NUPlans Upgrade
Quick Reference
Change Summary

- New hardware upgrades with increased memory and storage
- Refreshed User Interface
- Faster Websheet Loading, recalculation and Scrolling
- No changes were made to existing functionality
NUPlans Web | Homepage
- Updated navigation panel and toolbar

**New**

**Old**
NUPlans Web | Cube Views

New

Old
NUPlans Web | Subset Editor

**New**

Subset editor: nu_planning_FY20 > G_ZeroDollar_Info > $0 Salary Budgets (Public)

**Old**

Subset Editor: nu_planning_FY20 > G_ZeroDollar_Info > $0 Salary Budgets (Public)
The following list describes the websheet toolbar buttons.

- **Actions Menu**
  Provides access to common websheet tasks such as closing and exporting.

- **Save data changes**
  Saves changes to the currently selected websheet.

- **Export**
  Exports the current websheet to a Microsoft Excel slice, an Excel snapshot, or an Adobe PDF file.

- **Reset data**
  Clears all the changed data values that you entered up to that point in a sandbox. Resets all the data values back to the current values in the base data.

- **Close**
  Closes the currently selected websheet.

- **Close others**
  Closes all websheets, except the currently selected websheet.

- **Close all**
  Closes all websheets.

- **Commit**
  Sends the websheet data modifications to the TM1 server.

- **Recalculate**
  If you edited any data values in the websheet, this option sends the data modifications to the TM1 server and then updates the data in the websheet.
  If you did not edit any data values in the websheet, this option retrieves the current values from the TM1 server and updates the data in the websheet.

- **Rebuild current sheet**
  Rebuilds the current websheet, including any Active Forms present in the websheet.

- **Rebuild current book**
  Rebuilds all websheets/tabs in the current book, including any Active Forms present.

- **Autofit selected column width**
  Adjusts the width of the currently selected column.

- **Sandbox**
  Creates or deletes a sandbox.
NUPlans Web | New Cube Viewer Toolbar Icons

The following list describes each button in the toolbar.

Actions menu
Provides access to common Cube Viewer tasks such as saving, closing, and exporting.

Save data changes
Saves changes to your current data.

Save view
Saves the current view to the TM1 server.

Save as
Saves the current cube view with a new name.

Export
Exports Cube Viewer data in the following formats:

Slice to Excel - Exports Cube Viewer data and TM1 formulas (SUBNM and DBRW functions) to a new Excel spreadsheet. The spreadsheet maintains a connection with the TM1 server.

Snapshot to Excel - Exports only Cube Viewer data to a new Excel spreadsheet, excluding the TM1 server formulas (SUBNM and DBRW functions). The spreadsheet does not maintain a connection with the TM1 server.

Export to PDF - Exports the Cube Viewer data to a PDF file. You must install a PostScript printer during the TM1 Web installation for the Export to PDF option to work. For more information, see the Planning Analytics Installation and Configuration documentation.

For more information on generating reports from a TM1 Web Cube Viewer, see "Generating a report from a Cube View" on page 41.

Reset data
Clears all the changed data values that you entered up to that point in a sandbox. Resets all the data values back to the current values in the base data.

Reset view
Reloads the visual appearance of the Cube Viewer to the last saved arrangement of title dimensions.
NUPlans Web | New Cube Viewer Toolbar Icons cont.

Close
Closes the currently selected cube view.

Close others
Closes all cube views, except the currently selected view.

Close all
Closes all cube views.

Commit
Sends the changes you make to data in the Cube Viewer to the TM1 server.

Recalculate
Updates the Cube Viewer configuration and recalculates data in the view. If you have edited any cells, all edits are automatically submitted to the TM1 server.

Auto calculation
With the Auto Calculation option turned off, TM1 Web does not automatically recalculate the Cube Viewer when the view configuration changes.

For example, if you edit a row subset or move a dimension from the titles to the columns, these changes are not immediately displayed in the Cube Viewer; you must click the Recalculate button to see your changes.

When the Auto Calculation option is turned on, TM1 Web automatically recalculates the Cube Viewer when the view configuration changes.

Suppress zeros
There are three options to suppress zeros:

- Suppresses zeros in rows and columns
- Suppresses zeros in rows
- Suppresses zeros in columns

View chart
Displays the Cube Viewer data in a chart format.

View chart and grid
Displays the Cube Viewer data in both grid and chart formats.

View grid
Displays the Cube Viewer data in a grid format.

Chart Properties
Displays options for selecting chart type or Scorecarding metric diagrams.
### NUPlans Web | Subset Editor Toolbar

The following table describes the Subset Editor toolbar buttons:

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save subset" /></td>
<td>Save subset</td>
<td>Saves only the elements that appear in the Subset list to the subset.</td>
</tr>
<tr>
<td><img src="image" alt="Save subset as" /></td>
<td>Save subset as</td>
<td>Saves only the elements that appear in the Subset list to the subset with a different name.</td>
</tr>
<tr>
<td><img src="image" alt="Reload subset" /></td>
<td>Reload subset</td>
<td>Reloads the original subset.</td>
</tr>
<tr>
<td><img src="image" alt="Subset all" /></td>
<td>Subset all</td>
<td>Displays all the elements in the parent dimension.</td>
</tr>
<tr>
<td><img src="image" alt="Cut, Copy and Paste" /></td>
<td>Cut, Copy and Paste</td>
<td>Cuts, copies, and pastes the selected elements of a subset.</td>
</tr>
<tr>
<td><img src="image" alt="Keep selected elements" /></td>
<td>Keep selected elements</td>
<td>Keeps elements that you select for the subset.</td>
</tr>
<tr>
<td><img src="image" alt="Delete selected elements" /></td>
<td>Delete selected elements</td>
<td>Removes elements that you select from the subset.</td>
</tr>
<tr>
<td><img src="image" alt="Filter subset" /></td>
<td>Filter subset</td>
<td>Allows you to select a group of elements in a subset that have related characteristics. You can filter elements in these ways:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Filter by level</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Filter by Attribute</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Filter by Expression</td>
</tr>
</tbody>
</table>
## NUPlans Web | Subset Editor Toolbar cont.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Sort subset</td>
<td>Lets you sort a subset in several ways:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sort Ascending</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sort Descending</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sort Hierarchically</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sort by Index Ascending</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sort by Index Descending</td>
</tr>
<tr>
<td>🌳</td>
<td>Tree expand</td>
<td>Expands the tree in several ways:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Drill Down Selected Consolidations - Expands the selected consolidation one level.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Expand Selected Consolidations - Expands the selected consolidation, showing all descendents.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Expand Tree Fully - Expands the entire hierarchy, showing all children of all parents.</td>
</tr>
<tr>
<td>🌳</td>
<td>Tree collapse</td>
<td>Collapses the tree in two ways:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Collapse Selected Consolidations - Collapses the expanded consolidation, hiding all descendents.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Collapse Tree Fully - Collapses the entire hierarchy.</td>
</tr>
<tr>
<td>🛡</td>
<td>Insert parents of selected elements</td>
<td>Inserts the parent of the selected element immediately above that element in the hierarchy tree.</td>
</tr>
<tr>
<td>🏛</td>
<td>Expand above</td>
<td>Displays consolidations at the bottom of the list of children, in both the Available Elements and Subset lists. The children of the consolidation expand above the consolidation.</td>
</tr>
<tr>
<td>🍒</td>
<td>Create custom consolidation</td>
<td>Allows you to build consolidated elements on the fly when working with a view. For more information, see &quot;Creating custom consolidations&quot; on page 53.</td>
</tr>
<tr>
<td>🔍</td>
<td>Find in subset</td>
<td>Enables you to search for elements in the current subset based on the search text you enter.</td>
</tr>
</tbody>
</table>