuals, Budget, Consensus
Measure	Value of measure: shipment amt, order amt, extd wrty amt, QTY, etc.
Territory	Can be your territory of coverage (subregion, district, territory) down to your top 3 accounts
Product	Sets of product hierarchies that can be viewed and categorized by product class, all systems, total product hierarchy, etc. Expands to Product Category
Product Class	Product totals summarized by product class (lowest level)
Quarter	Options for multiple quarters, years, prior quarters, future quarter forecast, etc.

Sales Shared Views - EMEA

In the folder 'Sales Shared Views – EMEA', you can find already customized views.

These views can be cloned, further customized and saved in your personal folder.

