

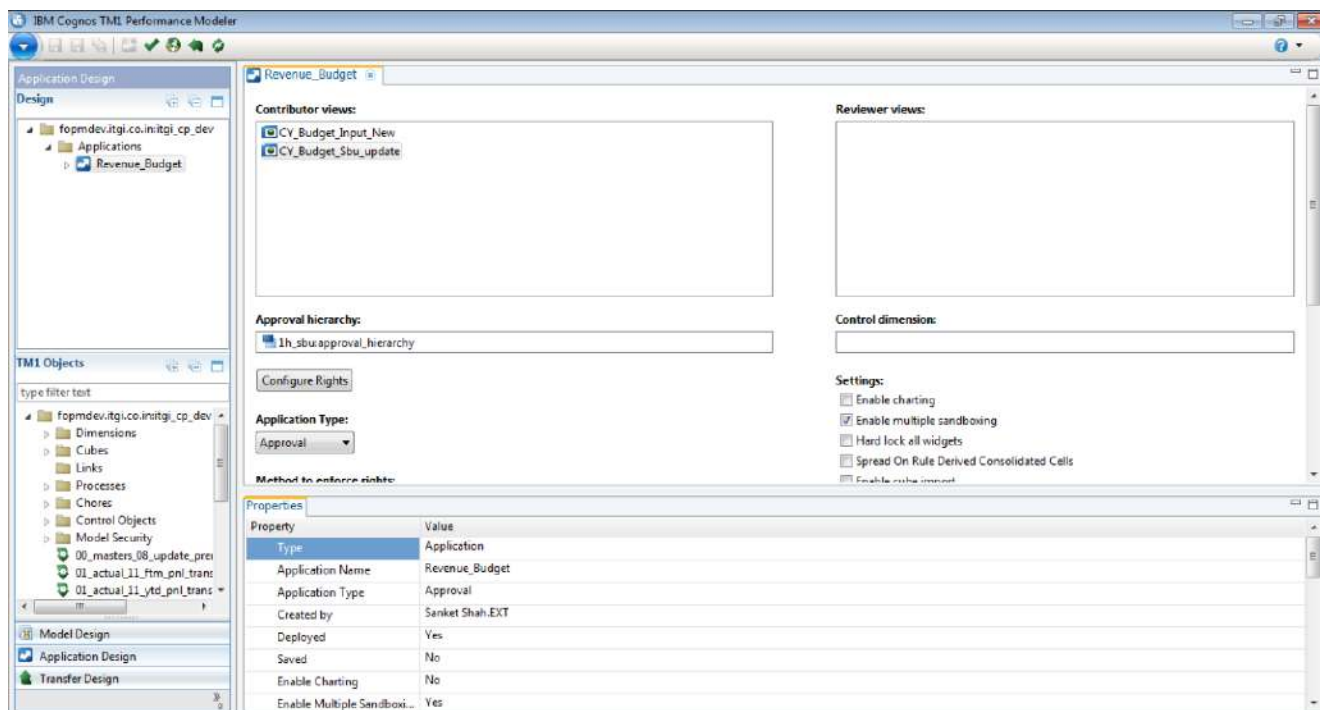
Using Active Form in Tm1 Contributor Application

What is TM1 Contributor?

TM1 Contributor is a web based interface which includes a built in workflow where user can access their related node and submit data to the plan. This interface provides a functionality to power user to review who took the ownership, who submitted and who rejected the data.

How application is created?

In TM1 Performance Modeler, Application design tab is used to create, validate and deploy the contributor application. The developer can set the contributor view, reviewer view, application type, configure rights and other functionalities.

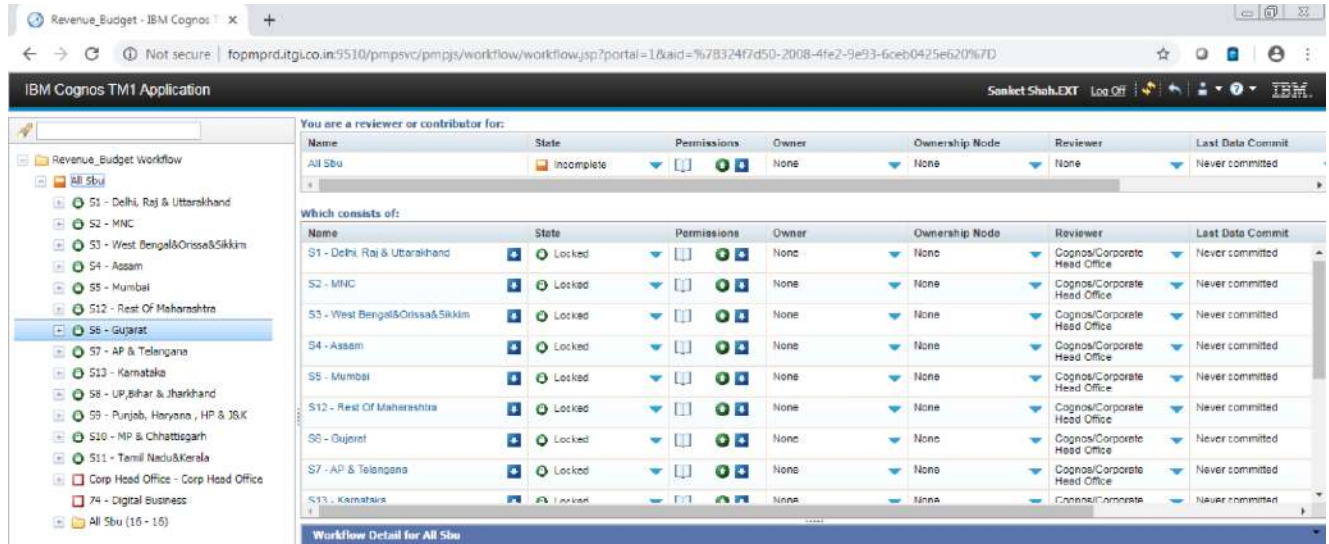


How application works?

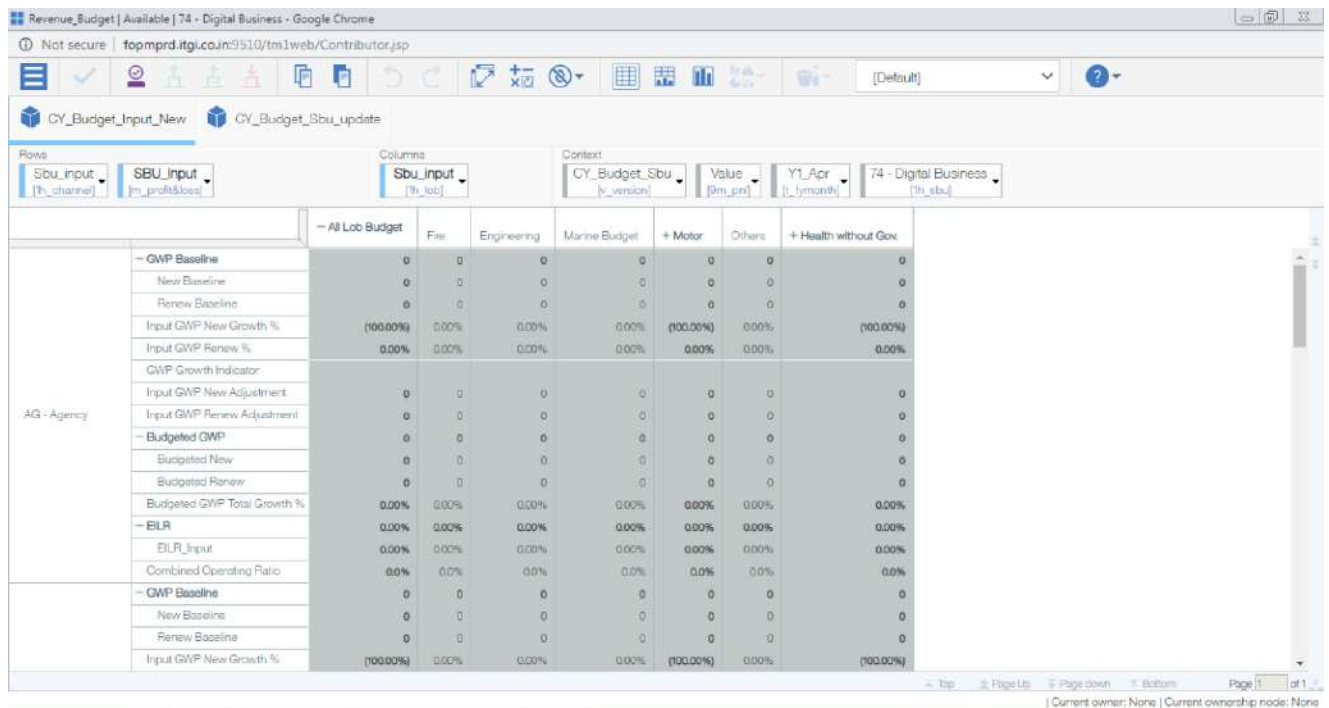
Business Users login with their credentials on the link provided to input data.



Then select the provided workflow and the accessible node to open contributor input view.

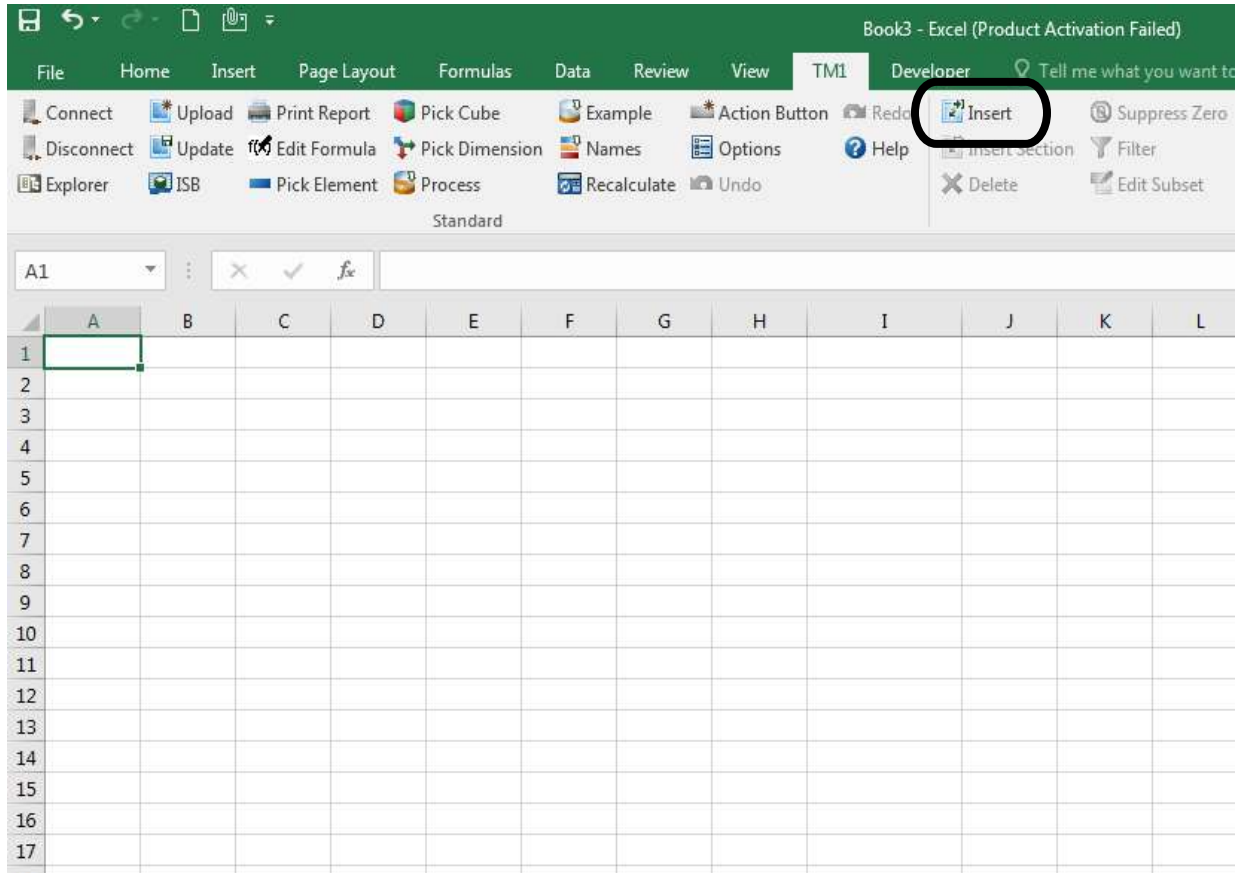


Contributor view will be a built in design of the cube view, like below –

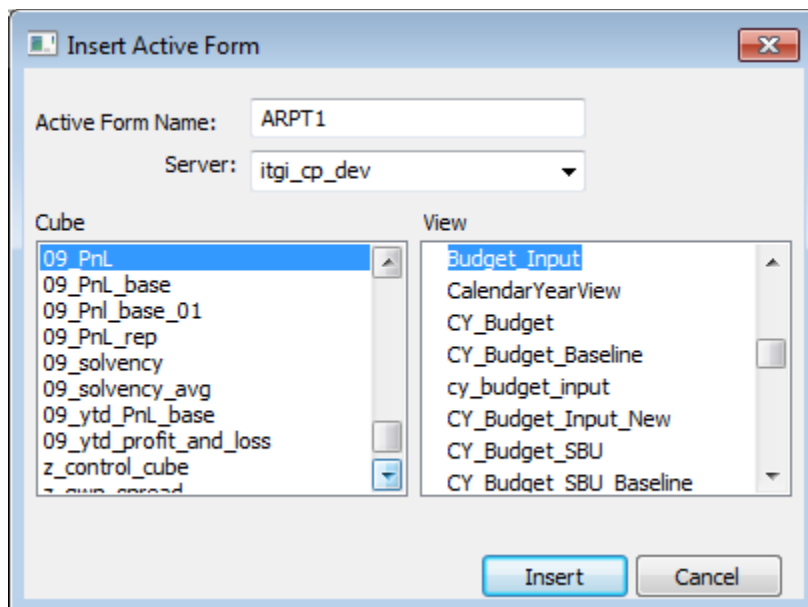


User then will take the ownership of the node, input data and then submit to the plan.

2. Start TM1 Perspective, connect to the Instance and Select Insert in Active Form Section-



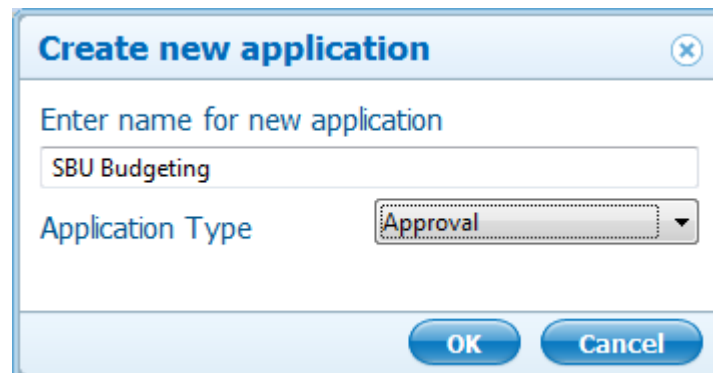
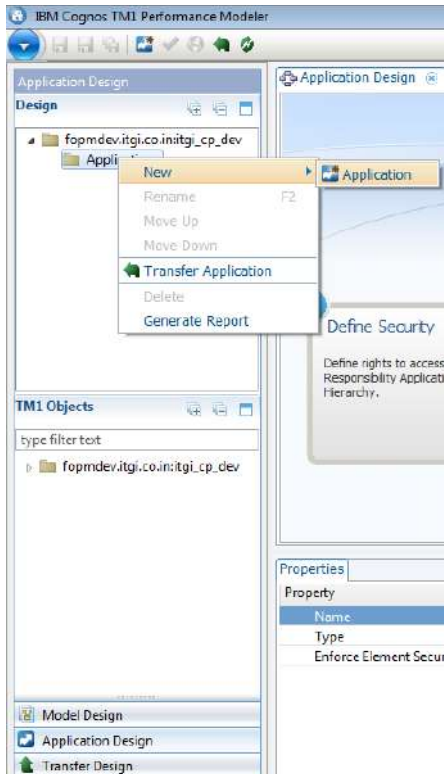
3. Select the View from the Select Active Form Dialog Box and Click on Insert –



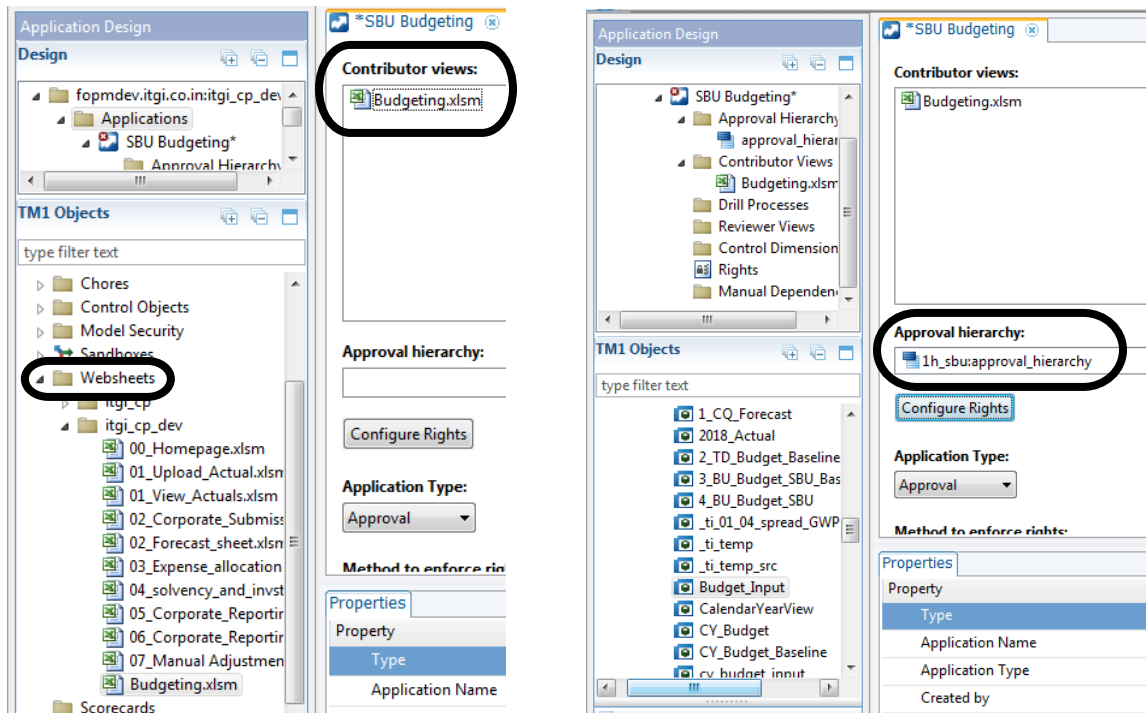
4. Active Form will be displayed with the basic formatting as below -

FOR CREATING ACTIVE FORM IN PAX – Create an Exploration view of the cube in Excel and then select Convert to → Dynamic Reports → This Sheet to create the Active Form. Formatting can be done same ways as it is mentioned for creating Active Form using Perspectives.

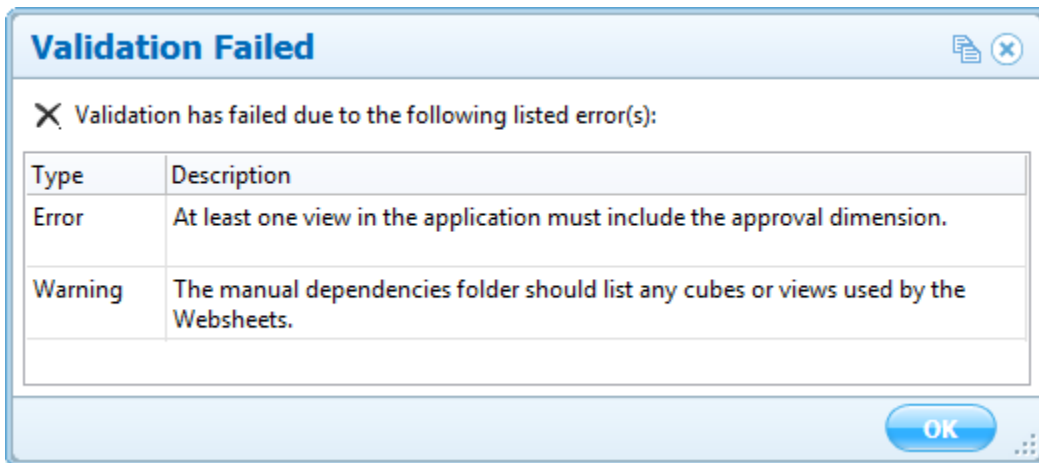
8. Upload the Active Form as a Web sheet in TM1 Application folder. Set the Security to Public.
9. For Application creation, Start Performance Modeler and Select Application Design Tab, Right click on Application, Select Application under New and name it as per requirement along with selecting the application type.



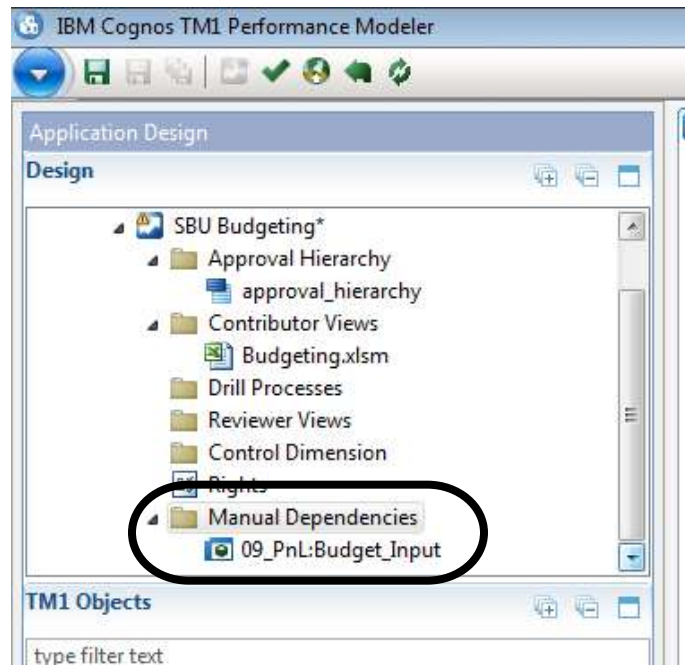
10. Now from TM1 Object on Left pan, drag and drop the Active Form to the Contributor View on the Right pan. Active Form will be visible under the Websheets folder in the left pan. And drag the required approval hierarchy created to the right side under Approval Hierarchy tab.



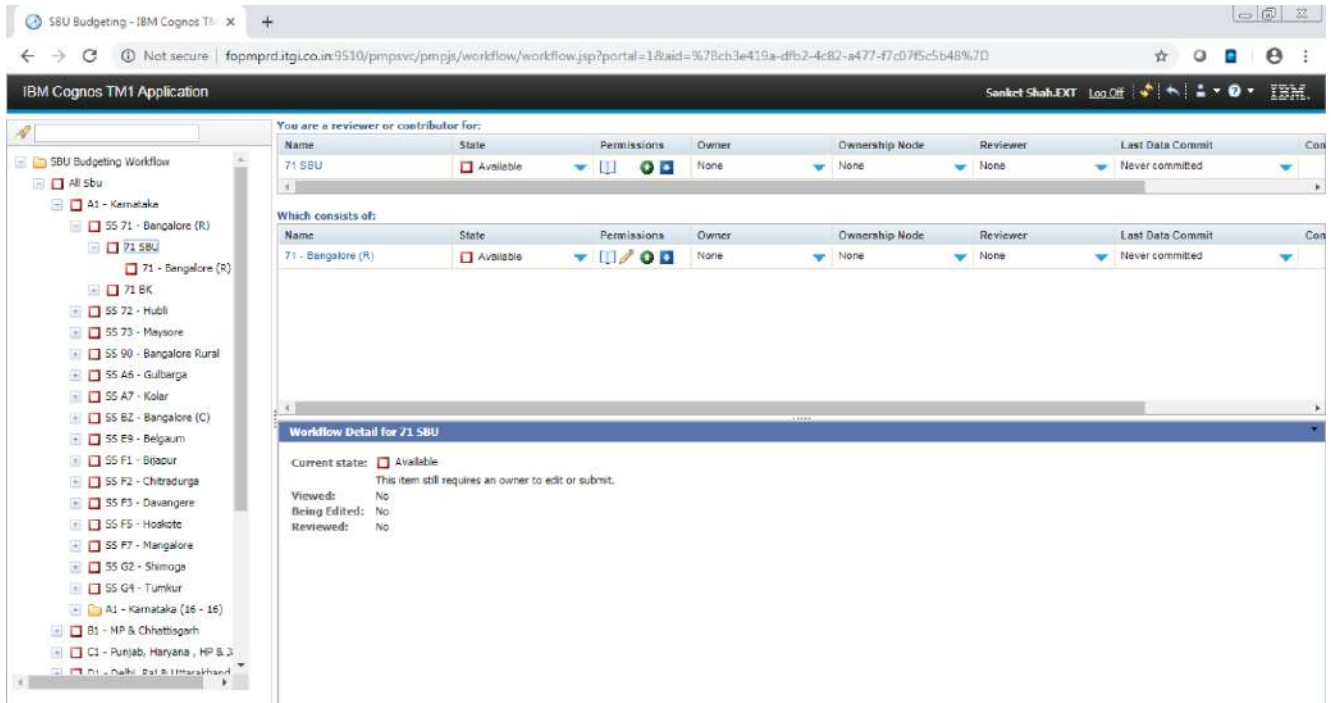
11. Now validate the application and the following errors will be shown -



12. To resolve the error, copy the cube view (view used to create the Active Form) to the Manual Dependencies Folder in Design pan and then validate the application. Once validation is successful deploy the application. –



13. Activate the Application in Contributor and Click on Application name to open the workflow.



14. Select the Node in the right pane and this will open the contributor view-

SBU CORP - Corporate Head Office

| | Agency | Broker | Bancassurance | Digital | Direct | Government | Motor Dealer | Affinity | All Channel |
|----------------------|--------|--------|---------------|---------|--------|------------|--------------|----------|-------------|
| All LOB Budget | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Fire | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| + Marine | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| + Motor | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Engineering | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| + Health | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Aviation | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Credit | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Liability | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| + PA | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Travel | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Workmen Compensation | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Crop | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Others | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Y1_Apr Y1_May

Current owner: None | Current ownership node: None

End User now can take the Ownership and input data to the Plan.

Happy Learning!!!