



User Guide

Product Information

This document applies to IBM Cognos 8 Planning Version 8.4.1 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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Table of Contents

Introduction	5
Chapter 1: Getting Started with Contributor Web Client	7
Workflow	7
The Tree	7
The Table	8
Open Contributor	9
Submit Data	9
Review Data	10
Chapter 2: Working with Data	11
Parts of the Workspace	11
Tabs	11
Dimensions	11
Copying and Pasting Data	13
Quick Copy Commands	13
Quick Data Entry Commands	14
Calculated Cells, Breakbacks, and Holds	16
Apply a Data Hold	17
Adding Commentary	17
Enter Commentary	18
View Commentary	19
Update Data	20
Validate Data	20
Print Data	21
Chapter 3: Importing Data	23
Import from a Text File	23
Quick Load from Excel	23
Get Data	23
Creating a Local Link	24
Use Local Links with Contributor for <i>Excel</i> and Classic Contributor	28
Run a Local Link	28
System Links	29
Chapter 4: Managing Changes to the Grid	31
Working with Tabs	31
Try It Yourself - Tear Off a Tab	31
Try It Yourself - Maximize a Tab	32
Freezing a Pane	33
Hiding Rows and Columns	33
Sort Dimensions	33
Stacking Dimensions	34
Try It Yourself - Stack a Dimension	34
Replacing Dimensions	35

Try It Yourself - Replace Dimensions	35
Chapter 5: Exporting Data	37
Quick Export to Excel	37
Export to a Text File	37
Export to Excel Wizard	37
Saved Selections	37
Reports	38
Chapter 6: Work Offline	39
Take Work Offline	39
Open the Offline Browser	39
Take Work Back Online	40
Chapter 7: Troubleshooting	41
Get Data Troubleshooting	41
Cannot Access an Item in the Target Dimension	41
Cannot Access a Dimension Item In the Target Cube	41
Extra Source Dimension in a Contributor-To-Contributor Load	41
Item Removed from the Target Dimension	41
An Extra Target Dimension Exists	42
Missing Source Dimension in a Contributor-To-Contributor Load	42
Additional Source Dimension Exists in a Contributor-To-Contributor Load	42
Target Cube is Read-Only	42
Export for <i>Excel</i> Troubleshooting	42
Glossary	43
Index	45

Introduction

Use this document with the IBM® Cognos® 8 Planning - Contributor Web Client. This guide describes how you can use Contributor to see the current state of your plan, and explains how to add and review data.

IBM Cognos 8 Planning provides the ability to plan, budget, and forecast in a collaborative, secure manner. The major components are Analyst and Contributor.

IBM Cognos 8 Planning - Analyst

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 8 Planning - Contributor.

IBM Cognos 8 Planning - Contributor

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 Resource Center (http://www.ibm.com/software/data/support/cognos_crc.html).

Best Practices for IBM Cognos 8 Planning

The 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 <http://www.cognos.com/innovationcenter>.

Audience

To use this guide, you should have an understanding of IBM Cognos 8 Planning - Contributor and IBM Cognos 8 Planning - Analyst.

Finding Information

Product documentation is available in online help from the **Help** menu or button in IBM Cognos products.

To find the most current product documentation, including all localized documentation and knowledge base materials, access the IBM Cognos Resource Center (http://www.ibm.com/software/data/support/cognos_crc.html).

You can also read PDF versions of the product readme files and installation guides directly from IBM Cognos product CDs.

Samples Disclaimer

The Great Outdoors Company, GO Sales, any variation of the Great Outdoors name, and Planning Sample, depict fictitious business operations with sample data used to develop sample applications for IBM and IBM customers. These fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values, is coincidental. Unauthorized duplication is prohibited.

Chapter 1: Getting Started with Contributor Web Client

Contributor Web Client streamlines data collection and workflow management. It eliminates problems with errors, version control, and timeliness that characterize decentralized planning processes. Organizations can easily engage thousands of people in the planning process, collecting data from managers and staff across divisions and across geographies as well as from sales, suppliers, and customers worldwide. Many users can work simultaneously because Contributor is optimized for end-user performance.

You can contribute to plans contained in packages. A package defines a subset of data that is relevant to an intended group of users. For example, one planning package may be intended for sales managers to forecast sales in upcoming quarters.

Contributor Sample

IBM Cognos 8 Planning includes sample applications that you can use for testing and training. Throughout this document you will see the Sales plan from the `go_expenses_contributor` sample used to demonstrate Contributor functions. An administrator must set up the `go_expenses_contributor` sample for you to use. For more information, see the IBM Cognos 8 Planning *Installation and Configuration Guide*.

Workflow


The Workflow screen appears when you log on to Contributor. It consists of a tree, a table, and approval hierarchy.








The tree on the left side of the screen shows, in a hierarchical form, the areas that you are responsible for contributing to (**Contributions**) and reviewing (**Reviews**). Depending on your rights, you may see Contributions, Reviews, or both. When you click an item in the tree, a table with the details for the item appears on the right side of the screen.

An item in the tree or table is known as an e.List item. Typical examples are Sales Division, Marketing Division, Development Division, and Cost Center. The e.List item names depend on the design of your application.

The Tree

Each item in the tree has an icon that indicates the current state of the data.


Icon	State and description
	Not started No changes have been saved to the data, although the contribution may have been opened for editing.


Icon	State and description
	<p>Work in progress</p> <p>The data was saved but not submitted. You can change and submit data in this state.</p>
	<p>Locked</p> <p>The data was submitted and the e.List item was locked. Data in this state is read only. If an e.List item is rejected, its state returns to Work in progress.</p>
	<p>Incomplete</p> <p>At least one item belonging to this item is Not started, and at least one other item is in a state of Work in progress, Locked, or Ready. Data in this state was aggregated. The Incomplete state applies only to review e.List items.</p>
	<p>Ready</p> <p>All e.List items belonging to the reviewer e.List item are locked. The data is ready to be submitted to the next level in the hierarchy.</p>
	<p>Currently being edited or annotated</p> <p>The e.List item was opened for editing or annotating. Users end an edit session by closing the grid or by submitting the e.List item.</p>
	<p>Out of date</p> <p>Data in the e.List item needs restructuring to reflect changes in the application, or system data must be imported.</p>
	<p>Currently being edited or annotated and is out of date</p>

The Table

The table on the right side of the screen gives information such as the workflow state of the item, the current owner, the reviewer, and when the item last changed.

If a document is attached to an e.List item, an icon  appears next to that item.

If Contributor for *Excel* is installed and configured, you can click the *Excel* button  to open the e.List item using Contributor for *Excel*.

If you are a reviewer of an e.List item, you can reject a submitted item from this screen by clicking the reject button .

Open Contributor

To start reviewing or adding data, you must have an intranet or secure Internet connection.

Steps

1. Open a Web browser. Type the Web address supplied by your administrator in the address bar, typically `http://servername/cognos8`.
2. Type your user ID and password and click **OK**.
3. In IBM Cognos Connection, in the upper-right corner, click **Launch, Contributor**. If you have access to more than one package, click the package that you require.

On the workflow page, you see a graphical overview of all the areas you are responsible for, and the status of the data.

4. To start using Contributor, in the tree on the left side of the screen, click an item. The table that appears shows the e.List items for which you are a contributor or reviewer.
To see the details panel for more information about an item, click the blue down arrow.
5. To send email, click the name of the person in the **Ownership** or **Reviewer** cells or in the details panel.
6. To start working, click the e.List item in the table. This opens an e.List item in a grid where you can view and enter data.


Submit Data

You submit an e.List item to the next reviewer in the planning model hierarchy when you are happy with the data it contains. After you submit the e.List item, the item is locked and you can make no further changes to the data. The reviewer can either accept or reject the changes you made to the e.List item.

If you added a value into a cell that has a validation rule defined, and that value is outside the bounds of the specified validation rule, an explanatory or warning message is shown when you attempt to submit the plan. You must correct the data before you can submit an e.List item to the next reviewer.

To submit data, you must have submit rights.

Steps


1. From the **Workflow Actions** menu, click **Submit**, or click the Submit icon .



If errors are identified during the validation process, they are summarized in the **Validation Error** dialog box. You must fix validation errors before submitting data for review.


2. From the **File** menu, click **Close**.



Review Data

You are responsible for reviewing the e.List items that are grouped under **Reviews** on the workflow page.


You can view e.List items that you have the rights for in any state. You can view more than one e.List item at a time. The e.List items will open in separate windows. When an item has been submitted for review, it is **Locked** .



If you are not happy with the contents of an e.List item, and you have appropriate rights, you can reject it, either from the workflow screen, or from the grid by clicking the **Reject** button . The state of a rejected e.List item changes from Locked to **Work in progress** .

You may be prompted to send an email to the owners of the contribution explaining the changes that they must make before it can be accepted. You can also annotate the contribution, and if you have appropriate rights, you can edit the contribution. You must **Take Ownership**  first.

When all contribution e.List items in a review e.List item have been submitted, it has a ready state . If you are happy with all the contents, submit the review e.List item .

Chapter 2: Working with Data

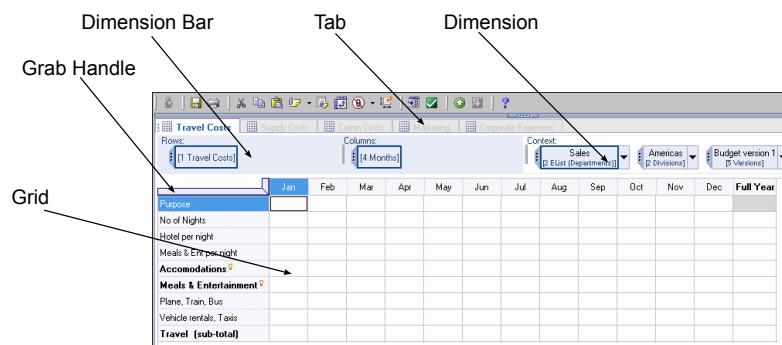
Adding or editing data in the web client allows you to submit information to your datastore. You must have the proper access rights granted to you by your system administrator to modify data. Data that you can edit has a white background. Read-only data has a gray background. If you are not the current owner, the data opens in a read-only view. To start adding or editing data, click **Take Ownership** .

You can edit data only if it has a workflow state of **Not started**  or **Work in progress** . The icons indicate the workflow state. For more information, see "[Workflow](#)" (p. 7).

Parts of the Workspace

The workspace is comprised of the following parts:

- **Tabs** - a separate tab represents each cube in the application
- **Dimension Bar** - shows the dimensions that are in the rows, columns, and context
- **Dimensions** - groups of related data, such as products or dates
- **Grid** - the area where you add or edit data
- **Grab Handles** - points where you can grab a dimension or tab to move it within the grid



Tabs

A tab is a collection of dimensions and that represents a cube. Each tab typically contains a specific dimension which is not common to other tabs. Usually, this dimension defines the function of the tab. For example, using the `go_expenses_contributor` sample, the Travel Costs dimension is specific to the Travel Costs tab. However, tabs also share common dimensions, such as months, budget versions, and divisions that are often used to filter the grid.

Dimensions

Dimensions define the grid of the tab, forming the rows, columns, and context. A dimension is a list of related items that often include calculations. Dimensions can include lists of departments, products, customers, months, and Profit & Loss or balance sheet line items.

All dimensions within a tab determine the information shown in the grid. While dimensions in rows or columns display all of the items in their lists, context dimensions filter the grid to display only information for the active item.

Row and Column Dimensions

The row and column dimensions are shown on the Dimension Bar. Placing a dimension into a row or column displays each of its list items as a heading, and a cell is created for every intersecting row and column. To have any cells in the grid you must have at least one row and one column dimension.

Basic Layout

The basic layout has one row and one column dimension on the dimension bar.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
Purpose													
No of Nights													
Hotel per night													
Meals & Ent per night													
Accomodations													
Meals & Entertainment													
Plane, Train, Bus													
Vehicle rentals, Taxis													
Travel (sub-total)													

Nested Layout

Nesting dimensions on the rows or columns increases the amount of data visible on the grid and allows you to view information that is more specific. For example, the following grid has two dimensions nested on the rows.

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
Supplies (sub-total)	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 2	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: computer supplies	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 2	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: office supplies	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0

Note: The items of the child dimension are repeated within each item of the parent dimension of a nested row or column. Each dimension added to a row or column multiplies the number of rows or columns by the number of items in the nested dimension.

Context Dimensions

Context dimensions do not appear on the rows or columns but filter the context of the grid. While row and column dimensions display all of their list items in the grid, context dimensions limit the items in the grid by displaying only information related to the active item in the dimension. Multiple context dimensions may exist and each context dimension filters the information in the grid cumulatively. You can change the context of the grid by changing the context dimensions on the Dimension Bar.

Using rows and columns alone to find specific data may decrease readability. Using context dimensions alone to view general data may also limit readability. By nesting dimensions and filtering context you can make data entry and grid navigation easier.

Copying and Pasting Data

You can copy and paste data from one cell into a single cell or into multiple cells. You cannot paste data from text, date, or D-List formatted item cells into numeric cells. Also, you cannot paste data from text cells into date cells. For example, if you copy data from a text cell and try to paste it into a numeric cell, no data appears in the numeric cell.

You can create a URL to a cell or tab by clicking **Copy URL** from the **Edit** menu. You can then paste the URL into an email or other location for users to access.

Tip: You can autosize the rows and columns in the visible range by clicking **Autosize Visible Range** from the **View** menu.

Quick Copy Commands

Copy commands copy a value or operation to the left, right, above, or below rows and columns on a single tab. Copy commands perform an action on cells of the same type as the one they were entered in and only apply to the current grid. These commands apply to breakback cells, but do not apply to nested, hidden, or collapsed dimensions.

You can combine copy and data entry commands, although you should not use them with the Grow command.

The following table lists the quick copy commands.

Command	Description	Action
>	Copies right	Example: 5> Copies the number 5 to the right Example: inc6> Increases the row by 6% for each value to the right
<	Copies left	Example: add15< Adds 15 to each value in the row to the left

Command	Description	Action
	Copies down	Example: 3 Copies 3 down the column Example: reset Resets the cells down the column to the last saved value
^	Copies up	Example: hold^ Holds the cell values up the column Example: 2>^ Copies 2 to the right and up the column
:	Copy stopper	Used in conjunction with a copy command to stop copying beyond the cell

Quick Data Entry Commands

Typing a data entry command in a cell performs an action on the cell value. Data entry commands are processed when you press Enter and only apply to the current grid.

These commands are not case sensitive.

You can use commands across two dimensions, but not across pages.

The following table lists the quick data entry commands.

Command	Description	Action
K	Enters the value in thousands.	Example: 5K Enters 5,000
M	Enters the value in millions.	Example: 10M Enters 10,000,000
Add, +	Adds a number to the cell value.	
Subtract, Sub	Subtracts a number from the cell value. Important: A minus sign (-) is not permitted for subtract because this indicates a negative number.	Example: sub8 Subtracts 8 from the cell value

Command	Description	Action
Multiply, Mul, *	Multiplies the cell value by a number.	Example: mul3 Multiplies the cell value by 3
Percent, per, %	Multiplies the cell value by a number added as a percentage.	Example: per5 Gives 5% of the original cell value
Increase, Inc	Increases the cell value by a number added as a percentage.	
Decrease, Dec	Decreases the cell value by a number added as a percentage.	Example: decrease6 Decreases the cell value by 6%
Power, Pow	Takes the cell value to the number added as an exponent.	Example: Pow10 Raises the value to the power of 10
Grow Compound, Grow Linear, Gro-Com, GroLin, GC, GL	Grows cells by a percentage. Only valid in time dimensions, where each period increases either linearly, or as a compound value. Important: Insert the numeric value between the Grow and Linear/Compound command, such as Gro10Com, G40L.	Example: G10L Increases the value by 10 percent of the original value each period.
Divide, Div, /	Divides the cell value by the number added.	Example: Div1.1 Divides cell value by 1.1
Reset, Res	Resets selected cell values to the last saved version.	
Zero, Zer	Makes the cell value a zero.	
Round, Rou	Rounds cells to the appropriate level based on input.	Example: Round100 Rounds all cells to the nearest 100, where 5,475 becomes 5,500
Hold, Hol	Holds the cell value from breakback calculations.	
Release, Rel	Releases held cells.	

Calculated Cells, Breakbacks, and Holds

If you type data into a calculated cell and press Enter, data in other cells that are part of the calculation are automatically recalculated. If a cell contains calculations, the numbers appear bold.

Typically, totals are split according to the original values contained in the cells that make up the calculation. For example, if you type an amount into the Total cell for Jan through Dec and press Enter, the amount is automatically divided over the 12 months. This is called breakback.

Calculated cells may have associated business logic or validation rules. If you enter a value in a calculated cell that is outside the bounds of the rule, a warning message is shown when you attempt to submit or save the plan. You must correct the data before you can submit an e.List item to the next reviewer or save the plan to the server. For more information, see ["Validate Data" \(p. 20\)](#).

Note: If you use breakback on calculated cells, the results will be propagated to all cells involved in the calculation including cells in the current grid and across the model.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	24000

In the above example, if you change the total to 30,000 and press Enter, each month total changes to 2,500, as shown below.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2500	2500	2500	2500	2500	2500	2500	2500	2500	2500	2500	2500	30000

If you change June to 3,000 and press Enter, and then change the total annual cell to 40,000 and press Enter, the June total changes to 3,934 and the other months change to 3,279. The month totals changed proportionally according to the values contained in the cells.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
3279	3279	3279	3279	3279	3934	3279	3279	3279	3279	3279	3279	40000

However, if you change the June total to 3,000 without pressing Enter and then change the total annual cell to 40,000 and press Enter, the June total is held at 3,000, and the other months change to 3,364.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
3364	3364	3364	3364	3364	3000	3364	3364	3364	3364	3364	3364	40000

Apply a Data Hold

You can apply a data hold to a cell or range of cells in the grid. When a hold is applied the data will not change as a result of a breakback or calculations. Cells that are held appear light blue.

Data holds are helpful for investigating different budget scenarios before finalizing the forecast. Holds control how the data is calculated in a breakback by forcing certain values to remain constant so you can see what you can change within the plan, and determine the impact of the forecast.

To reset unsaved changes to data and revert to the last saved version, select **Reset Data** from the **File** menu.

Steps

1. Right-click the cell you want to hold and click **Hold**. The cell appears light blue.

To hold a selection of cells, select multiple continuous or separate cells, right-click any of the selected cells, and click **Hold**.

2. To remove a hold on a single cell or group of cells, right-click the held cell and click **Release**. To remove all holds, right-click any held cell and click **Release All**.

Cells are also released if you change context selection or if you change to a different tab.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
Purpose													
No of Nights	10	10	10	10	10	10	10	10	10	10	10	10	122
Hotel per night	10	10	10	10	10	10	10	10	10	10	10	10	10
Meals & Ent per night	10	10	10	10	10	10	10	10	10	10	10	10	10
Accomodations	104	104	104	104	104	104	104	104	104	104	104	104	1,250
Meals & Entertainment	104	104	104	104	104	104	104	104	104	104	104	104	1,250
Plane, Train, Bus	104	104	104	104	104	104	104	104	104	104	104	104	1,250
Vehicle rentals, Taxis	104	104	104	104	104	104	104	104	104	104	104	104	1,250
Travel (sub-total)	417	417	417	417	417	417	417	417	417	417	417	417	5,000

Adding Commentary

User annotations and attached documents that are linked to a plan are grouped together to form commentary. You can copy commentary between cubes and applications using administration, system, and local links. You can only copy commentary using links that contain data.

You can attach many types of files to a cell, tab, or model to help support your planning process. The administrator in the Contributor Administration Console configures the file types and sizes that you can attach. The attachments are stored in a Planning Application database.

The following default file types are allowed:

- Microsoft Word (.doc, .docx)

- Microsoft Excel (.xls, .xlsx, .xlsm, .xlsb)
- Microsoft PowerPoint (.ppt, .pptx)
- ZIP Files (.zip)
- RAR Files (.rar)
- Microsoft Project (.mpp)
- Web Documents (.htm, .html)
- Text Files (.txt)
- PDF Files (.pdf)
- Microsoft Visio (.vsd)

The administrator can add or remove any file types from the defaults provided. Executable files (.exe) are not included in the default list for security reasons, but can be added by the administrator.

Enter Commentary

You may want to add notes to your plan. You can do this by commenting on a cell, a tab, or the whole model while you enter data or after you submit.

You can add commentary if you have permissions to edit or review the e.List item. If you only have view rights to an e.List item, you cannot add commentary.

Important: After you save or submit a session, you cannot edit commentary. But the person who created the comment can delete it.

Steps

1. Right-click the cell or tab that you want to annotate.
2. Click **Add Commentary** and type your note.
3. If you want to attach a document, click the **Source file** browse button.
4. If you want to add a link, do one of the following:
 - To add a link to a web page, in the **Commentary - Add** dialog box, type a valid URL.
 - To add a link to an email address, type the HTML link command as follows:

mailto:email address

Clicking this link opens a new mail message window in your default email application, and puts the email address in the To: field.

- To add a link to a file, type the HTML link command as follows:

```
file:\\unc_drive_name\docs\expenses.xls
```

Before you link to a file, ensure that the file is in a shared network location. Also, use the universal naming convention instead of a fixed drive letter.

- To view cell or tab commentary, move your pointer over the red triangle in the top right corner of the cell or, for tabs, over the commentary icon on the tab.
- If you want to add a comment to the model, click **Edit, Add Commentary, Model**, type your note and optionally attach a document.

View Commentary

You can view all types of model, tab, and cell comments and attached documents in the Commentary Browser.

Your administrator may have configured your application so that actions you take, such as typing data, importing files, and copying and pasting data, are recorded as audit annotations. If enabled, you can view audit annotations for any cells for which you have at least view access.

For example, a conference justification document was added to the number of nights for September. The reviewer can now see why more nights were requested for this budget.

The screenshot displays the application interface with a data table and a Commentary Browser window. The data table shows the number of nights for various months, with a red triangle in the top right corner of the cell for September (125). The Commentary Browser window shows a table of commentary entries, with the entry for 'Travel Costs' selected. The entry details include the user 'Dale Thomas', the date 'September 22, 2008 3:57:11 PM EDT', and the document 'conference justification.doc (11 kb)'. The Commentary Filter and Commentary View sections are also visible.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year	
Purpose	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc		
No of Nights		79	82	95	64	62	71	104	108	125	110	90	87	1,077

Model or Tab	Type	Old Value	Value	User	Date	Last linked by name	Last linked by datetime	E.List It
Travel Costs	Attached Document	125	125	Dale Thomas	September 22, 2008 3:57:11 PM EDT			Sales

User: Dale Thomas
September 22, 2008 3:57:11 PM EDT

Location: No of Nights, Sales, Americas, Sep, Budget version 1

Document: conference justification.doc (11 kb)

Commentary Filter:
 User Annotation
 Audit
 Attached Document

Commentary View:
 Current page
 All pages

Buttons: View Document, Edit Document, Delete, Print, Close

Steps

- To view comments and attached documents, click **View, Browse Commentary and Documents**.
- If you want to filter the commentary, select **User Annotation, Audit, or Attached Document**.
- If you want to filter the commentary view, select **Current page** or **All pages**.

Tip: You can link to the cell with the commentary by selecting an entry in the commentary browser and clicking the cell location.

Update Data

You may need to update data if you receive a message that the data on the server is more recent than the displayed data.

You may be unable to save your changes until you have updated the data.

Step

- Click **Workflow Actions**, and then click **Update**.


Validate Data

Data validation ensures that data entered in a Contributor application is in the right format and conforms to existing business rules. These rules, which the administrator defines in the Contributor Administration Console, represent a single data entry requirement imposed on a range of cells in a single cube of a model.

Validation rules range from the basic checks, such as data type (integer or string) and format (dates), to rules that use sophisticated business logic to verify if submitted data is valid. Validation rules are also associated with actions that ensure conformance to the required input, output, and target requirements, and that only valid data is accepted. Actions associated with a specific rule can present a warning message, prevent you from saving the plan, or prevent you from submitting it to the next e.List reviewer.

Because business requirements may change, we recommend that you validate your data regularly. The benefit of validating data on the client is that it allows you to validate input data before transmitting it to the server.

Steps

1. Click the tab that contains the target cell range for validation.
2. To verify that the data entries or changes conform to existing business rules and data-format restrictions, from the **File** menu, click **Validate Data** or, on the toolbar, click the Validate Data button .
3. If errors are detected, in the **Validation Error** dialog box, click the error to view its location in the grid. The pointer appears in the first offending cell of the first failed rule in the rule set. For example, the following error occurred because the hotel cost exceeded the allowable limit of \$250 per night.

The screenshot shows a software interface for 'go_expenses_contributor'. The main window displays a data grid for 'Travel Costs'. The grid has columns for months (Jan to Dec) and a 'Full Year' column. The rows include 'Purpose', 'No of Nights', and 'Hotel per night'. A validation error message is displayed at the bottom of the grid, indicating that the 'Hotel per night' value for March (275) exceeds the \$250 limit.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
Purpose	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	
No of Nights	79	82	95	64	62	71	104	108	125	110	90	87	1,077
Hotel per night	195	210	275	190	245	185	230	175	215	245	260	200	220

Validation Errors

Error message	Value	Location	Operations blocked
The cost per night cannot exceed \$250.	275	Travel Costs - (Hotel per night, Sales, Americas, Mar, Budget version 1)	message only

- Continue to validate until you do not receive any more errors.

If no error is detected, you will get a validation success message.

Print Data

You can print the current view of by specifying certain e.List items. You can also choose to include commentary.

If you want to print just the active grid, click the print button on the toolbar.

Steps

- From the **File** menu, click **Print**.
- The first screen of the wizard displays the pages that you have selected to print. Click the items you want to include. Use **Ctrl+click** to select more than one item.
- If you want to include commentary, select the **include commentaries** check box.
Note: If you do not have context dimensions, you will be prompted to include commentaries.
- Click **Next** to view a list of pages you have selected to print. You can select or remove pages included in the printout.
- Click **Finish**.
- Select the printer you want to use and click **Print**.
- If you want to preview before printing, click **Yes**.
- If you want to change margins, scaling, and alignment, click **Page Setup**.
- Click **Print**

Chapter 3: Importing Data

You can import data using local and system links in the Contributor grid using the Get Data wizard. You can also use quick import for text files.

Local links are created directly in **Get Data** wizard. They load data into Contributor from various sources, including other Contributor tabs.

The Contributor administrator creates System links and deploys them to designated users, groups, or roles. System links are defined in the **Contributor Administration Console** and web users cannot edit or share them. System links can use source data from other Contributor applications in the same Planning environment.

Import from a Text File

You can load data from a tab delimited text file into Contributor, however you cannot import aggregated or calculated values.

Steps

- Select **File, Import, From Text File**.

The data in the grid is written over with the imported data.

Tip: You can also right-click in the grid and select **Import from Text File** from the context menu.

Quick Load from Excel

If you exported data to Excel using **Quick Export**, see "[Quick Export to Excel](#)" (p. 37), you can use quick load to import the data back into the grid. You cannot import aggregated or calculated values into the grid using quick load.

Steps

1. From the **File** menu, click **Get Data**.
2. On the **Local Links** tab, click **Quick Load** and select the Excel file and worksheet you would like to import.

Get Data


You can import data into a model from a tab within the same model or from an external file. For example, you may want to copy one forecast scenario from one tab to another tab as a starting point for a new analysis.


The import definitions are saved as a local link in the Get Data wizard. You can copy or delete existing links. You can also view the run history of links.

Link States

The **Get Data** dialog box, from the **File** menu, lists all available links (Local or System) and the status of those links.

Links can exist in two states: Ready or Incomplete.

A Ready status icon  appears when the link definition is correctly and completely defined. You must map at least one source dimension to a target dimension. You can run a link only if it is in a ready state.

An Incomplete status icon  appears when the link definition is not defined correctly or when it is incomplete. You cannot run a link if the load definition is incomplete. The link definition may not be complete because

- the source or target tabs are not selected
- columns or rows are not marked as description
- extra source or target dimensions exist

Creating a Local Link

A local link is a mapping between a set of data that you want to either import into your e.List item from an external source or move data already in the grid to a different location in the open e.List item. A local link is defined by its source type, target tab, and source and mapping definitions.

You can create link definitions using external data sources or tabs in the active grid. You can modify and distribute link definitions after creation. You can store link definitions as an XML file.

After you run a link that includes commentary, annotation, or attached documents, the target will have the same value and commentary as the source. This means that commentary in the target is removed if there is no commentary in the source. If you target a cell with more than one source cell, it will contain the aggregated value and the commentary from all the source cells. If you select only one type of commentary in the link, then the other type of commentary is not affected by running the link. You will not have multiple copies of commentary in target cells if you rerun the link.

You can also add previously created XML and .cld link definitions by clicking **Add**.

From the **File** menu, select **Get Data** and click **New** to create a new local link. You can load data from the following types of sources:

- **Contributor Tab**

You create a Contributor-to-Contributor link when you want to move data in the active Contributor grid. You can move data inside a single tab or from one tab to another.

- **ASCII**

You create ASCII links when you want to load data from text files.

- **Excel**

You create Excel links when you want to load data from a single worksheet from an Excel workbook. You can also use an .xls file that was created using the Export for Excel.

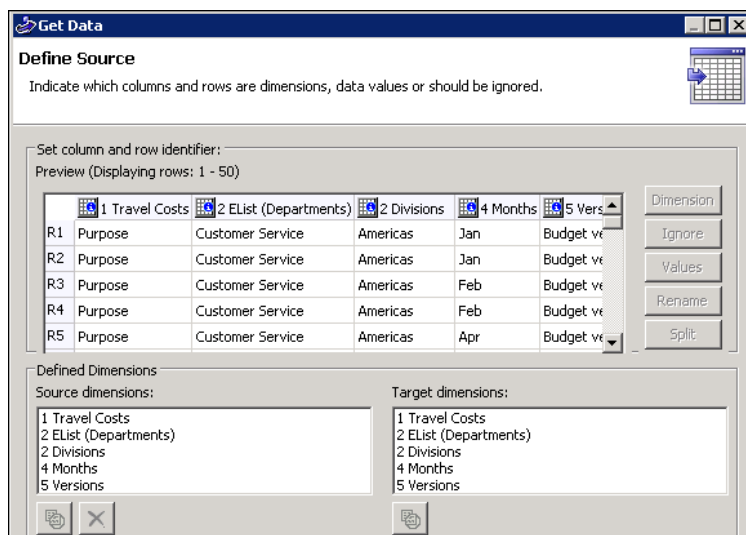
Important: When using an Excel file as the source, you may get unpredictable results if you use breakback on an item in Excel that is calculated in Contributor. For more information about breakback, see "[Calculated Cells, Breakbacks, and Holds](#)" (p. 16).

With the breakback functionality, cell data takes precedence over the breakback. If you import an Excel file with blank cells, they will be treated as zeros. When you perform a breakback, you will receive unexpected results.



Defining the Source

When creating a local link using an ASCII or Excel file you must define the source by renaming the rows and columns and by identifying which rows and columns are dimensions, or data values, and what should be ignored during the import.

For example, using the `go_expenses_contributor` sample data, the ASCII file `travel.txt` is imported using Get Data. The columns of the tab delimited file are renamed using the target dimensions and the dimension columns are marked.



Marking Dimensions and Values

The data you are importing must map to dimensions in the target. Mark the rows and columns as a dimension  to map to the target dimension or as a value. You can also select rows and columns to ignore  during the import.

Any row or column not marked as a dimension or value will appear as DATA in the source dimensions.

Renaming Rows or Columns

When you preview your Excel or ASCII source files, the columns are automatically renamed to C1, C2, C3 and rows are renamed to R1, R2, R3.

You can rename your columns and rows by clicking **Rename** and typing a custom name or by selecting a name from the target dimensions. Renaming rows and columns with the same name as target dimensions helps to identify which source and target dimensions match. You can then use the **Map All** feature.

You can also rename your columns by specifying the row that contains the column headers. If the first row contains the names, start your import from the second row.

Splitting a Column

You can split a column whose information must be mapped to two or more separate target dimensions. For example, you have a source dimension that lists dates in the format Jan-03, and two target dimensions, one for month and one for year. You must split the source dimension into two sub-dimensions to correctly load the data.

Note: You cannot split a dimension already marked as a Description.

Merging Dimensions

You can merge two or more source dimensions to map them to one target dimension. For example, you want to merge a source dimension for years (03) and a source dimension for months (Jan) into one dimension (Jan 03) and map it to the target dimension of months and years (Jan 03).

You can undo a split by merging the new dimensions.

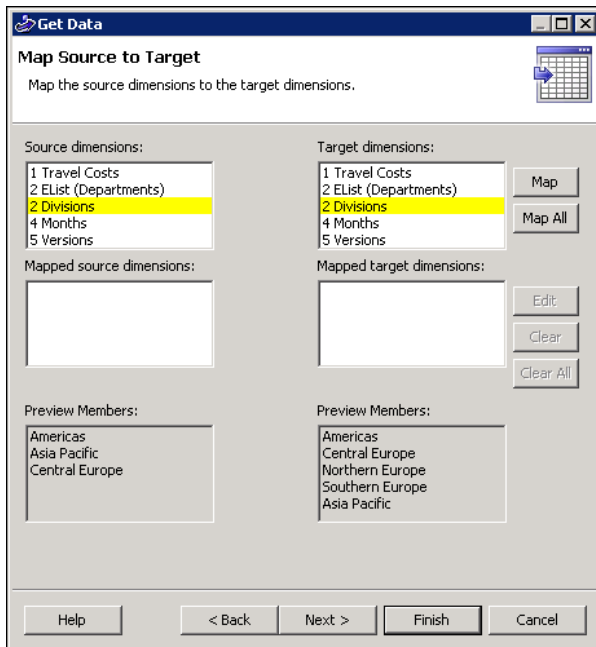
Note: You cannot merge two dimensions when either is already marked as Description.

Mapping Dimensions

Mapping creates relationships between one or more source dimensions and a target dimension. When all source and target dimensions are mapped, the load definition is ready.

When the source and target dimensions do not match, you have to manually map the dimensions. When the source and target dimensions have the same names, you can automatically map the dimensions.

Select the source and target dimensions and click **Map All** to automatically map all dimensions that have the same name. Select a source and target dimension and click **Map** to map the dimensions manually.



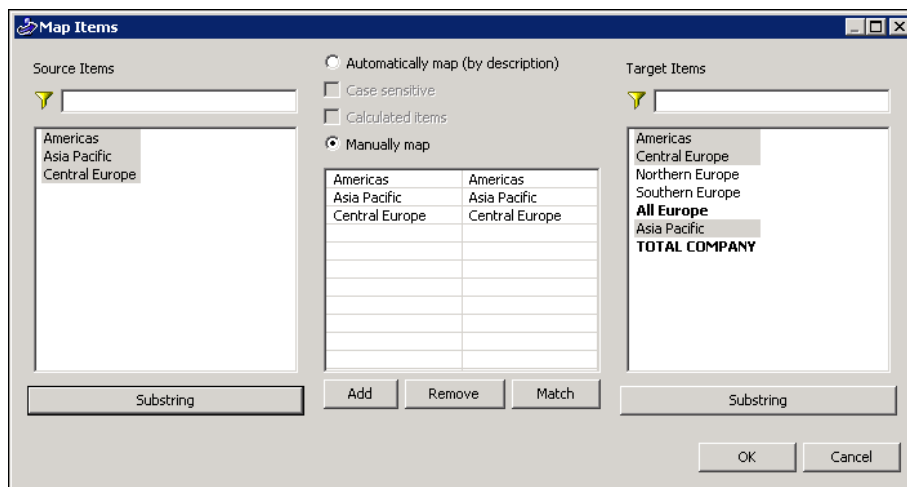
Automatically Mapping Dimensions

You can quickly map your source and target dimensions if the names of each already match. The **Map All** button is available only if you have at least one set of matching dimensions.

Manually Mapping Dimensions

If the items in the source and target dimensions do not match, a manual map is required. For example, you will have to create a manual map if the source item is Jan-08 and the target item is 1-08. If the items in a source or target of the manually mapped load are added, you must manually update the load.

You can select an item in the source and target dimension and click **Add**. If there are multiple matching items, click **Match**.



Filter Dimension Items by Characters


You can filter dimension items that appear in the Dimension Items list based on the first character or on more than one character in the item name.

Note: This filter only applies to items that appear in the list. It does not affect what gets loaded into the target.

Step

- In the **Map Items** dialog box, in the **Filter** box, enter the character or characters you want to filter on.

Only the items that begin with the character or character you entered in the filter box appear in the Dimension Items list.

Tip: To remove the filter, delete the characters in the **Filter** box .

Filter Dimension Items by Substrings

You can filter dimension items using a substring filter based on the character position. For example, you can filter items to just the third, fourth, and fifth characters of each item.

When you use a substring, all the items that match the substring are rolled up into one item. For example, if you have dimension items named Budget 1, Budget 2, and Budget 3 and if you applied

the substring BUD to the first three characters, all three items are rolled into one dimension item to be loaded into the target dimension.

Unlike filtering by characters, using a substring applies to what is included in the load as well as what is viewed in the **Dimension Items** list.

Steps

1. In the **Map Items** dialog box, click **Substring**.

The **Select substring** dialog box appears with the longest item name in the dimension list.

2. Clear the check boxes below the characters that you do not want to appear in the dimension list.

Tip: Drag the pointer to clear more than one check box at a time.

3. Click **OK**.

The dimension items are now filtered by the characters in the positions you selected.

Unmapped Dimensions

You must address all source dimensions, either by mapping to a target dimension or by selecting for inclusion on the **Unmapped source dimensions** dialog box. Otherwise the load will not be marked as complete and cannot be executed.

Use Local Links with Contributor for *Excel* and Classic Contributor

You can import local links from Contributor for *Excel* or the Classic Contributor Web Client or export links into those tools. Local links that you want to import and export between the Classic Contributor Client or Contributor for Microsoft Excel and the Contributor Web Client must be saved as link definition files (*.cld). You can save the link as XML if you are importing and exporting links using the Contributor Web Client.

Steps

1. To export a link, in the Get Data Wizard, click **Save As**.
2. Select a location and name for the link. Select the Link definition files (*.cld) file type.
3. Open the application in the tool in which you want to run the link, in the Get Data Wizard, click **Add**, and select the link you want to import.

Run a Local Link

To load data into a target tab, you must have edit or submit rights for that tab. You cannot load data into tabs that are read-only.

Steps

1. In the **Local Links** list, select the local link that you want to run.

Tip: You can control the order in which the local links run by adding them to the **Local Links** list in the desired order.

2. Click **Run**.
3. Click **OK** when the link is finished running.

System Links

You can run system links if the Contributor administrator grants you access to them. You cannot create a system link.

Steps

1. In the **System Links** list, select the system link that you want to run.
2. Click **Run**.

If errors exist, you are prompted to view or ignore them.

Chapter 4: Managing Changes to the Grid

You have the flexibility to arrange the grid and data organization, to suit your needs. You can work with many tabs at one time or freeze columns or rows for easier scrolling in a particular tab. You can also modify tab placement, data sorting, and zero suppression. The next time you open any e.List in the same application, your settings are retained.

Note: If the e.List you are working in changes on the server while you have it open, the cube order you are using will return to the default, as set by the administrator, after the update is complete.

If you want to revert back to the default grid or tab views, select **Reset Tabs only**, **Reset Grid only**, or **Reset both Tabs and Grid** from the **View** menu, **Reset Views**.

Tip: You can zoom in and out of the grid by clicking **Ctrl+ =** to zoom in and **Ctrl + -** to zoom out.

Working with Tabs

Tabs can be moved, reordered, and minimized or maximized. If you have more tabs than can be displayed in the window, the hidden tabs appear in the hidden tab control area indicated by a chevron **»**, and the number of hidden tabs. When you click on the chevron you can select a tab to view.

Tip: You can also use **Ctrl + Page Up** and **Ctrl + Page Down** to switch between tabs.

If you have multiple tabs torn off that have the same context dimensions, you can only view shared members of that dimension. Unique members of the context dimensions cannot be shown until the tabs are returned.

The active tab is blue while the inactive tabs appear gray.

Try It Yourself - Tear Off a Tab

You want to see the impact of a planned business trip on the overall corporate expenses.

To accomplish this, you will have to tear off the **Corporate Expenses** tab, also known as the reporting cube, so that you can see the **Travel Cost** and **Corporate Expenses** tabs together.

To follow this example, you must have the `go_expenses_contributor` sample installed. For information, see "[Contributor Sample](#)" (p. 7).

Steps

1. Grab the **Corporate Expenses** tab and drag it to the bottom of the grid, the curser will change to multiple folders, keep dragging the tab until you see the drop area highlighted and an arrow indicating the placement of the tab.

Now the tabs are displayed vertically.

2. Click on the **Travel Cost** tab to make it active.

3. Add data and press Enter to commit data in the **Travel Cost** tab. You will see the data updated in the **Corporate Expenses** tab.
4. To replace the torn tab, drag the tab to the center of the other tab area. The source tab returns to the tab area. You can also revert the view by selecting **Reset Tabs only** from the **View** menu, **Reset Views**.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year	
Purpose	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc	Misc		
No of Nights		79	82	95	64	62	71	104	108	125	110	90	87	1,077
Hotel per night		200	200	200	200	200	200	200	200	200	200	200	200	200
Meals & Ent per night		50	50	50	50	50	50	50	50	50	50	50	50	50
Accomodations		15,800	16,400	19,000	12,800	12,400	14,200	20,800	21,600	25,000	22,000	18,000	17,400	215,400
Meals & Entertainment		3,950	4,100	4,750	3,200	3,100	3,550	5,200	5,400	6,250	5,500	4,500	4,350	53,850

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
TOT_NONPERS Non-personnel expenses (total)	60,314	62,604	72,529	48,862	47,335	54,206	79,400	82,454	95,433	83,981	68,7
611000 Travel (sub-total)	60,314	62,604	72,529	48,862	47,335	54,206	79,400	82,454	95,433	83,981	68,7
611100 Travel: plane, train, bus	38,950	40,429	46,838	31,554	30,568	35,006	51,276	53,248	61,630	54,234	44,3
611300 Travel: vehicle rentals, taxis	1,614	1,675	1,941	1,307	1,266	1,450	2,124	2,206	2,553	2,247	1,8
611500 Travel: accomodations	15,800	16,400	19,000	12,800	12,400	14,200	20,800	21,600	25,000	22,000	18,0
611600 Travel: meals & entertainment	3,950	4,100	4,750	3,200	3,100	3,550	5,200	5,400	6,250	5,500	4,5

Try It Yourself - Maximize a Tab


You want to maximize a tab that has been torn-off to view the details.

You have the **Travel Cost** tab torn-off so that you can see the **Corporate Expenses** tab and the **Travel Cost** tab displayed vertically. You want to look at the whole **Travel Cost** tab without having to dock the tab back on the tab bar. You also want to easily minimize the tab so that the two tabs appear vertically again.

To follow this example, you must have the `go_expenses_contributor` sample installed. For more information, see "[Contributor Sample](#)" (p. 7).

Steps

1. On the **Travel Cost** tab, double-click on tab name.
The **Travel Cost** tab will maximize to take up the grid window.
2. To restore the display, double-click the tab name again.

Tip: If you minimize a torn-off tab it will stay in place, you can restore the tab by clicking the restore button .

Freezing a Pane

You can customize your grid to make it easier for you to view and add data without having to scroll or navigate through the pane.

To create a frozen section, select **Freeze Panes** from the **View** menu. You can fix cells on a row and column with vertical and horizontal scrolling. Crosshair lines appear to indicate the fixed area.

To remove the freezing, select **Freeze Panes** from the **View** menu, the crosshair lines are removed. You can also remove freezing by changing any of the following:

- numerical or dimensional sorting
- the order of dimensions
- collapsing or expanding dimensions
- zero suppression
- axis layout
- resetting views
- change context

Hiding Rows and Columns

You can hide individual or sequential selections of rows or columns or non-sequential selections. To select a group of non-sequential rows or columns, click the desired row or column and then Ctrl+click the additional rows or columns. Right-click the header of any selected row or column, click **Hide Selected**. The selected rows no longer appear in the grid.

To show hidden rows and column, right-click on any header and click **Show all hidden**. You cannot reveal specific rows or columns. You can also show hidden rows and columns by selecting **Reset Grid only** or **Reset both Tabs and Grid** from the **View** menu, **Reset Views**.

Sort Dimensions

The dimension bar shows the order of dimensions on the axes of the grid. To create a logical order of members in single dimension, you can sort alphabetically ascending or descending by row or column.

If you have more dimension than can be displayed on the dimension bar, the hidden dimensions appear in the hidden dimension control area indicated by a chevron **»**, and the number of hidden dimensions. Click on the chevron to select the dimension you would like to view.

Steps

1. On the grab handle for a dimension in a row or column on the grid, right-click and select **Sort** and then **Sort Ascending** or **Sort Descending**.

The hierarchical members of the dimension are also sorted. If you are viewing a hierarchical dimension as a list, all members will be listed alphabetically without hierarchy. To change the

layout of a dimension right-click on the grab handle for the dimension and select **Layout** and then select either **Hierarchical** or **List**.

2. To remove sorting, right-click on the grab handle and select **No Sort** from the **Sort** menu.

Stacking Dimensions

You can stack and reorganize dimensions to change how dimensions are displayed. You can reset all dimensions using **Reset Grid only** from **Reset Views** in the **View** menu. You can drag and drop dimensions from the dimension bar into other areas of the dimension bar or onto the grid, and organize them on the rows or columns to create the desired grid layout.

Try It Yourself - Stack a Dimension

You want to see the differences in budget versions for the cost of supplies and compare the budgets to costs for prior years. You will do this by stacking the versions dimension with the supply cost dimension on the rows.

To follow this example, you must have the go_expenses_contributor sample installed. For more information, see "[Contributor Sample](#)" (p. 7).

Steps

1. On the **Supply Costs** tab, click and drag the **5 Versions** dimension from the context section of the dimension bar to the right edge of the row axis. When you see the row axis become outlined to indicate the drop zone, release the mouse button and the dimension will be added to the stacked on the rows.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
Supplies (sub-total)	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: computer supplies	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: office supplies	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: fax & photocopies	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: catering	0	0	0	0	0	0	0	0	0	0	0	0	0


You can now see each supply type with the forecasts for budget version 1 and 2, and the actuals for the prior 2 years.

2. You can move dimensions on the rows or columns back to the dimension bar by selecting the dimension on the grab handle and dragging it onto the bar.

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 2	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies (sub-total)	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 2	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: computer supplies	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 2	0	0	0	0	0	0	0	0	0	0	0	0	0
Supplies: office supplies	Budget version 1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Budget version 2	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual prior year 1	0	0	0	0	0	0	0	0	0	0	0	0	0

Replacing Dimensions

You can replace dimensions on an axis by dragging and dropping an alternate dimension on top of another dimension. For example, you can drag a dimension from the column by clicking the grab handle of the dimension and moving it on top of a dimension on the row. When you see the replace drop zone, release the dimension.

Tip: You can swap  the rows and columns to view your data differently. For example, if the months are on the rows and marketing campaigns on the columns, you can swap the rows and columns to make it easier to view campaign costs over time.

Try It Yourself - Replace Dimensions

You would like to see the individual types of marketing for each campaign. To do this, you can swap the Marketing dimension with the Campaigns dimension on the rows.

To follow this example, you must have the go_expenses_contributor sample installed. For more information, see "[Contributor Sample](#)" (p. 7).

Steps

1. On the **Marketing** tab, select the grab handle of the **Campaign 1** dimension from the context.
2. Drag the dimension on top of the **1 Marketing** dimension on the rows. When you see the rows outlined, release the **Campaign 1** dimension. The source dimension now replaces the target dimension in the rows.

Chapter 4: Managing Changes to the Grid

The screenshot shows a web client interface with a grid for managing marketing costs. The grid has columns for months (Jan-Dec) and a 'Full Year' column. A dropdown menu is open on the left, listing categories like Advertising, Trade Shows, Seminars, Direct Mail, and Miscellaneous. The 'Marketing (sub-total)' row is highlighted.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full Year
Campaign Title													
Advertising													
Trade Shows													
Seminars													
Direct Mail													
Miscellaneous													
Marketing (sub-total)													

Chapter 5: Exporting Data

You can export data to Microsoft Excel to create reports and charts, and to manipulate data. You can also export data into a text file.

Quick Export to Excel

You can quickly export the data in the active tab to Excel. To access the quick export, select **Export**, then **Quick Export** from the **File** menu or right-click in the grid and select **Quick Export** from the context menu. Excel opens with the data from the current tab, the file is stored in the temporary directory. You can import this data back into Contributor using **Quick Load** in **Get Data**. For more information, see "[Quick Load from Excel](#)" (p. 23).

Export to a Text File

You can export data from the active tab to a text file. To export to a text file, select **File**, **Export**, then **To Text File**, or right-click in the grid and select **Export to Text File** from the context menu. You can import data back into the grid.

Export to Excel Wizard

You can export data to Excel to take advantage of Excel functionality to manipulate your Contributor data.

Saved Selections

Selections are sets of data from an application grouped together to create specific reports. These selections can be made up of data from one or more tabs within your application.

Once selections are created and saved, they are called Saved Selections and are stored on the server.

Choose which selection option you want to use:

- **New Selection** - creates a new selection of data. You can choose to **Include Annotations**, **Merge Cells** to merge adjacent cells with the same value into a single cell, or **Run when Finished** to run the saved selection immediately when the export wizard is complete.

To reduce the number of pages in your report, use the **Merge Cells** option to stack two or more dimensions into one axis (row or column). You can stack dimensions to reduce the number of pages in your report by moving page dimensions to either rows or columns.

- **Edit Selection** - changes the structure of an existing selection.
- **Run Selection** - uses a previously saved selection without changing the structure. If the structure of a previously saved selection has changed significantly (because of a model change), that selection may not be compatible and would need to be recreated.

Reports

Reports are saved selections that have already been run.

You can import a new report, edit an existing report, or delete a report. Deleting a report does not remove it from the system it was saved on.

Choose which report option you want to use when running the report:

- **Prompt to Resolve Layout Issues** compares the data from the existing report with the current data. If there are layout differences such as added or deleted rows, columns, pages, or headers, you are prompted.
- **Ignore Layout Issues** ignores any layout issues between the existing report and the newly created report.
- **Generate Layout Issue Report** generates a report describing each structural difference between the model and the report.
- **Update Captions** updates row, column, and sheet caption strings from the model data.

Chapter 6: Work Offline

If you need to work in the Web Client, but you are temporarily unable to connect to a network, you can work offline if you have sufficient rights. For example, you can view and edit your plan while travelling.


Working offline should not be the standard working practice because reviewers cannot view the current data and planners cannot receive updates when new data is imported. Ideally, you should bring offline data online as soon as possible to keep the data changes visible.

If you take an e.List item offline, you can continue working online on other e.List items.

Take Work Offline

You can take an e.List offline while you are connected to a network, or if you have already opened an e.List then you can take it offline when you are not connected to a network. If you take an e.List offline while you are not connected to a network, it will automatically reconcile when you bring that item online.

Steps

1. Open the e.List item in the Web Client.
2. If you want to edit or annotate offline and you are not the current editor, click **Take Ownership** .
3. From the **File** menu, click **Work Offline**. This disconnects the server from this session while leaving the session open. You can now work with the e.List item offline. If you close the application while the e.List item is offline, and you restart it later, you will be asked if you want to take it online or continue working offline.

In the offline browser, when you click **Save**, it saves to the offline store and does not connect to the server. Any annotations become read-only and data changes color to indicate that it was saved. Also, attached documents are not available when working offline.

Open the Offline Browser

If the offline browser is closed, you can open it from the Start menu.

Steps

1. From the Start menu, click **Programs, IBM Cognos 8 Planning**, and then **Contributor Offline**.
2. In the **Offline Working - Cognos Planning - Contributor** dialog box, click the name of the application, then select the e.List item and click **OK**. You can now edit information offline.

When you bring an e.List item view back online, annotations can be edited.

Take Work Back Online

Changes made while offline are not saved to the server until you save or submit while online. When you bring an e.List item view back online, annotations can be edited and you can attached documents (if available).

If you are working with an e.List offline and then go back online, you do not have to bring it online in order to work with other e.Lists that are online. But it is recommended that you bring any e.Lists that you have worked with offline back online as soon as possible to ensure accurate data readings.

Steps

1. In the Web Client, click **File, Work Online**.
2. Click **Yes**.

The view you took offline opens with the current offline data. The data color reflects the changes between the current data and the data stored on the server.

3. To save or submit your changes to the server, do one of the following:
 - To save the changes you made while offline to the server, click **File**, and then click **Save**.
 - To submit the changes you made while offline to the server, click **File**, and then click **Submit**.

Chapter 7: Troubleshooting

This section identifies issues that may require troubleshooting and suggests solutions.

Get Data Troubleshooting

You can use the following solutions to troubleshoot problems you may encounter when using Get Data. For more information, see ["Importing Data" \(p. 23\)](#).

If you select to log errors during import, a reject file, with the name rejects<time>.txt, is created in c:\Documents and Settings\<user>\Application Data\CognosRCP\temp\contributor_<release>. This file is only created when using ASCII and Excel files as the source.

Cannot Access an Item in the Target Dimension

If a source dimension is manually mapped to a targeted dimension and you cannot access an item in the targeted dimension, it may be because the target item is either deleted from the model or hidden using access tables.

To correct this problem, map the source dimension item to another target dimension item or remove the manual map entry. Verify your access to the source and target dimensions.

Cannot Access a Dimension Item In the Target Cube

If an error message indicates that **Get Data** cannot access a dimension item in the cube, it may be because the target dimension was removed from the model or hidden using access tables.

To correct this problem, edit the load definition to manage the source dimension as an extra dimension or map the source dimension to another target dimension. Also, confirm your access to the target dimension.

Extra Source Dimension in a Contributor-To-Contributor Load

If an error message indicates that an extra source dimension exists in a Contributor-to-Contributor load, it may be because the load includes a source dimension item that was deleted from the model or hidden using access tables.

To correct this problem, edit the load definition to manage the extra source dimension by including at least one of its items.

Item Removed from the Target Dimension

If an error message indicates that an item was removed from the target dimension, it may be because an item was deleted from the model or hidden using access tables.

To correct this problem, edit the load definition to manage the extra target dimension by including at least one of the remaining items.

An Extra Target Dimension Exists

If an error message indicates that an extra target dimension exists, it may be because a new dimension was added to the target cube after a load definition was successfully completed. The load is then considered out of date or incomplete.

To correct this problem, edit the load definition to manage the newly added dimension as an extra target dimension and include at least one of its items.

Missing Source Dimension in a Contributor-To-Contributor Load

If an error message indicates that there is a missing source dimension in your Contributor-to-Contributor load, it may be because a source dimension was removed from the model or was hidden using access tables.

To correct this problem, edit the load definition to manage the target dimension that was mapped to the source dimension. Map it to another source dimension or treat it as an extra target dimension and include at least one of its items.

Additional Source Dimension Exists in a Contributor-To-Contributor Load

If an error message indicates that an additional source dimension exists in your Contributor-to-Contributor load, it may be because a dimension was added to the source after a load definition was successfully completed.

To correct this problem, edit the load definition to manage the new source dimension either by mapping it to an existing target dimension or treating it as an extra source dimension.

Target Cube is Read-Only

If an error message indicates that the target cube is read-only, it may be because the user has not taken ownership yet.

If a reviewer e.List item is open, the user may not have reviewer edit rights, or all cubes are specified as read-only using access tables.

Export for *Excel* Troubleshooting

Structural differences are discrepancies between the existing *Excel* report and the current model data within Contributor that will be used to refresh the report. If the two structures are different, a message will appear notifying you of the difference and ask you whether you want to resolve the difference.

If you choose

- **Yes**, a missing item is inserted into the worksheet or an unknown item is removed from the worksheet.
- **No**, the difference is maintained in the worksheet.
- **Cancel**, the refresh operation is aborted.

Glossary

breakback

A function that changes the value of variables to make a formula equal to a specified value.

commentary

In Cognos Planning, any additional information attached to Contributor cells, tabs, or e.List items, including both user annotations and attached files.

contribution

In Cognos Planning, data that is entered into an e.List in the Contributor application.

Contributor Administration Console

A tool that enables administrators to publish an Analyst business model to the Web, manage access settings and model distribution, and configure the user's view of the model.

cube

A multidimensional representation of data needed for online analytical processing, multidimensional reporting, or multidimensional planning applications.

current owner

In Contributor, the person who is editing or last opened an e.List item for edit.

dimension

In Cognos Planning, a list of related items such as Profit and Loss items, months, products, customers, and cost centers, including calculations. The rows, columns, and pages of a cube are created from dimensions.

In Cognos BI, a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or locations. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members or special categories.

D-link

In Analyst, a link that copies information in and out of cubes, and sometimes to and from text or ASCII files.

e.List

A hierarchical dimension which typically reflects the structure of the organization (for example, cost centers and profit centers). The e.List is the basis for the structure of a Contributor application.

extension

In Eclipse, the mechanism that a plug-in uses to extend the platform.

In Cognos Planning, a mechanism that extends the functionality of the Contributor Administration Console or Web Client.

hold

In Cognos Planning, a function that protects a cell against breakback.

lock

In IBM Cognos Planning, a function that prevents data being entered into cells whether by typing or via a D-Link.

offline grid

In Cognos Planning, the application that is used to access a section of an offline Contributor application. The purpose is to enable users to enter or view data while there is no network connection.

planner

In Cognos Planning, a person who enters data in the Contributor application in the Web client.

publish

In Cognos BI, to expose all or part of a Framework Manager model or Transformer PowerCube, through a package, to the Cognos server, so that the data can be used to create reports and other content.

In Cognos Planning, to copy the data from Contributor or Analyst to a data store, typically so that the data can be used for reporting purposes.

reconciliation

In Cognos Planning, a process that ensures that the copy of the Contributor application that the user accesses on the Web is up to date, for example, all data is imported.

reviewer

In Cognos Planning, a person who reviews the submissions of reviewers or planners.

Index

A

- Add command, [14](#)
- adding
 - links to annotations, [18](#)
- adding data, [11](#)
 - calculated cells, [16](#)
 - copy commands, [13](#)
 - validating, [20](#)
- annotating
 - cells, [17](#)
 - data, [17](#)
 - models, [17](#)
 - tabs, [17](#)
- annotations
 - adding links, [18](#)
 - audit, [19](#)
 - browse, [18](#)
 - user, [18](#)
 - viewing, [17](#)
- attach documents, [17](#)
- attached documents, [17](#)
 - attaching, [18](#)
- attaching a document, [18](#)
- audit annotations, [19](#)

B

- basic layout, layouts
 - basic, [12](#)
- best practices, [5](#)
- breakback, [16](#)
 - definition, [43](#)
- browse annotations, [18](#)

C

- calculated cells, [16](#)
 - entering data, [16](#)
- cells
 - annotating, [17](#)
 - validating, [20](#)
- Classic Contributor, [28](#)

- commentary
 - definition, [43](#)
- contributions, [7](#)
 - definition, [43](#)
- Contributor, [7](#)
 - workflow screen, [7](#)
- Contributor Administration Console
 - definition, [43](#)
- Contributor for Microsoft Excel, [28](#)
 - copy commands, [13](#)
- cubes
 - definition, [43](#)
- current owners
 - definition, [43](#)

D

- data
 - annotating, [17](#)
 - editing, [10](#)
 - rejecting, [10](#)
 - reviewing, [10](#)
 - submitting, [10](#)
 - submitting for review, [9](#)
 - validating, [20](#)
 - viewing, [11](#)
- data entry commands, [14](#), [17](#)
- data integrity
 - enforcing, [20](#)
- Decrease command, [14](#)
- dimensions
 - definition, [43](#)
 - sort, [33](#)
- Divide command, [14](#)
- D-Links
 - definition, [43](#)

E

- e.List items, [7](#)
 - rejecting, [10](#)
 - reviewing, [10](#)

Index

e.Lists

definition, [43](#)

editing

data, [10](#)

entering data

data entry commands, [14](#)

export links, [28](#)

extensions

definition, [43](#)

G

Grow commands, [14](#)

H

hold

definition, [44](#)

holds, [16](#)

I

IBM Cognos Planning - Contributor, [7](#)

workflow screen, [7](#)

import links, [28](#)

incomplete, [7](#)

Increase command, [14](#)

K

K command, [14](#)

L

links

adding to annotations, [18](#)

local links

import and export, [28](#)

lock

definition, [44](#)

locked, [7](#)

log on, [7](#)

M

M command, [14](#)

models

annotating, [17](#)

modifying views, [11](#)

multi-e.List item views, [7](#)

Multiply command, [14](#)

N

nested layout, layouts

nested, [12](#)

not started, [7](#)

O

offline grids

definition, [44](#)

offline working, [39](#)

online working, [40](#)

P

Percent command, [14](#)

planners

definition, [44](#)

Power command, [14](#)

publishing

definition, [44](#)

Q

quick commands

copy commands, [13](#)

data entry commands, [14](#)

R

ready, [7](#)

reconciliation

definition, [44](#)

refresh, [37](#)

reject, [7](#)

rejecting

data, [10](#)

e.List items, [10](#)

Reset command, [14](#)

reviewers

definition, [44](#)

reviewing e.List items, [10](#)

editing, [10](#)

rejecting, [10](#)

S

sorting dimensions, [33](#)

submitting

data for review, [9](#)

submitting data, [10](#)

Subtract command, [14](#)

T

- table
 - workflow screen, 7
- tabs
 - annotating, 17
- take ownership, 11
- tree
 - workflow screen, 7

Troubleshooting

- additional source dimension exists in a Contributor-To-Contributor load, 42
- an extra target dimension exists, 42
- cannot access a dimension item in the target cube, 41
- cannot access an item in the target dimension, 41
- extra source dimension in a Contributor-To-Contributor load, 41
- item removed from the target dimension, 41
- missing source dimension in a Contributor-To-Contributor load, 42
- target cube is read-only, 42

U

- Update command, 20
- users
 - annotations, 18

V

- Validate Data command, 20
- validation of data, 20
- viewing
 - annotation links, 18
 - annotations, 17
 - data, 11
- viewing data
 - modifying views, 11
- views
 - modifying, 11

W

- workflow screen, 7
 - Contributions, 7
 - e.List items, 7
 - multi-e.List item views, 7
 - reviews, 7
 - table, 7
 - tree, 7

- working
 - offline, 39
 - online, 40
- work in progress, 7

Z

- Zero command, 14