IBM Cognos TM1

Version 9.5.2

Contributor User Guide

Product Information

This document applies to IBM Cognos TM1 Version 9.5.2 and may also apply to subsequent releases. To check for newer versions of this document, visit the IBM Cognos Information Centers (http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp).

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Introduction

This guide describes how to use the IBM® Cognos® TM1® Contributor to review and edit managed planning applications.

Audience

This guide is intended for financial analysts who need to review and edit workflow plans that have been created using IBM® Cognos® TM1® Contributor Administration.

Finding information

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

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

Samples disclaimer

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Accessibility features

This product does not currently support accessibility features that help users with a physical disability, such as restricted mobility or limited vision, to use this product.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Chapter 1: Getting Started with IBM Cognos TM1 Contributor

IBM® Cognos® TM1® Contributor streamlines data collection and workflow management. It eliminates problems with errors, version control, and timeliness that characterize decentralized planning processes.

Set Preferences

Specify preferences for IBM® Cognos® TM1® Contributor, including the number of entries in the list view, type of separator, and style. You can also change the layout of the view and regional options including language and time zones.

Steps

1. Open a Web browser. Type the Web address supplied by your administrator in the address bar, typically *http://<server_name>:<port_number>/pmpsvc*
2. Type in your user ID and password and click **OK**.
3. Click the **My Preferences** button  and specify the settings you want to change.

Open TM1 Contributor

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

Steps

1. Open a Web browser. Type the Web address supplied by your administrator in the address bar, typically *http://<server_name>:<port_number>/pmpsvc*
2. Type in your user ID and password and click **OK**.
3. Click on the application to which you want to contribute.

   On the workflow page, you see a graphical overview of all the areas for which you are responsible and the status of the data.
4. To start using TM1Contributor, in the tree on the left side of the screen, expand the approval hierarchy tree to select a node or click on a node in the table.

   Tip: To see the details panel for more information about a node, click the blue down arrow.

Workflow

The Workflow screen displays when you log on. 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 and reviewing. The exact items you see in the tree depend on your specific rights in the application. When you click an item in the tree, a table with the details for the item displays on the right side of the screen.

An item in the tree or table is known as a node. Typical examples are Sales Division, Marketing Division, Development Division, and Cost Center. The 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
	Available The node has not been opened and the data has not been changed or saved.
	Reserved The user has taken ownership of the node and data in this state can be submitted for review.
	Locked The data was submitted and the item was locked. Data in this state is read-only. If an item is rejected, its state returns to Reserved.
	Incomplete At least one item belonging to this item is **Available**, and at least one other item is in a state of **Reserved**, **Locked**, or **Ready**. Data in this state was aggregated. The **Incomplete** state applies only to review items.
	Ready All items belonging to the reviewer are locked. The data is ready to be submitted to the next level in the hierarchy.

Submit Data

You submit a node to the next reviewer in the planning model hierarchy when you are satisfied with the data it contains. After you submit the node, it is locked and you can make no further changes to the data. The reviewer can either accept or reject the changes that you made to the node.

To submit data, you must have submit rights. If your administrator has enabled multiple sandboxes you cannot submit your node from the workflow page. If you are using multiple sandboxes you must select the sandbox you want to submit in TM1® Contributor.

Depending on the current node you are working with and the rights you have for that node, you can submit a single leaf node, multiple leaf nodes or a consolidated node.

Step to submit a consolidated node or a single leaf node

- From the toolbar click the **Submit** icon .

Step to submit all leaf nodes under a consolidated node

- From the toolbar, click the **Submit leaf children** icon.

  Note: This action submits only the leaf nodes to which you have the appropriate rights.

If you are the owner of a consolidated node and related leaf nodes, and want to submit both the consolidated and leaf nodes at the same time, you must perform the steps separately.

Steps to submit all leaf nodes and a consolidated node

1. From the toolbar, click the **Submit leaf children** icon.
2. From the toolbar, click the **Submit** icon.

Review Data

You are responsible for reviewing the nodes as identified on the workflow page.

When you have appropriate rights to nodes, you can view them in any state. You can view more than one node at a time, but each node that you open from the Workflow page opens in a separate window. If you have the appropriate rights for a consolidated node, you can view, edit and submit data for all of the related leaf nodes right in the same grid window by using the approval dimension drop-down list to switch between the nodes in the hierarchy.

When a node has been submitted for review, it becomes **Locked** .

If you are not satisfied with the contents of a node, 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 node changes from **Locked** to **Reserved** .

When you have submitted all contribution nodes in a review, it has a Ready state . If you are satisfied with all the contents, submit the node .

Chapter 2: Working with Data

Adding or editing data in the web client allows you to submit information to your datastore. To modify data, your system administrator must grant you access. 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 **Available** or **Reserved** . The icons indicate the workflow state.

Parts of the Workspace

The workspace is comprised of the following parts:

- Tabs

  A separate tab represents each view in the application.

- Dimension Bar

  Toolbar area that shows the dimensions that are in the rows, columns, and context.

- Dimensions

  Each dimension displays as a collection of related data, such as products or dates.

- Grid

  The area where you add or edit data at the intersection of a column and row.

- Grab Handles

  Specific area where you can grab a dimension or tab to move it around the grid.

Tabs

A tab is a collection of dimensions and that represents a view. Each tab typically contains a specific dimension that is not common to other tabs. Usually, this dimension defines the function of the 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 and loss or balance sheet line items.

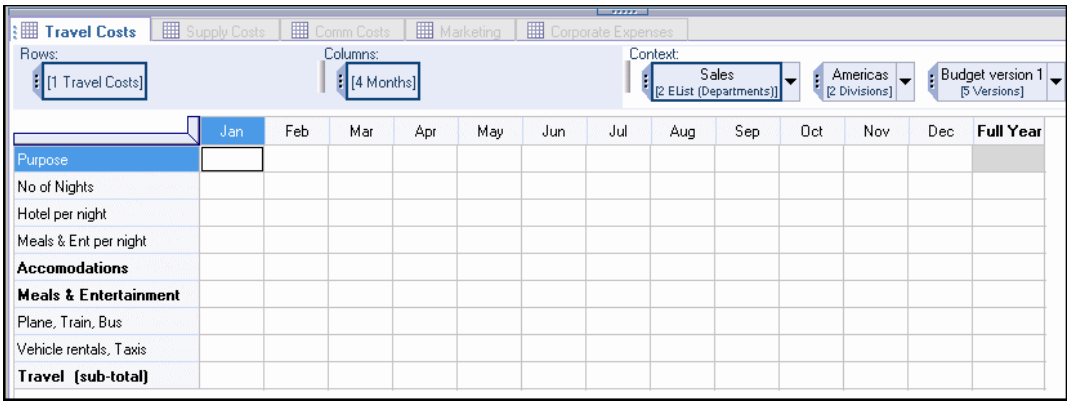
All dimensions within a tab determine the information shown in the grid. While dimensions in rows or columns display all of the items in their lists, context dimensions filter the grid to display only information for the active item.

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.

Basic Layout

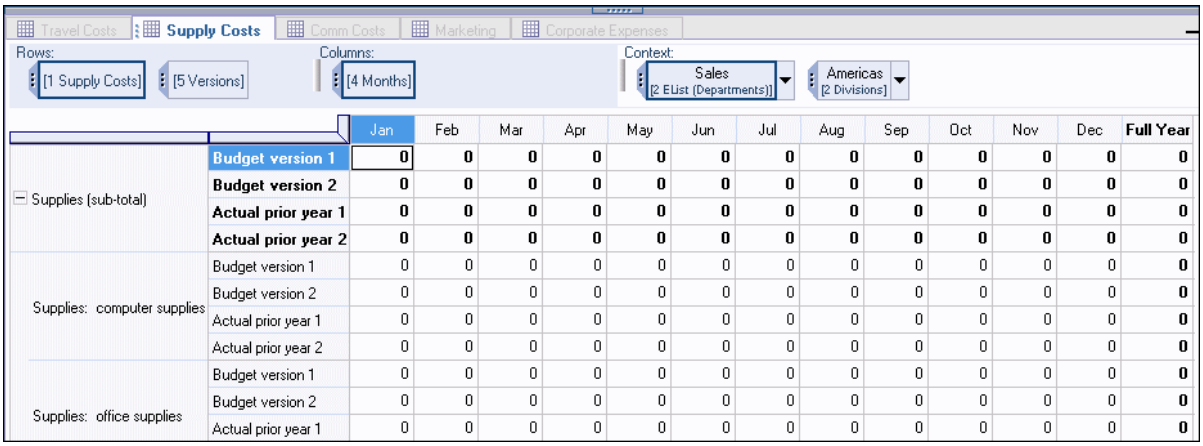
The basic layout has one row and one column dimension on the dimension bar.



	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 lets you view more specific information. 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: Each parent dimension item of a nested row or column contains repeated child dimension items. 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.

Using the toolbar

The IBM® Cognos® TM1® Contributor toolbar buttons provide shortcuts to commonly used commands.

The following table describes each button in the toolbar.

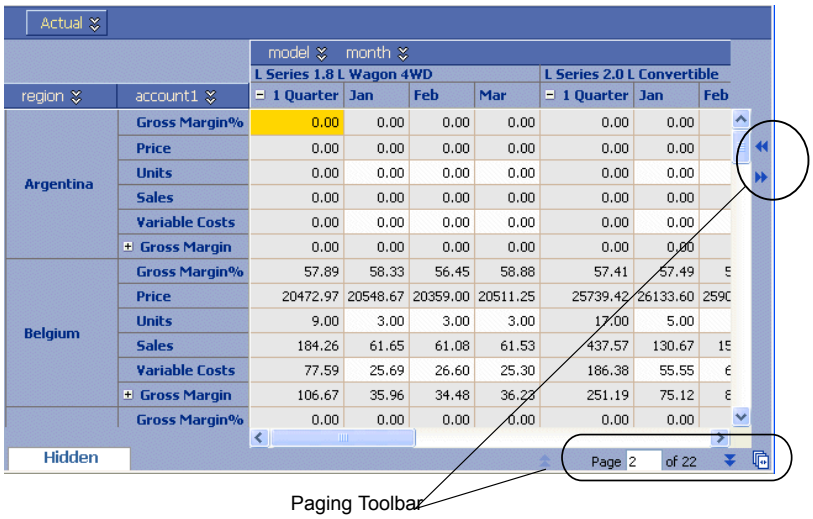
Icon	Button Name	Description
	Take ownership	To make changes to data, you must first take ownership.
	Submit	Submitting data makes it public, locks the node from further changes, and promotes the contribution to the reviewer.
	Submit leaf children	Submits all leaf nodes to which you have the appropriate rights for the current consolidated node.
	Reject	As a reviewer, you can reject a submitted contributions.
	Commit	Committing data makes it public, but does not lock it from additional changes.
	Export	Exports data in the following formats: **Slice to Excel** - Exports data and formulas (SUBNM and DBRW functions) to a new Excel spreadsheet. The spreadsheet maintains a connection with the server. To **Slice to Excel** you must have Microsoft® Excel installed on the web server. **Snapshot to Excel** - Exports data to a new Excel spreadsheet, excluding the formulas (SUBNM and DBRW functions). The spreadsheet does not maintain a connection with the server. **Export to PDF** - Exports data to a PDF file. You must install a PostScript printer for the Export to PDF option to work. For details, see the *Installation Guide*. For more information, see "Exporting Data" (p. 49).
	Copy	Copy data to duplicate it in other cells.
	Paste	Paste copied data into cells.

Icon	Button Name	Description
	Reset	Resets the data or layout. You can save or discard any changes you make to the data or layout. Any changes you make are kept the next time you open TM1 Contributor. Reset View: Reset Current View, Reset All Views, Reset Tabs, Reset Both Views and Tabs Reset Data
	Undo	Undo the last data change. Remember that many data change actions can have an effect beyond the cells that are visible. Consolidated values, rule-calculated values, cells included in Data spreading, or even cells in different views can all be changed as a result of making a data value change in one cell. When you undo these actions, all effected values are also changed, even in cells not visible on the active screen.
	Redo	Once a data change has been undone, you can restore the change.
	Swap rows and columns	Swap rows and columns to have the dimension on the row switch with the dimension on the column.
	Suppress Zero Values	There are two Suppress Zeros options: Suppresses Zeros on Rows Suppresses Zeros on Columns
	View Grid	Displays the data in a grid format.
	View Chart and Grid	Displays the data in both grid and chart formats.
	View Chart	Displays the data in a chart format.
	Chart Properties	Displays the Chart Properties menu options: Chart Type Color Palette Toggle Chart Legend Toggle 3D View Chart Properties

Icon	Button Name	Description
	Recalculate	Updates and recalculates data in the view. Data changes are not committed back to the server until the data is committed or submitted.
	Sandbox	Create sandboxes to work with data in different versions.

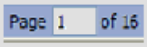
Navigating Pages

You can move from one part of a large cube view to another by navigating the pages. A Paging toolbar is provided with navigation buttons and a Page indicator, located in the lower-right corner. In the following cube view, the visible portion of the grid is the first of seven pages.



The following table contains the Paging toolbar buttons and indicator with their descriptions.

Button or Indicator	Name	Description
	Display Pages	Displays the TM1 View Page Layout dialog box with a layout of all pages. Click a page, and click **Goto Page** to navigate to a specific page. For example, click **Page 4**, and click **Goto Page** to navigate to page 4.
	Previous Page (Rows)	Shows the previous page of rows.
	Next Page (Rows)	Show the next page of rows.
	Next Page (Columns)	Shows the next page of columns.

Button or Indicator	Name	Description
	Previous Page (Columns)	Shows the previous page of columns.
	Page Indicator	Displays the current page and the total number of pages of cells in the view.

Editing and Replacing Data

You can edit data in leaf cells, providing you have Write access to those cells.

Leaf cells appear with a white background.

Steps

1. Edit a value in a white cell in one of the following two ways.
   - **Replace the value** - Click a value in a white cell and the cell becomes highlighted indicating that it is in Edit mode. You can then replace the existing value in the cell by typing over it.
   - **Edit the value** - Double-click a value in a white cell and the cell becomes bordered with white background and a blinking cursor. You can now selectively edit the existing value by using the left and right arrow keys on your keyboard to position the cursor within the value. You can also use the Backspace and Delete keys to remove single numbers from the value.
2. After entering a new number, press **Enter**. The grid refreshes to display the new data, all new and unsaved data displays blue.

   If you enter or change data and click on another cell, the grid does not refresh and the changed data displays green.

Copying and Pasting Data

Copy commands copy a value or operation to the left, right, above, or below rows and columns on a single tab. Copy commands only apply to cells of the same type as the original cell. These commands 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, however, do 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
<>	Copies left and right across the entire row	Example: <>5 Copies the number 5 left and right across a row
|^	Copies up and down in a column	Example: |^5 Copies the number 5 up and down in a column
|	Copies down	Example: 3| Copies the number 3 down the column
^	Copies up	Example: hold^ Holds the cell values up the column Example: 2>^ Copies the number 2 to the right and up the column

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. These commands 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

Command	Description	Action
M	Enters the value in millions.	Example: 10M Enters 10,000,000
Add, +	Adds a number to the cell value.	Example: Add50 Adds 50 from 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
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
GR	Grows cells by a percentage.	Example: GR>150:10 Increases the value by 10 percent starting with a value of 150.
Hold, Hol, H, HC	Holds the cell value from breakback calculations. HC holds the consolidated level.	
Release, Rel, RH, RC	Releases held cells.	
RA	Release all held cells.	

Using Shortcuts in Different Clients

The following table shows the shortcut keys available in the IBM® Cognos® TM1® Contributor client and the comparable shortcut keys available. Note that not all shortcuts available in Contrib-

utor are also available in TM1. See also the notes at the end of the table for important information about using shortcut keys.

Contributor	TM1
Add10	P+10
Sub10	P~10
Increase10	P%+10
Decrease10	P%~10
Percent10	P%10
Add10> or >Add10	R+>10
Sub10> or >Sub10	R~>10
Increase10> or >Increase10	P%+>10
Decrease10> or <Decrease10	P%~>10
Percent10> or >Percent10	P%>10
>10	R>10
10>	R>10
>10K	R>10000
>10M	R>10000000
10Grow100Compound>	GR>10:100
10Grow100Linear>	GR>10:100
10Gro100Com>	GR>10:100
10Gro100Lin>	GR>10:100
10G100C>	GR>10:100
10G100L>	GR>10:100
10Grow100>	GR>10:100

Contributor	TM1
1K	1000 (The number ending in K is multiplied by 1000 at the client end and returned to the server)
1M	1000000 (The number ending in M is multiplied by 1000000 at the client end and returned to the server)

- When a shortcut such as `10K` is entered, the numbers are multiplied by 1000, or 1000000 at the client end and then the shortcut is converted to the equivalent spreadcode.
- The TM1 spreadcodes cannot be used in combination with Contributor shortcuts. For example. `P%Add10` or `RPAdd10` are not allowed. Also, Contributor shortcuts cannot be used in combination with TM1 shortcuts. For example, `Add10Sub20` is an invalid entry.
- The Contributor shortcuts of Multiply, Divide, Power and Reset are not available in TM1.
- All Grow commands whether Compound or Linear, are converted to the TM1 GR spreadcode command. GR command can only do a Linear Growth
- The direction of spread can be entered at the start or the end of the shortcut. Shortcut strings with the direction in the middle are invalid. For example, `Add10>` or `>Add10` are correct, but `Add>10` or `Add1>0` are invalid.
- All shortcut codes are *not* case sensitive. For example, `add10`, `Add10`, or `aDD10` produce the same result.

Using Data Spreading

You can use data spreading to enter or edit numeric data using a predefined distribution method, called a data spread method. For example, you can evenly distribute a value across a range of cells, or increment all values in a range of cells by a percentage. For details on data spread methods, see "Using Data Spreading" in the IBM® Cognos® TM1® *User Guide*.

Steps

1. To spread data, right-click a cell and click **Data Spread**.
2. From the Spreading menu, select any data spread method.

   Note: TM1 Web saves the spread values to the server. You do not need to submit the data after TM1 Web completes the spread.

Applying a Data Spread across Multiple Leaf Nodes from a Consolidated Node

When you are the owner of a consolidated node and related leaf nodes, you can use data spreading from the consolidated node level to update the cell values in multiple leaf nodes without having to separately open and edit each leaf node. The new values are proportionately applied only to the

underlying leaf nodes to which you have rights. Cells in the leaf nodes to which you do not have rights are not updated.

For example, if you have ownership rights to the hierarchy for the North America, US and Canada nodes, you can perform a data spread on a consolidated cell in the North America node and the new values will be applied to the related cells in the US and Canada leaf nodes.

Steps

1. Open a consolidated node in the data grid.
2. Right-click on a consolidated cell and click **Data Spread**.
3. From the list, select a data spread method.

Excluding Cells from Data Spreading

You can apply a hold to cells to prevent those cells from being affected by data spreading. You can still edit held cells. The holds apply only to the user initiating the feature; other users can edit held cells.

Steps to Apply a Hold to a Single Cell or Range

1. Select the cell or range.
2. Right-click the cell or range.
3. Click **Holds**, **Hold Leaves**.

   Each held cell displays a red triangle in the lower-left corner as a visual indication that you applied a hold to that cell or range. When you log off, all holds are released.

Steps to Release a Hold on a Single Cell or Range

1. Select the cell or range of cells.
2. Right-click the cell or range.
3. Click **Holds**, **Release Leaf Holds**.

   The released cells can accept values from data spreading operations.

   Note: To release all holds that you applied to all cubes, right-click any cell in any cube, click **Holds**, **Release All Holds**.

Excluding Consolidations from Data Spreading

You can hold the value of a consolidation constant while adjusting the underlying leaf values. For example, when performing a what-if analysis you might want to hold a value constant while changing the values of the leaves.

When you apply a consolidation hold and change the value of its leaf elements, proportional spreading is applied to the remaining leaf values so that the consolidation value remains unchanged.

Steps to Apply a Consolidation Hold to a Single cell or Range

1. Select the cell or range.
2. Right-click the cell or range.
3. Click **Holds**, **Hold Consolidate**.

   Each held consolidation displays a red triangle in the lower-left corner of a cell as a visual indication that you applied a hold to that cell or range. When you log off, all holds are released.

Steps to Release a Consolidation Hold on a Single Cell or Range

1. Select the cell or range of cells.
2. Right-click the cell or range.
3. Click **Holds**, **Release Consolidate**.

   The consolidated value can now reflect any changes that you make to the underlying leaf values.

   Note: To release all holds that you applied to all cubes, right-click any cell in any cube, click **Holds**, **Release All Holds**.

Filtering a Cube View

You can filter data in a cube view that contains a single row dimension and one or more column dimensions. When you have two or more dimensions along the columns, you can filter only from the innermost dimension, that is the dimension closest to the view grid.

Steps

1. Click the column element that contains the values that you want to filter.
2. Select a filter.
   - **Pre-defined filter** - Top 10, Bottom 10, Top 10 Percent, Bottom 10 Percent. The filter is immediately applied to the view.
   - **Advanced** - You can define a custom filter by setting filter parameters in the Filter dialog box, as described in the following steps.
3. Select a **Filter** type.

Filter Type	Description
TopCount	Filters the view to display only the largest n elements, where n is a number specified in the Value option.

Filter Type	Description
BottomCount	Filters the view to display only the smallest n elements, where n is a number specified in the Value option.
TopSum	Filters the view to display only the largest elements whose sum is greater than or equal to n, where n is a number specified in the Value option.
BottomSum	Filters the view to display only the smallest elements whose sum is greater than or equal to n, where n is a number specified in the Value option.
TopPercent	Filters the view to display only the largest elements whose sum is greater than or equal to n, where n is a percentage of the dimension total specified in the Value option.
BottomPercent	Filters the view to display only the smallest elements whose sum is greater than or equal to n, where n is a percentage of the dimension total specified in the Value option.

4. Enter a numeric value in the **Value** box.
5. Select a **Sort** order to display the dimension elements in the Cube Viewer in ascending or descending order.
6. Click **OK**.

   A small funnel icon displays next to the column element for which you created a filter.

   Note: To remove a filter, click the column element for which you created the filter, and click **Remove Filter**.

Drilling Through to Detailed Data

IBM® Cognos® TM1® Contributor provides drill-through capabilities that let you click on a cell in the grid and "drill-through" to detailed data, which provides additional information or context for the cell. The detailed data is usually an extract from a relational database or a cube view.

When you create a slice from a view, any drill-through options available in the source view are also available in the slice.

Steps

1. Right-click the cell for which you want to view detailed data.
2. Click **Drill**.

   If the cell is associated with a single source of detailed data, the data opens in a new window.

If the cell is associated with two or more sources of detailed data, a list of the data sources is displayed. Select the source you want to view and click **OK**.

When the detailed data resides in a cube, a new instance of the cube viewer opens, displaying the detailed data.

Using Sandboxes

Sandboxes allow you to work with your data in different versions, allowing you to add or modify it to see the results in your budget. Changes that you make in a sandbox are not made public until you commit, you can continue to work with your data until you are satisfied with the result. When you submit a sandbox, that sandbox becomes the default. Your administrator may have disabled sandboxes for your application.

You can have multiple sandboxes to work with different scenarios and view different data results. If you are working with multiple sandboxes, you must submit from IBM® Cognos® TM1® Contributor, you can not submit from the TM1 Workflow page.

Steps

1. Create a new sandbox by clicking the down arrow next to the sandbox button, and clicking **Create Sandbox**.
2. Click **Create new** to make a new sandbox or **Copy from existing sandbox** to use a sandbox that you have already created as the basis for a new sandbox. Type a name and click **OK**.
3. Select the sandbox that you want to use from the drop-down menu.

   To submit a sandbox, select the sandbox from the drop-down menu, and click the submit button from the toolbar.
4. To delete a sandbox, click the down arrow next to the sandbox button, and click **Delete Sandbox**.

Using TM1 Contributor and other interfaces in a single Application

IBM® Cognos®TM1®Contributor stores a user's data entry in a designated area of their Personal Workspace until it is either committed to the base TM1 model or reset (cleared). Likewise, when using other TM1 interfaces while in Personal Workspace Writeback Mode, data entry is stored in a designated area of the user's Personal Workspace until it is committed to the base TM1 model or reset. Uncommitted data in any interface can present problems for users expecting a consistent view of data across TM1 Contributor and other TM1 interfaces.

When using TM1 Contributor and another TM1 interface (Microsoft® Excel, Cube Viewer, TM1 Web) on a single TM1 Application the following rules apply:

Writeback mode	Interface	Committed data	Uncommitted data (displays in blue)
Personal Workspace	TM1 Contributor	Data entry made here can be viewed in all TM1 interfaces.	Data entry made in TM1 Contributor can be viewed in other interfaces if you have been assigned Sandbox Capability. See note below.
	Other TM1 Interfaces	Data entry made here can be viewed in all TM1 interfaces.	Data entry cannot be viewed by TM1 Contributor.
Direct	TM1 Contributor	Direct writeback mode is not available in TM1 Contributor.	
	Other TM1 Interfaces	All data entry can be viewed in other interfaces.	

Note: TM1 Contributor-created sandboxes display in the sandbox list as [<*sandbox name*>]_[<*approval hierarchy dimension name*>].[<*approval hierarchy selected element parent name^selected element name*>]_[<*contributor application guid*>]

Chapter 3: 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 node in the same application, your settings are retained.

Working with Tabs

You can move and reorder tabs. If you have more tabs than can fit in the window, the hidden tabs appear in the hidden tab control area. This area is indicated by a chevron **»**, and also displays the number of hidden tabs. When you click on the chevron you can select a tab to view.

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.

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, to see the Travel Cost and Corporate Expenses tabs together.

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** from the **Reset** menu on the toolbar.

Stacking Dimensions

You can stack and reorganize views to change how they are displayed. You can reset the grid by clicking the down arrow next to the **Reset** button and clicking **Reset View**. To reset data back to the previous save, click **Reset Data**. You can drag and drop views 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. Note that a view persists in memory only as long as the browser view from which it originates remains unchanged. If the browser cache is emptied, the view does not persist.

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.

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 is stacked on the rows.

   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.

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.

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.

Editing Subsets

A dimension can have thousands of elements. It is unlikely, however, that any view will require all elements from all dimensions. In most cases, you should limit the elements used in a view to those

that are required for a specific analysis of your data. The Subset Editor tool lets you define a subset for any dimension to limit the number of elements used in a view.

For best results, limit the number of elements that appear as title elements. That way, if you view the data over slower Internet connections, your data displays more efficiently.

Step

- Click the down arrow next to a dimension on the row or column. The subset editor opens.

  To open the subset editor for a context dimension, click the down arrow on the dimension and click the subset editor button  .

Building a Simple Subset

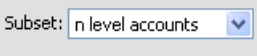
Use the Subset Editor simple mode to change the elements in a subset, and to view those elements immediately.

Steps

1. Click **Open Subset Editor**  next to any dimension.

   The simple Subset Editor opens.

   The following buttons are available in the Subset Editor.

Button	Name	Position
	Subset All	Displays all elements in the dimension. The list of all elements in a dimension is known as the All subset.
	Keep Selected Element(s)	Displays only the elements that you select, and removes all other elements from the current subset. However, the removed elements still exist in the dimension.
	Delete Selected Element(s)	Removes the elements that you select from the current subset.
	Find in Subset	Enables you to search for elements in the current subset based on the search text that you enter.
	Subset	Displays a list of subsets, and displays the subset that you select with elements of that subset.

2. In the Subset list, do one of the following:

- Select a named subset.
- Click **Subset All** to view all elements in the dimension.

The elements that are members of the selected subset are displayed.

3. Select one or more elements, and click **Keep Selected Element(s)**.

   The elements that you selected remain in the list, all other elements are removed.

4. Select one or more elements, and click **Delete Selected Element(s)** to remove elements from the list.

5. To search for elements in the current subset, click **Find in Subset** and type your search phrase. For details on using Find in Subset, see "Finding Elements" (p. 36).

6. Click **OK**.

   Your view is updated to include only the elements that you selected in your subset.

Displaying the Advanced Subset Editor

In the previous section, you worked with the simple Subset Editor to change the elements in a subset. If you want to perform advanced editing tasks on a subset, you must use the advanced Subset Editor.

Steps

1. Click **Subset Editor** next to any dimension.

   The simple Subset Editor opens.

2. Click **Advanced** at the bottom of the simple Subset Editor.

The advanced Subset Editor contains two panes.

- **Available Elements** (left pane) - Displays all the elements that are available to be added to your subset.
- **Subset** (right pane) - Displays only the actual members of the subset. When you save a subset, only the elements in the Subset pane are saved to the subset.

Using the Advanced Subset Editor Toolbar

The following table describes the Subset Editor toolbar buttons.

Button	Name	Description
	Save Subset	Saves only the elements that appear in the Subset list to the subset.
	Save Subset As	Saves only the elements that appear in the Subset list to the subset with a different name.
	Reload Subset	Reloads the original subset.

Button	Name	Description
	Subset All	Displays all the elements in the parent dimension.
	Cut, Copy and Paste	Cuts, copies, and pastes the selected elements of a subset.
	Keep Selected Elements	Keeps elements that you select for the subset.
	Delete Selected Elements	Removes elements that you select from the subset.
	Filter Subset	Allows you to select a group of elements in a subset that have related characteristics. You can filter elements in these ways: • Filter by Level • Filter by Attribute • Filter by Expression
	Sort Subset	Lets you sort a subset in several ways: • Sort Ascending • Sort Descending • Sort Hierarchically • Sort by Index Ascending • Sort by Index Descending
	Tree Expand	Expands the tree in several ways: • Drill Down Selected Consolidations - Expands the selected consolidation one level. • Expand Selected Consolidations - Expands the selected consolidation, showing all descendents. • Expand Tree Fully - Expands the entire hierarchy, showing all children of all parents.

Button	Name	Description
	Tree Collapse	Collapses the tree in two ways: • Collapse Selected Consolidations - Collapses the expanded consolidation, hiding all descendents. • Collapse Tree Fully - Collapses the entire hierarchy.
	Insert Parents of Selected Elements	Inserts the parent of the selected element immediately above that element in the hierarchy tree.
	Expand Above	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.
	Create Custom Consolidation	Allows you to build consolidated elements on the fly when working with a view. For details, see "Creating Custom Consolidations" (p. 39).
	Find in Subset	Enables you to search for elements in the current subset based on the search text you enter.

Moving Elements

You can move elements from the Available Elements pane to the Subset pane using a drag-and-drop operation.

If you click Other Revenue in the Available Elements pane, you could drag the element to beneath Sales in the Subset pane.

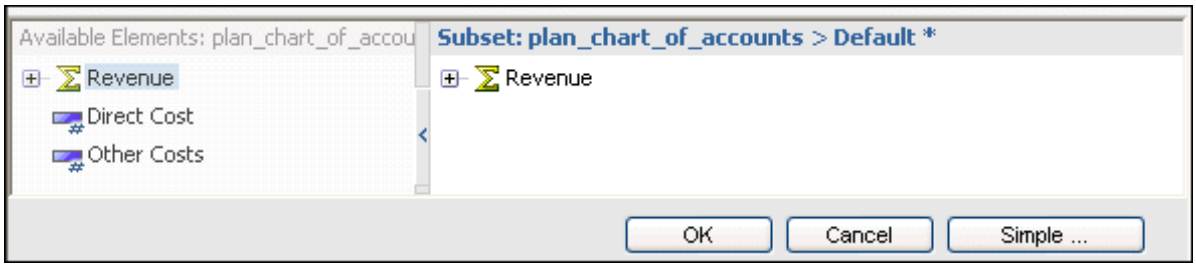
The line beneath the Sales element indicates that the Other Revenue element will appear beneath Sales.

Moving Consolidations

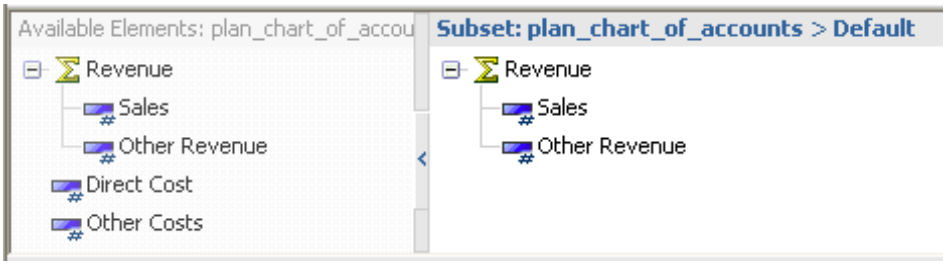
You can move a consolidation from the Available Elements pane to the Subset pane using a drag-and-drop operation. When you move a consolidated element, the children of the consolidation also move.

For this example, suppose you have a consolidation element named Revenue.

If you select Revenue, and drag it to the Subset pane, a collapsed consolidation is added to the Subset pane.



If you expand Revenue in the Available Elements pane, and select the consolidation and its children, you can drag the consolidation to the Subset pane. The expanded consolidation is added to the Subset pane.



In both of the above examples, the Revenue consolidation and its children are added to the Subset list. However, the state of the consolidation in the Subset list reflects the way the consolidation displays. In the first example, Revenue displays as a collapsed consolidation. In the second example, Revenue displays as an expanded consolidation and its children will be visible.

Keeping Elements

You can reduce the list of elements in the Subset pane to only those elements you want to keep in your subset. In this case all other elements are removed from the subset.

Note: You can reduce the size of the Available Elements list to narrow your search for elements to add to your subset, but this has no effect on the elements in the Subset list.

Steps

1. Select the elements that you want to keep in the Subset list.
2. Click **Keep Selected Element(s)** .

   Only the elements that you selected to keep remain visible in the Subset list.
3. Click **Save Subset** to save the subset.

Deleting Elements

You can remove selected elements from the Subset pane.

Steps

1. Select one or more elements in the Subset pane.
2. Click **Delete Selected Element(s)** .

The selected elements are removed from the Subset pane. The removed elements still exist in the dimension.

Note: To display all subset elements that you removed, click **Subset All** .

Filtering Elements

You can filter elements in either the Available Elements pane or Subset pane with these options:

- **Filter by Attribute** - Displays only the elements that match an attribute that you specify.
- **Filter by Level** - Displays only the elements that match a level in the element hierarchy.
- **Filter by Expression** - Displays only the elements that match a pattern.

Filtering by Attribute

The following steps illustrate how to filter elements by attribute value.

Steps

1. Click **Filter Subset**, and click **Filter by Attribute**.
2. In the **Select Attribute** list, select an attribute.
3. In the **Select value to match** list, select a value.
4. Click **OK**.

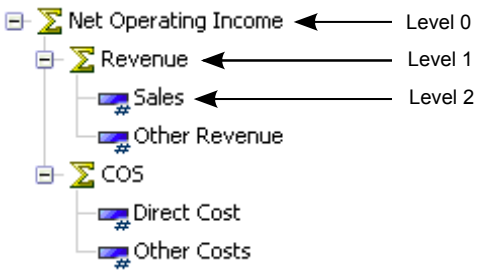
All subset elements whose selected attribute matches this value remain in the element list. All subset elements whose selected attribute does not match the value are removed from the element list.

Filtering by Level

The Subset Editor lets you filter elements so that only elements belonging to one or more specified hierarchy levels remain.

Consider the following example of a three-level hierarchy.

In this example, you start with the subset shown in the figure, and then eliminate all elements from the subset except those at Level 1.



Steps

1. Click **Filter Subset**, and click **Filter by Level**.
2. Click a level in the list, and click **OK**.

For example, if you filtered by **Level 1**, the following level 1 subset elements remain in the Subset list:

- Revenue
- COS

Filtering by Expression

The Subset Editor lets you filter elements so that only elements matching a specified search pattern remain.

For example, suppose you have the following list of elements in either the Available Elements pane or Subset pane.

- Sales
- Other Revenue
- Direct Cost
- Other Costs
- Bank Charges
- Board of Directors
- Employee Relations
- Printing
- Seminars and Continuing Ed.
- Taxes and Licenses
- Office Expense
- Postage
- Rent

Now suppose you want to reduce this list to those elements that contain the word 'cost'.

Steps

1. Click **Filter Subset** and click **Filter by Wildcard**.
2. Enter a pattern of alphanumeric characters in the **Enter Expression** box.

   You can use the following two wildcard characters in the **Enter Expression** box.

   - **Question mark** (**?**) - Placeholder for a single character
   - **Asterisk** (*) - Placeholder for one or more characters

   To isolate all elements whose names contain the string pattern *cost*, type the expression `'cost'` in the dialog box that opens.
3. Click **OK**.

The element list is trimmed to include only those elements that match the pattern.

Finding Elements

You can search for elements in either the Available Elements pane or Subset pane by using the Find in Subset toolbar. This feature performs a simple text search for elements that match a spelling pattern that you enter. This is especially useful when you want to find a specific element within a large list of elements.

Note: The Find in Subset feature does not support wildcard characters, such as the question mark (?) or asterisk (*), in your search text. Instead, an asterisk (*) wildcard character is inserted at the beginning and end of the spelling pattern that you enter so that it searches for any occurrence of the pattern in the element list.

For example, if you enter the spelling pattern ost, this converts to *ost* and matches such as Cost and Boston are found.

Steps

1. Click **Find in Subset** or press **Ctrl+F**.

   The Find in Subset toolbar opens in the Subset Editor.

2. Type a spelling pattern in the search box.

   A spelling pattern can include one or more alphanumeric characters, but should not include wildcard characters as described above.

   The list of elements is searched as you type a spelling pattern.

   - If one or more matching elements are found, the first matching element is located and highlighted in the list.
   - If a matching element is not found, the search box temporarily displays a red background.

   You can also start your search at any location within the element list by clicking on an element in that section of the list. The search begins from this new start point when you continue your search.

3. Click **Find Next** or **Find Previous** to navigate through the element list when more than one matching element is found.

   You can also use the following keyboard commands to navigate:

   - Press **F3** or press **ENTER** to find the next matching element.
   - Press **SHIFT+F3** or press **SHIFT+ENTER** to find the previous element.

   If a next or previous matching element is not found, the search box temporarily displays a red background, and the search cycles through the list again.

4. Click **Close the Findbar** to close the **Find in Subset** toolbar.

Sorting Elements

You can sort all elements in either the Available Elements pane or Subset pane.

Step

- To sort subset elements, click **Sort Subset** and select a sort option.

Sort Option	Sort Order
Sort Ascending	Ascending order from A to Z, 0-9.
Sort Descending	Descending order from Z to A, 9-0.
Sort Hierarchically	All children appear beneath their parents.
Sort by Index Ascending	Dimension index, starting at 1.
Sort by Index Descending	Dimension index, starting at the highest index in the dimension.

Expanding and Collapsing Consolidations

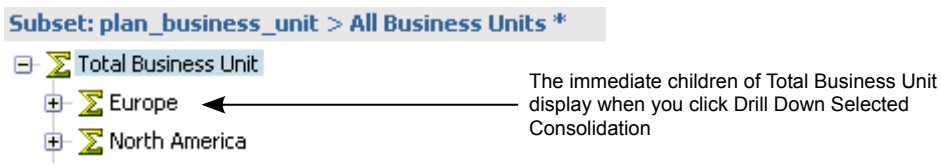
You can expand a consolidation in the Subset Editor to display the immediate children or all descendents of the consolidation. You can apply the following procedures to elements in either the Available Elements pane or the Subset pane of the Subset Editor.

Expanding a Consolidation

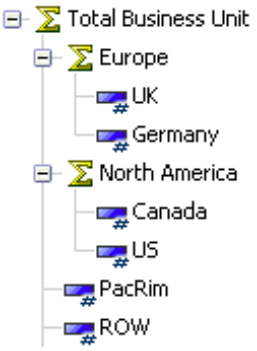
The following steps illustrate how to expand a consolidation.

Steps

1. Select the consolidations you want to expand.
2. Click **Tree Expand**.
3. Select one of the following:
   - Click **Drill Down Selected Consolidations** to view the immediate children of a consolidation. The following figure shows the result of drilling down on the Total Business Unit consolidation.



   - Click **Expand Selected Consolidations** to view all descendents of a consolidation. The following figure shows the result of expanding the Total Business Unit consolidation.



- Click **Expand Tree Fully** to view all descendents of all parents in the dimension hierarchy.

Collapsing a Consolidation

The following steps illustrate how to collapse expanded consolidations.

Steps

1. Select the expanded consolidations you want to collapse.
2. Click **Tree Collapse** .
3. Click **Collapse Selected Consolidations**.

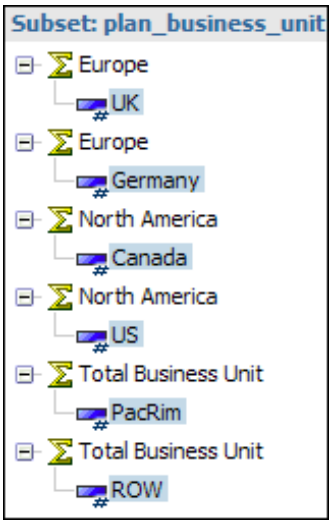
   Note: To close all expanded consolidations in the subset, click **Tree Collapse,** and click **Collapse Tree Fully**.

Inserting Parents

You can insert the immediate parent of a selected element directly above that element in the Subset Editor.

For example, consider the following example showing several leaf elements.

If you select all elements, and click **Insert Parents of Selected Elements** , the immediate parents of all selected elements are inserted, as shown in the following example.



Creating Custom Consolidations

When working with a view, you can create custom consolidations from

- Existing subsets
- Selected subset elements

Creating a Custom Consolidation from an Existing Subset

You can create a custom consolidation by inserting an existing subset into the current subset. The existing subset then becomes a custom consolidation within the current subset.

Steps

1. Open the **Subset Editor** for a dimension.
2. In the simple **Subset Editor** window, click **Advanced** to open the advanced **Subset Editor**.
3. Define a subset in the **Subset** pane.
4. Click **Create Custom Consolidation** and click **Create Consolidation from Subset**.
5. Select the existing subset that you want to insert into the current subset as a custom consolidation.

   The selected subset is inserted into the current subset as a custom consolidation.
6. If necessary, click **Save Subset** or **Save Subset As** to save the current subset.
7. Click **OK**.

The subset with the new custom consolidation opens.

Creating a Custom Consolidation from Selected Elements

The following steps illustrate how to create a custom consolidation from selected elements in the Subset Editor.

Steps

1. Open the **Subset Editor** for a dimension.
2. In the simple **Subset Editor** window, click **Advanced** to open the advanced **Subset Editor**.
3. In the Subset pane, select the elements that you want to include in the custom consolidation.
4. Click **Create Custom Consolidation,** and click **Create Consolidation from Selected Elements**.

   You have now created a custom consolidation that contains the elements that you selected in step 2.

   The custom consolidation the name **}ROLLUP_ #** is assigned, where **#** starts at zero and increases by one for each custom consolidation that you create during a server session.
5. Click **OK** to view the new custom consolidation.

Chapter 4: Working with Charts

Follow these steps to view a chart in a web-based client.

Steps

1. Open a view.
2. Do one of the following to view a chart:
   - Click **View Chart** to view cube data in chart format only.

     A column chart, the default chart type, is displayed.
   - Click **View Chart and Grid** to view cube data in both chart and grid format.

     A grid is displayed at the top, and a column chart, the default chart type, is displayed at the bottom.
   - Click **View Grid** to view cube data in grid format only.

Changing the Chart Type, Colors, Legend, and 3D View

You can change the chart type, colors, legend, and 3D view elements on the fly from the Chart Properties menu.

Follow the steps below to change the chart type, colors, legend, and 3D view.

Steps

1. Click **Chart Properties** on the toolbar.
2. Select any of the following menu commands to change the chart.

Menu Option	Description
Chart Type	The default chart is a column chart. Select a different chart type.
Color Palette	The default color palette is red, bright green, blue, and yellow with a bright blue background. Select a different color palette.
Toggle Chart Legend	By default, a legend displays, you can hide the legend.
Toggle 3D View	By default, a chart is two-dimensional. You can switch to a three-dimensional view of the chart.

Changing Chart Properties

You can edit and format the following chart properties to give your chart a professional look.

- **Chart** - Appearance, chart type, title, and title placement
- **Legend** - Style, display or hide legend, display legend inside plot area, and placement
- **3D** - Display or hide 3-D view, right angle axes, series depth, rotation, and perspective
- **Labels** - Type, angle, font, color, position, format, and precision
- **X and Y-axis** - Display or hide axis, grids, strips, reversed, side margin, title, format, and precision
- **Appearance** - Chart background color and pattern, border, and line style

Follow the steps below to change any chart elements.

Steps

1. Click the **Chart Properties** button.
2. Click the **Chart Properties** menu option.

   The **Chart Properties** dialog box opens with seven tabs: Chart, Legend, 3D, Labels, X-axis, Y-axis, and Appearance.
3. Click any tabs and change the chart options.
4. Click **OK**.

   The chart is updated to reflect the options that you select.

   Note: If you do not want to save the changes to the chart, click **Cancel**.

Changing Basic Chart Properties

You can change the following chart options:

- **Appearance Style** - By default, the color scheme for a chart is dark green, blue, purple, and bright green. You can select a different color scheme.
- **Chart Type** - The default chart type is a column chart. You can select a different chart type.
- **Title** - You can add a title to your chart and place it in one of 12 locations on the chart.

Follow the steps below to change the chart.

Steps

1. Click the **Chart** tab in the **Chart Properties** dialog box.
2. In the **Appearance Style** list, select a color scheme that best suits both the data in the grid and your application.
3. In the **Chart Type** list, select a chart type.

4. Type text for your title in the **Title** box.

   Note: The size of your chart determines the title length. You might have to shorten the title or position the title in a location on the chart where the entire title can display.

5. Click a title placement option button to select a position for your title.

   The title placement option buttons to the right of the **Title** box control determines where the title displays in your chart. By default, the title displays at the top middle of the chart. Use the title placement option buttons to position the title at one of 12 positions around the chart.

6. Click **OK** to save your changes.

Changing the Chart Legend

You can change the following legend options:

- **Style** - Displays the legend in a column, row, or table format.
- **Generic** - By default, the legend displays on the chart. You can hide the legend. Also by default, the legend displays outside the plot area. You can place the legend inside the plot area.
- **Placement** - By default, the legend displays in the upper right corner of the chart . You can place the legend in one of 12 locations in the chart.

Follow the steps below to change the legend.

Steps

1. Click the **Legend** tab in the **Chart Properties** dialog box.

   The Legend tab contains three options: Style, Generic, and Placement.

2. Select one of the following **Style** options.
   - **Column** - Arranges the legend keys in a vertical column format.
   - **Row** - Arranges the legend keys in a horizontal row format.
   - **Table** - Arranges the legend keys in a table format with columns and rows.

3. Select a **Generic** option.
   - **Show Legend** - By default, a legend displays on the chart. Clearing this option hides the legend.
   - **Place Inside Plot Area** - By default, the legend displays outside the chart plot area. If you select this option, the legend displays inside the chart plot area.

4. Click a **Placement** option to position the legend at one of 12 positions around the chart.

Changing the 3D Style

You can change the 3D view with the following options:

- **Generic** - Display or hide the 3D view, and display the chart in a right-angle axes (oblique) format.
- **3D Series** - Display the series in a clustered arrangement, and specify the gap and gap depth of the series.
- **Rotation** - Specify the horizontal and vertical degrees of rotation for the axes of the chart.
- **Other** - Specify the perspective to enlarge the parts of the chart that are closest to you, and shrink the parts that are farther away.

Follow the steps below to change the 3D view.

Steps

1. Click the **3D** tab in the **Chart Properties** dialog box.

   The 3D tab options include: Generic, 3D Series, Rotation, and Perspective.
2. Select the **Enable 3D** check box to display the chart in a 3D format.
3. If you clear the **Clustered** check box in the 3D Series section, the columns that represent the data series are no longer clustered together.
4. Select the **Clustered** check box, and enter values in the **Depth** and **Gap Depth** boxes.

   The default value for the depth is 100 and the default value for the gap depth is 100.
5. Change the values in the **Rotation** section to change the horizontal and vertical axes of the chart.

   The default **Horizontal** rotation value is 10. The default **Vertical** rotation value is 15.
6. Change the value in the **Perspective** box to change the chart perspective.

   The default value for the chart perspective is 10. As you increase the perspective setting, parts of the chart that are closest to you are enlarged, while the portions that are farther away are shrunk.

Changing Chart Labels

You can change the following label options:

- **Generic** - Display data point labels and smart labels. Change the angle, font, and color of the labels.
- **Position** - Position the labels automatically or specify where you want them to appear on the data series in the chart.
- **Format and Precision** - Specify the format and decimal places for the label numbers.

Follow the steps below to label data elements.

Steps

1. Click the **Labels** tab in the **Chart Properties** dialog box.

2. Select the **Show Point Labels** check box to display labels for the value associated with the data series.
3. If you select the **Enable Smart Labels** check box, an arrow is inserted for any ambiguous point label value for a data series. The arrow makes it easier to depict which point label value associates with a data series.
4. Type a value in the **Angle** box to change the point labels angle on the chart.

   By default, the angle value of zero displays the labels horizontally. You can enter a value from -360 to 360 degrees. A 90 degree angle displays the labels vertically, facing left. A -90 degree angle displays the labels vertically, facing right.
5. Change the font for the labels:
   - Select **Click to select** in the **Font** box.

     The ChartFont dialog box opens.
   - Select a font, font style, size, and any effects.
   - Click **OK**.
6. In the **Color** list, select a color to change the color of the labels:
7. Click a **Position** option to place the labels relative to the top of the data series in the chart.

   The Auto option places the labels at the top of a data series.
8. Change the format and number of decimal places for the labels.

   By default, the format is **Number** and the precision is 0 decimal places. If you select Currency and 2, the labels display with a dollar sign and two decimal places.
   - In the **Format** list, select the format that matches your numeric data.
   - In the **Precision** list, select the number of decimal places for your numeric data.

Changing the X-axis and Y-axis

You can format the X-axis and Y-axis with these options:

- Axis - Displays or hides the X-axis or Y-axis, major gridlines, minor gridlines, interlaced strips, and side margin. Reverses the X-axis labels.
- Title - Lets you add a title to the X-axis or Y-axis and select a font for the title.
- Label Format and Precision - Lets you specify the number format and decimal places for the X-axis or Y-axis numbers.

Follow the steps below to format an axis.

Steps

1. Click the **X-axis** tab or the **Y-axis** tab in the **Chart Properties** dialog box.
2. Select or clear the following **Axis** options.

- **Visible** - Displays or hides the X-axis or Y-axis label. You enter the X-axis or Y-axis label text in the **Title** field.
- **Major Grids** - Displays or hides major gridlines.
- **Minor Grids** - Displays or hides minor gridlines.
- **Interlaced Strips** - Displays or hides interlaced strips.
- **Reversed** - Moves the Y-axis labels to the opposite side of the chart.
- **Side Margin** - Displays or hides a side margin.

3. Add a title to the X-axis or Y-axis and change the font for the title.
   - Type a title in the **Title** box.
   - Select **Click to select** in the **Font** box.

   The **ChartFont** dialog box opens.
   - Select a font, font style, font size, and any effects. Click **OK**.

   Note: The X-axis label replaces the name of the chart, which is usually the name of the view.
4. Change the format and number of decimal places for the X-axis or Y-axis labels.

   By default, the format is **General** and the precision is 0 decimal places. If you select **Currency** and **2**, the labels display with a dollar sign and two decimal places.
   - In the **Format** list, select a format that matches your numeric data.
   - In the **Precision** list, select the number of decimal places for your numerical data.

Changing the Appearance of Your Chart

You can change the following appearance options for your chart:

- **Background** - Change the background color and pattern of the chart.
- **Border and Line** - Change the style, color, and width of the lines and borders in the chart.

Follow the steps below to change the appearance of your chart.

Steps

1. Click the **Appearance** tab in the **Chart Properties** dialog box.
2. In the **Color** list, select a background color for your chart.
3. In the **Gradient** list, select a background gradient for your chart.
4. In the **Hatching** list, select a background pattern for your chart.
5. In the **Color #2** list, select a color to define a secondary color for the background.
6. Change the style, color, and width of the border around the outside of the chart plot area.

- In the Border and Line section, in the **Style** list, select the type of line pattern you want for the border.
- In the **Color** list, select a color for the border.
- Enter a width for the border in the **Width** box.

Expanding and Collapsing Consolidations in a Chart

When you display a chart in your view, you can expand and collapse consolidations in the chart.

- Right-click a consolidated data series and click **Drill Down** to reveal the immediate children of the consolidated element in the chart.
- Right-click a consolidated data series and click **Drill Up** to hide the immediate children of the consolidated element in the chart.

Drilling from a Chart

If your administrator has defined drill-through processes and rules for cube cells represented in a chart, you can drill through to associated data from the chart. For details on creating drill-through processes and rules, see the IBM® Cognos® TM1® *Developer Guide*.

If a chart component is associated with a single source of associated data, the data immediately opens on a new View tab. If the chart component is associated with a multiple sources of associated data, you are prompted to select a single source.

For example, follow these steps to execute a drill.

Steps

1. Click **View Chart** to display the chart.
2. Right-click a column in the chart and click **Drill Through**.
3. Select the source you want to view and click **Select**.

   The selected data opens on a new **View** tab.

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.

Note: If you export using either **Slice to Excel** or **Snapshot to Excel** and Microsoft Excel is not on the server, any charts present in the grid are not exported to the resulting worksheet. If you use **Export to PDF** your chart will show first, followed by your values.

Steps

1. Click **Export** .
2. Select an export format for the report:
   - **Slice to Excel** - Excel documents that retain a link to the server through TM1 functions. When you open the slice and connect to the server with which the slice is associated, the slice displays the current cube values, provided you are running Excel with the Perspectives add-in enabled.
   - **Snapshot to Excel** - Excel documents that contain numeric values reflecting the cube values at the moment the export occurred. Because snapshots do not retain a link to the server, the values are static, representing a snapshot of cube values at the moment of export.
   - **Export to PDF** - PDF documents that display cube values at the moment the export occurred.

   The Export dialog box opens.
3. Select the number of rows to export:
   - **Export rows in current page** - Exports all rows in the current page.
   - **Export rows from beginning to current page** - Exports the first row in the first page through the last row in the current page.
   - **Export all rows in the view** - Exports all rows from all pages.
4. Select the title dimensions that you want to include in the report.
5. Click **OK** to create the report.

   The report sheets are generated and prompts you to either open or save the report.
6. Do one of the following:
   - Click **Open** to open the report in a new browser window.
   - Click **Save** to save the report to disk.

   Note: By default, exporting a slice or snapshot report to Excel displays the report in a web browser window.

For details on configuring your computer to open reports into the full, stand-alone version of Excel, see the Microsoft support web site.

Additionally, if you want to use TM1 functionality with a slice that you export to Excel, you must open the slice in the stand-alone version of Excel and have a local version of Perspectives or Client installed on your computer.

Note: If you are experiencing problems exporting Excel or PDF files and you are using a WAN (Wide Area Network) server, you may need to reconfigure the security settings in Internet Explorer. For details, see the IBM® Cognos® TM1® *Operation Guide*.

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