IBM Cognos Planning Contributor Add-in for Microsoft® Excel

Version 10.1.0

User Guide

Product Information

This document applies to IBM Cognos Planning Version 10.1.0 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 document is intended for use with IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel. This guide describes how you can use Planning Contributor Add-in for Microsoft Excel to see the current state of your plan, and explains how to enter and review data.

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

IBM Cognos Planning Analyst

IBM® Cognos® Planning 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 Planning Contributor.

IBM Cognos Planning Contributor

IBM® Cognos® Planning 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 Customer Center (www.ibm.com/software/data/support/cognos_crc.html).

IBM Cognos Innovation Center

The IBM® 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 www.ibm.com/software/data/cognos/innovation-center/

Audience

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

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.

Accessibility features

To accommodate the largest number of users, we focus our accessibility support on plan contributors. IBM® Cognos® Planning provides accessible capabilities through the use of the Contributor Add-in for Microsoft® Excel component. While using Contributor Add-in for Microsoft Excel, plan users work in an Excel environment and can use the accessibility capabilities of Microsoft Excel. For details about accessibility in Microsoft Excel, go to the Microsoft Web site and search for "Voluntary Product Accessibility Template for Excel."

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.

Samples disclaimer

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Chapter 1: IBM Cognos Planning Contributor

IBM® Cognos® Planning Contributor streamlines data collection and workflow management. It eliminates the problems of 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 resellers, suppliers, and customers worldwide. Many users can work simultaneously because Contributor is optimized for end-user performance. The client requests data from the server only as needed and saves only data that has changed. Complex calculations are performed at the client, giving you quick response and sparing the server unnecessary traffic during high-use times.

Using an intranet or secure Internet connection, you review only what you need to review and enter data where you are authorized.

Note: You can only access IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel from the Workflow page if you are using Microsoft Internet Explorer. Regardless of Internet browser, you can access Contributor Add-in for Microsoft Excel from within Excel.

Contributor Fundamentals

This section explains what you see when you log on to IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel and provides information that you need to know before you use Planning Contributor Add-in for Microsoft Excel.

The Workflow Screen

The Workflow screen appears when you log on to IBM® Cognos® Planning Contributor. It consists of a tree, a table, and e.List items.

The Tree

The tree on the left side of the screen shows the areas that you are responsible for contributing to (Contributions) and reviewing (Reviews) in a hierarchical form. 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.

Each item in the tree has an icon that tells you 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
	Work in progress The data was saved but not submitted. You can change and submit data in this state.
	Locked The data was submitted and the e.List item was locked. Data can only be viewed in this state. If an e.List item is rejected, its state returns to Work in progress.
	Incomplete 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.
	Ready 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.
	Currently being edited or annotated The e.List item was opened for editing or annotating. An edit session is ended by the user closing the grid, or by submitting the e.List item.
	Out of date Data in the e.List item needs restructuring to reflect changes in the application, or system data must be imported.
	Currently being edited or annotated and is out of date.

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, an icon appears next to that item .

You can click the Excel button to open the e.List item using IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel if it is installed and configured.

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

e.List Items

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 123. The e.List item names depend on the design of your application.

You can open multiple e.List items at the same time. If you have a multi-e.List item view, it is indicated by (All) in the first row of the table. Because more data is downloaded to your computer in a multi-e.List item view, it can take longer to open than a standard e.List item view. This option may not be available. Contact your administrator for more information.

The Contributor Workbook

To start working on plan data, you open an e.List item by clicking on its name in the table (p. 13). When you open an e.List item, you can view or enter data, depending on your rights and the state of the data.

Each cube of the IBM® Cognos® Planning Contributor model opens on a separate worksheet within an Excel Workbook. You can choose whether to insert the Contributor model into a new or an existing Excel Workbook.

Workbooks can be opened only by users who have installed IBM Cognos Planning Contributor Add-in for Microsoft® Excel. If the workbook is password-protected, users also require the password. You can work with locally saved workbooks (p. 31). If you want to share workbooks with other users, you must have the same version of Microsoft Excel installed.

The workbook has two zones: the Contributor zone and the Excel zone.

Before you can open a Contributor session in Excel, Contributor Add-in for Microsoft Excel must be installed on your computer. For more information, see the IBM Cognos Planning Contributor Add-in for Microsoft Excel *Installation Guide*.

Incompatible Features

IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel does not support the following Microsoft Excel features:

- Track Changes
- Hide All Objects
- Goal Seeking
- Workbook/Worksheet Protection
- Auto filtering
- Hiding and grouping of rows or columns
- Dragging Excel graphs to alter values in cells

To avoid possible problems with a Contributor-enabled worksheet or workbook, do not use these features.

The Contributor Zone

Cells within the Contributor zone behave according to IBM® Cognos® Planning Contributor rules (p. 23). For example, if you type 10K in a cell, the cell remains 10K in an Excel cell but changes to 10,000 in a Contributor cell. If a cell in the Contributor zone expects numbers, you cannot enter

text. If you enter text in a number-formatted Contributor cell, the cell reverts to the last number entered.

Data in the Contributor zone always has column and row headings. Initially, data that you can edit in the Contributor zone has a white background, and read-only data has a gray background. If you use a workbook or template created by someone else, the colors may have already been changed. You can change these colors as you work and can retain the changes in saved workbooks.

You can edit data only if it has a workflow state of Not started or Work in progress. The icon indicates the workflow state. If you are not the current owner, the data opens in a read-only view.

To start editing if you are not the current owner:

- Click **Take Ownership** .

If you want to check whether the cell is a Contributor cell or an Excel cell, click the row and column headings for the cell. A cell is part of the Contributor zone if it meets the following conditions:

- Formulas in the column heading above the cell and in the row heading to the left of the cell begin with "=ContributorCache".
- Headers continue to line up on the same row and the same column as all the other Contributor zone headers.

Important: Do not use the Excel **Edit**, **Delete** command to change the structure of the Contributor zone. If you do, the following happens:

- Whole rows and columns that you delete are restored with your last available data.
- Deleting groups of cells shifts your data into the deleted cells. The shifted data is then used as the last available data for the deleted cells. Cells that were shifted and deleted are restored to their correct position with your last available data.

The Excel Zone

Cells in the Excel zone behave according to Excel rules. You can use the Excel zone to insert graphs (p. 29) to insert calculations that link to or from data in the Contributor zone (p. 20), and to do any other actions that are allowed by Excel. For more information, see the Microsoft® Excel documentation.

You can insert Excel rows or columns between rows and columns in the Contributor zone. These inserted cells are part of the Excel zone. Any worksheets that contain no Contributor data or Contributor cells are also part of the Excel zone.

Reorienting Contributor data to view different dimensions will temporarily hide data in Excel cells on worksheets containing Contributor data (p. 14).

The Contributor Add-in for Microsoft Excel Toolbar

The IBM® Cognos® Planning Add-in for Microsoft® Excel toolbar displays Contributor Add-in for Microsoft Excel formulas when a cell containing a Contributor formula is selected and allows you to perform the following operations:

Icon	Description
	Run the selected Contributor Add-in for Microsoft Excel formula.
	Run all Contributor Add-in for Microsoft Excel formulas in this cube.
	Run all Contributor Add-in for Microsoft Excel formulas.
	Delete selected Contributor Add-in for Microsoft Excel formula.
	Delete all Contributor Add-in for Microsoft Excel formulas in this cube.
	Delete all Contributor Add-in for Microsoft Excel formulas.

Chapter 2: Contributor Add-in for Microsoft Excel

Use IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel to view and edit Contributor data using Microsoft Excel, giving you the benefit of Excel formatting and Contributor linking functionality. Here are some examples of things you can do:

- Add bar charts and other graphs created from Contributor data
- Create dynamic calculations from Contributor data
- Create a calculation in Excel and link it to a Contributor cell

As you update this calculation, you can choose whether to update the value in the Contributor cell.

- Reuse custom calculations and formatting by saving the workbook as a template
- Resize the worksheet so you can see more or less data on a page
- Save data as an Excel workbook and work locally without a connection to the network

View Contributor Data in Excel

You need a Server URL (Web site address) to access the IBM® Cognos® Planning Contributor application. If you do not have one, ask your administrator.

Steps to Work with Live Plan Data

1. In Microsoft® Excel, click the Contributor menu and click **Log On**.
2. In the **Server URL** box, type the address supplied by the administrator, for example:

   http://*server_name*/ibmcognos
3. Click **Log On**.
4. Enter a User ID and Password that is valid for IBM Cognos applications.
5. You may be prompted to select from a list of applications. Click the application you require.

   The workflow screen appears and provides a graphical overview of all the areas you are responsible for, and the status of the data.

   Tips: To show more information about an item, click the blue down arrow. This opens a details panel. You can close the details panel by clicking either of the arrows.

   To send email to people listed in the tree, click the name of the person in the Ownership or Reviewer cells or in the details panel.
6. In the tree on the left side of the screen, click an item, and, in the table that appears, click the name of the item.

   The item appears in an Excel workbook.

Tip: To return to the workflow screen from the Excel interface, click **Contributor**, **Workflow**. To open other parts of the model from the Workflow screen, first save and close workbook you are currently working on.

Steps to Work with Previously Saved Workbooks

1. Open the Microsoft Excel Workbook (.xls) containing the data.
2. If prompted, type the password for the workbook.
3. If you are not logged on to the server and want to save or submit the data, from the **Contributor** menu, click **Log On**.

   Only users with authorized access rights can connect to the Contributor network.

Modifying the View

You can modify the view of IBM® Cognos® Planning Contributor data.

Swap Items in Rows and Columns

When you swap rows and columns, formula ranges on the worksheet are also converted. Orientation-specific Excel functions such as HLOOKUP (horizontal lookup) and VLOOKUP (vertical lookup) may become invalid when views are transposed or reoriented and should not be used on worksheets containing IBM® Cognos® Planning Contributor data.

If you want to swap the rows and columns that currently appear in the view, do the following:

- From the **Contributor** menu, click **Swap Rows and Columns**.

Data and formatting you added transpose according to the rules of the **Paste**, **Transpose** command in Excel. Columns and rows inserted in the Contributor zone also transpose.

Change Rows and Columns

If you want to change the orientation so that different dimensions appear in the rows or columns, do the following:

- Click **Reorient View**, select the items you want to view as rows or as columns, and click **OK**.

Any data or formatting you added rotates out of view when you change the orientation. The formatting and data reappear when you return to the orientation in which they were created.

Change Contributor Page Dimensions

If you want to change the IBM® Cognos® Planning Contributor page dimensions shown on a worksheet, do the following:

- In the lists in the Contributor Page Selection toolbar, click the page dimensions you want to view.

Any data or formatting you added remains because you are still on the same orientation.

Hide a Page, Rows, or Columns Containing Only Zeros

If you want to hide a page, rows or columns containing only zeros on a worksheet, do the following:

- Click **Zero Suppression, Suppress Zeros - Pages, Suppress Zeros - Rows, Suppress Zeros - Columns**.

Hiding a page may cause the application to slow down.

Viewing Multiple Worksheets or Workbooks

You can use IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel to view multiple worksheets or workbooks on the same screen using standard Excel procedures. For example, you can view the Staff Salaries and the Total Expenses worksheets on the same screen. When you make a change to staff salaries, you can see how this change affects your total expenses.

When you view multiple worksheets on the screen, the page dimension lists on the Contributor Page Selection toolbar show the dimensions for the active worksheet.

Manual Update Options to Improve Performance and Allow Unsynchronized Views

Each IBM® Cognos® Planning Contributor cube is on a separate worksheet. When you enter data or change the view of data, IBM Cognos Planning Contributor Add-in for Microsoft® Excel automatically handles these tasks for you.

- It always updates all of the data in the Contributor plan.
- It synchronizes shared page dimensions in all Contributor cubes. For example, if you view two cubes on the screen, the Contributor Add-in for Microsoft Excel automatically synchronizes the page dimensions. If you view Budget 2 in the active cube, the other cube also shows Budget 2. If you switch to Budget 1 in the active cube, the other cube also switches to Budget 1.
- It refreshes its cells portrayed on worksheets not currently visible on the screen.

To improve performance or to allow unsynchronized views, you can change the last two of these setting in workbooks and templates so that they do not occur automatically, but instead rely on you to activate them manually. Performance improves because these automatic events do not occur until you choose to activate them.

Steps to Set Update Options to Manual

1. Click **Update Options**.
2. Select the **Manually synchronize common page dimensions** or **Manually refresh off-screen standard Excel references to Contributor data** option.

   Tip: Clearing these options sets them back to automatic.

Step to Manually Activate both Update Options

- Click the **Refresh** button  .

Consequences of Not Activating these Tasks

There are two consequences of not activating these tasks once they have been set to manual:

- Manually refresh off-screen standard Microsoft® Excel references to IBM® Cognos® Planning Contributor data.

Standard Excel references to Contributor data on off-screen worksheets are not be updated until you select the **Refresh** button on the Contributor **Update Options** toolbar.

Tip: Formulas that directly reference Contributor plan data, that is, those created using the Contributor, Copy Location and Copy Relative Location Commands always continue to be updated automatically.

- Manually synchronize common page dimensions.

  Other Contributor cubes are not synchronized to show the common dimension you are currently using.

  Tip: You might also choose to set the **Manually synchronize common page dimensions** setting so you can view different (unsynchronized) dimensions for different cubes when you view multiple cubes on the screen (p. 15). For example, if you view two cubes on the screen, Contributor Add-in for Microsoft Excel no longer automatically synchronizes the page dimensions. If you view Budget 2 in the active cube, the other cube can continue to show Budget 1.

When you save workbooks or templates locally, any changes you make to default update options are saved within the workbook.

View Data Using Saved Templates

You can open single or multi-e.List items from saved templates. You can then view the data using the formatting and calculations saved in the template. If you open a multi-e.List item view, custom formulas in the template are calculated using the active e.List item.

For more information about templates, see "Save Templates" (p. 32).

Steps

1. In Excel, open the saved template.

   You are prompted to log on to IBM® Cognos® Planning Contributor.

2. Click **Log On**.

3. Enter a User Id and Password.

4. You may be prompted to select from a list of applications. Click the application you require.

5. In the table, open an e.List item.

   The item opens in the saved template.

   For multi-e.List item views only, if you reorient the view so that the e.List page dimension becomes a column or row, custom formulas linked to the e.List in the template are temporarily undefined. The formulas are again populated with data when you restore an orientation with the e.List as a page.

Entering Data

When entering data outside the Contributor zone, we suggest that you insert a new worksheet.

In the Contributor zone, you can type, cut, copy and paste, and delete data. When pasting into multiple cells, the target cells must be compatible with the data you are pasting into them. For example, you cannot paste a number into a cell that expects a date.

Note: You cannot paste formulas into Contributor cells that contain totals or subtotals.

If the target selection is a multiple of the source selection shape, the data is replicated to fit the selection.

You can quickly access commands by right-clicking the required data or cells, and selecting the appropriate command from the menu. You can also use IBM® Cognos® Planning Contributor's cell-based Quick Commands (p. 23).

On worksheets containing Contributor data, lists showing the page dimensions you are viewing appear in the Contributor Page Selection toolbar. For example, the lists may contain different budget versions or profit centers.

Tip: To view a different page, click the down arrow to the right of the page dimension and select a different page dimension from the list.

Validate Data

Data validation is the process of aligning plans with targets by enforcing business rules and policies and ensuring data veracity on an ongoing basis. These rules, which are defined by the administrator in IBM® Cognos® Planning Administrator, represent a single data entry requirement imposed on a range of cells in a single cube of a model. The validation rules are associated with actions that ensure contributors conform to the required input, output, and target requirements, and that only valid data is accepted. 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.

You can check data integrity for your plan any time by using the **Validate Data** command from the **Contributor** menu or the Validate Data button from the toolbar. Because business requirements may change, it is good practice to validate data regularly. If a value is invalid, feedback is provided to assist you with entering information that complies with existing rules.

Steps

1. Enter new data or change existing data as necessary.
2. To verify that the data entries or changes conform to existing business rules and data-format restrictions, from the **Contributor** menu, click **Validate Data** or click the Validate Data button ☑ from the Contributor toolbar.
3. If errors are detected, in the **Validation Error** dialog box, double-click the error to view its location in the worksheet.

   The pointer appears in the first offending cell of the first rule in the rule set.

   Errors that are not resolved may prevent you from saving or submitting the plan. If you are unable to resolve errors based on the error messages, contact your administrator.
4. Make the necessary changes.

Importing and Exporting Data

You can load data, and export data to and from a text file, or if Get Data is enabled by your administrator, you can load data into IBM® Cognos® Planning Contributor from outside sources and copy data within Contributor.

Import from Text File

You can load a text file into the current tab. The file should be identical in format to a file exported from IBM® Cognos® Planning Contributor as a tab separated file.

Step

- Right-click the tab and click **Contributor**, **Load from file**.

Export to Text File

You can save data in the current tab to a tab separated text file.

Step

- Right-click the tab and click **Contributor**, **Save to File**.

Get Data

Get Data, if enabled, lets you load data into IBM® Cognos® Planning Contributor, either from other Contributor cubes, or from external sources. If available, click **Contributor**, **Get Data**. This option is not available when working disconnected from the server.

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 in it are bold. A numerical data cell that has no value contains a zero. If the zero is bold, this is a calculated cell.

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, an 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. 17).

Typically, totals are split according to the original values contained in the cells that make up the calculation.

For example, a cell is the total of Jan through Dec. Typing a total amount into the Total cell and pressing Enter automatically divides the amount over the 12 months. This is called breakback.

If you type 24,000 in the Total cell and press Enter, each month total is 2000.

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

If you change the total to 30,000 and press Enter, each month total changes to 2,500.

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

If you change June to 3000 and press Enter, and then change the total annual cell to 40,000 and press Enter, the June total changes to 3934 and the other months change to 3279. 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
US	3279	3279	3279	3279	3279	3934	3279	3279	3279	3279	3279	3279	**40000**

However, if you change the June total to 3000 without pressing Enter and then change the total annual cell to 40,000 and press Enter, the June total is held at 3000, and the other months change to 3,364.

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

Note: If your administrator set an option to recalculate data as your cursor moves from the cell rather than upon pressing Enter, you need to explicitly hold a value.

Apply or Release a Hold

You can apply a hold to a cell which means that if breakback is used, the held cell is protected from it. A held cell is turquoise in color.

Step to Apply a Hold

- To apply a hold, right-click the cell, and **Hold**.

Step to Release a Hold

- To release a held cell, right-click the cell, and click **Release**.

  Holds are released when you navigate away from the current page.

Apply or Release a Hold

You can apply or release holds on cells. Holds are released when you navigate away from the current page.

If you apply a hold to a cell, you cannot change its background color. The color will revert to the original hold color.

You can change the color of Read-only cells (the default is gray), but you cannot use white, or the color used for a cell that has a hold applied (cyan).

Step to Apply a Hold

- To apply a hold, right-click the cell, and click **Contributor**, **Hold**.

Step to Release a Hold

- To release a held cell, right-click the cell, and click **Contributor**, **Release**.

Cells Formatted as Text

A warning message may appear when you type or select a numerical item in an IBM® Cognos® Planning Contributor cell that is formatted as text.

For example, from a list of months, you may select the total, 2003. The cell is formatted as text to give it the correct cell alignment for any value.

If you choose to ignore this message, an annotations marker appears in the cell.

Remove Error Checking for Numerical Items in a Text Cell

You can remove error checking for numerical items in a text cell.

Steps

1. In the error message box, click **Error Checking Options**.
2. Clear the **Number stored as text** check box, and click **OK**.

Link Contributor Data to the Excel Zone

You can use formulas to link data from your plan within the Contributor zone to cells in the Excel zone. As the Contributor data changes, the data in the linked Excel cells changes either manually or automatically, according to your Excel calculation option. For information about Excel calculation options, see Microsoft Excel documentation.

IBM® Cognos® Planning Contributor keeps your underlying plan data in its calculation engine. At any time, unless your data is only two-dimensional, only a part of your underlying data is shown on the screen in each Excel worksheet. As you reorient your views of cubes presented on Excel worksheets, Contributor changes the data that is currently visible on that worksheet. When you build formulas, you can choose to link them either to the Excel cells of the Contributor zone presenting the latest view of your data or link them to the underlying values in Contributor's calculation engine. Linking to Excel cells uses standard Microsoft® Excel formulas and is desirable when you want your calculations to change as data changes when you reorient your view. Linking to underlying Contributor data uses custom formulas and is desirable when you want your calculations to remain dynamically linked to particular planning data, regardless of whether it is visible on-screen in an Excel cell or not.

When you build formulas, you can either link them to the Excel presentation or link them to the underlying values in Contributor.

When building formulas from Contributor data in the Excel zone, we suggest that you copy the formula to a separate worksheet that does not contain Contributor zone cells.

How you copy data depends on how you want the data to behave in Excel.

Goal	Action
Copied value stays the same in the Excel cell when the Contributor value changes. Example 5,000	Use standard Excel Copy and Paste.
Value changes in the Excel cell as you reorient the view of your Contributor plan data. Example =B2 =+'Income Statement'!B2	Use standard Excel functionality to build a formula.
Value changes in the Excel cell only when the underlying Contributor value changes and not if you reorient the view of your Contributor plan data. Example =CCell("Income Statement", "B2 Profit-center", "Months", "Mar-03", "Versions", "Budget Version 1", "Income Statement", "Interest Expense")	Do the following: 1. Right-click the Contributor cell. 2. Click **Contributor, Copy Location**. 3. Paste copied data into a cell in the Excel zone.
Value changes in the Excel cell as you reorient the e.List item shown in a multi-e.List item view. Note: This option is available only if multi-e.List item views are available for your application. Contact your administrator for more information. Example =CCell("Income Statement", "", "Months", "Mar-03", "Versions", "Budget Version 1", "Income Statement", "Interest Expense")	Do the following: 1. Open the data in a multi-e.List item view. **Tip:** You have a multi-e.List item view if an item named (All) exists in the table on your Workflow screen. 2. Right-click the Contributor cell. 3. Click **Contributor, Copy Relative Location**. 4. Paste copied data into a cell in the Excel zone.

Link Excel Data to the Contributor Zone

You can create formulas within the Contributor zone based on data in the Excel zone and then link data and calculations directly to your Contributor plan. When the data in the Excel zone changes, you can decide whether to update the formula data in the linked IBM® Cognos® Planning Contributor cells (p. 23).

Note: While the value contained in a Contributor Add-in for Microsoft® Excel formula can be saved or submitted to the server, the formula itself can only be saved locally in an Excel Workbook.

Step

- Type the cell reference for the formula total in the Contributor cell.

  For example, to reference a formula in a worksheet named Sheet1, cell B10, type:

  =Sheet1!B10

The formula appears in the panel in the Contributor Add-in for Microsoft Excel Formula toolbar, only for viewing purposes.

Populate Multiple Cells in the Contributor Zone

You can populate multiple cells in the Contributor zone. For example, you might want to copy a relative formula for the sum of cells O29 through O32 in the Excel zone into multiple IBM® Cognos® Planning Contributor cells.

Note: Adding large numbers of formulas increases the time it takes to open a saved workbook.

Steps

1. Type the cell reference for the formula total in the Contributor cell.
2. Click the **Edit Contributor Excel Formula** button. This drops the Contributor formula into the Excel formula bar .
3. Click the cell with the formula that you want to copy and click **Copy**.
4. Highlight the destination cells and click **Edit**, **Paste Special**, **Formulas**.

   When the data changes in the Excel zone, you can choose to update the data in the Contributor cells (p. 23).

   Tip: To delete a Contributor Add-in for Microsoft® Excel Formula, select the Contributor cell and click the **Delete this Contributor Excel formula** button. You can also use the Contributor Excel formula toolbar buttons to delete all Contributor Add-in for Microsoft Excel formulas in a cube or in a model .

Update Data in Cells Containing Contributor Add-in for Microsoft Excel Formulas

When data changes in the Excel cells linked to IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel formulas, you can run the formula links again to update the data in the Contributor cell.

Tip: If data has changed in Excel cells referenced by Contributor Add-in for Microsoft Excel formulas, and you try to save to the server, you will be asked whether you wish to update your Contributor Add-in for Microsoft Excel formulas for the new information before sending your data to the server.

Step to Update the Data for a Single Formula

- Click the Contributor cell and click the **Run this Contributor Excel Formula** button .

Step to Update the Data for All Formulas in a Cube

- Click the **Run All Contributor Excel Formulas in this Cube** button .

Step to Update the Data for All the Formulas in a Model

- Click the **Run All Contributor Excel Formulas** button .

Quick Commands

You can use the following shortcuts in cells. They can be typed directly in cells.

Copy Commands

Copy commands copy a value or operation to the left, right, above, or below rows and columns in a table. Copy commands perform an action on cells of the same type as the one in which they were entered.

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

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 another copy command from advancing beyond the cell

Data Entry Commands

Typing a data entry command in a cell performs an action on the cell value. Data entry commands are processed when Enter is pressed.

These commands are not case sensitive.

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

Command	Description	Action
K	Enters the cell value in thousands.	Example: 5K Enters 5000
M	Enters the value in millions.	Example: 10M Enters 10,000,000
Add, +	Adds a number to the cell value. **Important:** For IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel, entering + does not do this. This indicates the start of a formula and over-writes any existing data in the cell.	
Subtract, Sub	Subtracts a number from the cell value. **Important:** A minus sign (-) is not permitted for sub-tract in the IBM Cognos Planning Contributor cells because this indicates a negative number in Contribu-tor.	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 entered as a percentage. **Important:** For Planning Contributor Add-in for Microsoft Excel, entering % does not have the same effect. This converts the number to a percentage.	Example: per5 Gives 5% of the original cell value
Increase, Inc	Increases the cell value by a number entered as a percentage.	
Decrease	Decreases the cell value by a number entered as a percentage. **Important:** For Contributor Add-in for Microsoft Excel, entering Dec does not have the same effect. This is converted to a date format.	Example: decrease6 Decreases the cell value by 6%
Power, Pow	Takes the cell value to the number entered as a power.	Example: Pow10 Raises the value to the power of 10
Grow Compound, Grow Linear, GroCom, 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 entered.	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 5475 becomes 5500

Command	Description	Action
Hold, Hol	Holds the cell value from breakback calculations.	
Release, Rel	Releases held cells.	

Commentary

User annotations and attached documents that are linked to a plan are grouped together to form commentary. You can copy commentary between IBM® Cognos® Planning Contributor cubes and applications using administration, system, and local links.

Note: You can only copy commentary using links that contain data.

Annotations

You may want to add notes to your plan. You can do this by annotating a cell, tab, or the whole model.

Audit annotations automatically record actions such as typing data, importing files, and copying and pasting data. They are useful if an e.List item has multiple owners and you want to see who made changes.

You can annotate e.List items in any workflow state, including locked. You can annotate a particular cell, tab, or the model once in a session. A session ends when you save it.

Important: After you save or submit a session, you cannot change or delete annotations. Only the administrator can delete annotations.

If you have only View rights to an e.List item, you cannot annotate it.

Steps

1. To add an annotation, right-click the cell, tab, or model, click **Contributor**, **Annotate**, and then select **Cell**, **Tab** or **Model** and then click **Add**. Type your note and then close it.
2. To view annotations, right-click the cell, tab, or model, click **Contributor**, **Annotate**, and then select **Cell**, **Tab** or **Model** and then click **View**. Cell and tab annotations have red indicator triangles in the upper-right corners.
3. If you want to edit an annotation made in the current session, right-click the cell, tab or model, click **Contributor**, **Annotate**, and then select **Cell**, **Tab**, or **Model**, and then click **Edit**.

   Tip: Deleting all the text deletes the annotation.
4. In the Contributor Actions toolbar, click **Save**.

   This also saves any data changes to the server.

   Tip: To view all annotations for a model, right-click the model and click **Contributor**, **Browse Commentary**.

Add Links to Annotations

You can add links to Web pages, files, and email addresses from annotations.

Link to a file only if you expect the file to be viewed by two or three people. If you expect more people, make the file accessible from a Web site.

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 because a fixed drive letter may not be the same for all the people viewing the annotation.

Steps

1. Right-click the cell, tab, or model containing the annotation where you want to add a link.
2. Click **Contributor**, **Annotate**, and then select **Cell**, **Tab**, or **Model** and then click **Edit**.
3. Add a link:
   - To add a link to a Web page, in the annotation edit box, type a valid URL, such as: http://www.ibm.com.
   - To add a link to an email address, in the annotation edit box, type the HTML command as follows:

     mailto:*email_address*

     Clicking this link opens a new mail message window in your default browser, and puts the email address in the To: field.
   - To add a link to a file, type the HTML command as follows:

     file:*unc_drive_name**docs**expenses.xls*

     Tip: To view a link, right-click the cell, tab, or model containing the annotation, click **Contributor**, **Annotate**, and then select **Cell**, **Tab**, or **Model**, and then click **View**. Links in annotations are not activated if viewed by moving your mouse pointer over the red triangle.

Attach Documents

You can attach many types of files to a cell, cube, or model to help support your planning process. The types of files that can be attached are configured by the administrator in IBM® Cognos® Planning Administrator. 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)

You can add or remove any required file type from the defaults provided. Executable files (.exe) are not included in the default list because of security reasons, but can be added by the Administrator.

Attaching a Document

You can attach a document to a cell, tab, or model in the Contributor Web application.

Note: You can also do this in IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel.

Steps

1. In the Contributor workflow screen, click on an available e.List item you want to open.
2. In the Contributor grid, you can either click on the **Attach Document** button or right-click in a cell and select **Attach Document** and then either **cell**, **tab**, or **model** and click **Add**. The Attach a new document dialog box appears.
3. In the Source file location field, enter either the location, the file, or click the browse button and browse to the file location. The document name and file size appear in the following fields.
4. Enter comments into the Comments field. There is a 50 character maximum limit for this field.
5. Click **OK** to attach your document.

A red triangle appears in the corner of the cell to which the document is attached. A copy of the document is attached to the application, not the original file. This is similar to attaching a file to an email and is not meant to perform as a document management system.

Viewing and Editing Commentary

Attached documents and user annotations that are linked to a plan are grouped together and are called Commentary. You can view an attached document by browsing the Commentary of an application. Attached documents do not download when the e.List item is opened. They are only downloaded from the application server when you select to view or edit them.

Note: Attached documents are not available when working offline and you cannot attach a document while working offline. However, it is possible to see if a document is attached to a cell while offline.

Steps

1. In the IBM® Cognos® Planning Contributor grid, click the **Browse Commentary** button or right-click a cell and select **Browse Commentary**. An icon also appears in the Contributor workflow screen notifying you that one or more documents are attached to an e.List item. However, you cannot open attached documents from the workflow screen.
2. In the Commentary Browser dialog box, select the commentary item that you want to view and click **View Document** to open the file. You can filter the items to just show user annotations

or attached documents. You can also choose whether to view Commentary for the current page in the grid or Commentary for all pages.

3. To edit commentary, select the commentary item and click **Edit Document**. The item opens allowing you to make changes and save the new version along with the application. You will be prompted to update the repository if you made changes to the file.

4. To delete commentary, select the check box for the item you want to delete and click **Delete**.

   Note: Only the owner or the Contributor administrator can delete an attached document.

5. You can print an annotation by selecting the file and clicking **Print**. To print a document, open it and print from the associated viewer.

Using Local Links to Move Commentary

Create a Local Link to copy commentary such as file attachments or user annotations. 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.

Note: You cannot target calculated cells using a Local Link.

Steps

1. In the Contributor grid, launch Get Data.

2. In the **Run Local Links** dialog, click **New** to create a new Local Link. Complete the information in the wizard.

3. In the **Additional Options** screen of the **Get Data** dialog box, you can choose to include annotations or attached documents. Do one of the following:

   Note: You cannot select Model Commentary for a Local Link.

   - To include only annotations, click **Include Annotations**.
   - To include attached documents with comments, click **Include Attached Documents**.

4. Click **Finish** when you are done configuring the link.

Adding Charts and Graphs

You can insert graphics, such as charts and graphs, in the Excel zone as you would in any Excel workbook. For more information, see the Microsoft® Excel documentation. The graphic can float over both the Excel and Contributor zones.

You can choose whether to make the graphic relative or absolute.

If you want the graphic to change as the view orientation changes, insert the graphic as you would in any Excel workbook.

If you want the graphic to remain the same even when the orientation changes, use cells that were copied from the Contributor zone using Copy Location as the data range for the graphic. For more information, see "Link Contributor Data to the Excel Zone" (p. 20).

Save Data

After you enter data, you can save the data on the server and recalculate e.List items. You can edit this data at a later date.

At any time you can also save the data locally in an Excel Workbook. You can then open the data when you are not connected to the network.

IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel does not support tracking changes in Excel. To avoid possible problems with a Contributor-enabled worksheet or workbook, do not use this feature.

Contributor Add-in for Microsoft Excel does not support protection in worksheets or in workbooks. To avoid possible problems with a Contributor-enables worksheet or workbook, do not use this feature.

If you entered 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 save the plan. You must correct the data before you can save it to the server.

Steps to Save Data on the Server

1. In the Contributor Actions toolbar, click the **Save** button.

   If errors are identified during the validation process, they are summarized in the **Validation Error** dialog box, which shows the location of any of the failed rules.

2. If the **Validation Error** dialog box appears, double-click the item in the dialog box.

   The pointer moves to the first offending cell in the worksheet.

3. Make the necessary changes.

4. To verify that the data entries or changes conform to existing business rules and data-format restrictions, from the **Contributor** menu, click **Validate Data**.

5. Repeat step 2 to 4 until no errors are detected.

6. Save your data again.

You can continue to work on the data, or you can close the Excel Workbook. After the data is saved on the server, you are given the option to save the Excel Workbook to a file.

Step to Save Data Locally

- In Excel, from the **File** menu, click **Save**.

  When you save a workbook locally, we suggest that you also save the data on the server.

Work with Locally Saved Workbooks

You can work with one or more locally saved IBM® Cognos® Planning Contributor workbooks without being connected to the Contributor server. When you have completed your plan, you need to rejoin your centralized planning process by saving a version back to the server. When you log on to the server, Contributor downloads any late-breaking changes in your planning model and downloads the latest values from the server into your open workbook.

You have not lost your data, however. IBM Cognos Planning Contributor Add-in for Microsoft® Excel automatically preserves a separate copy of the data in your active session. As long as your Contributor Add-in for Microsoft Excel session is open, you are free to reload your active data from some or all of the cubes back into your workbook. This overlays the values sent from the server, as long as the cells have not been locked by your administrator.

For example, you can do this if you must reduce the amount of money allocated for expenses. You can compare different scenarios, each held in their own workbook, before loading data back to the server.

Loading saved data to the server also lets you replace the latest data in the IBM Cognos Planning Contributor server with saved data. For example, if a change was made to projected sales data on the server and you want to replace the data with previous values, you can open a locally saved workbook and load the saved data back to the server.

You can load data only to cells on the server for which you have the right to edit. Data is not loaded into cells that were locked by an administrator. If cells were removed from the Contributor server since your workbook was saved, the data in these cells in the saved workbook is not loaded to the server.

Important: If substantial changes were made to the content or structure of the data on the server since you saved your workbook, it may not be practical to load the saved data to the server.

Steps

1. If you are logged on to the server, from the **Contributor** menu, click **Log Off**.
2. Open the saved workbook.
3. Make any changes you want to the data in the workbook.
4. From the **Contributor** menu, click **Log On**.
5. Click **Yes,** and then click **Log On**.
6. Enter a User id and Password.
7. You may be prompted to select from a list of applications. Click the application you require.
8. In the table, open an e.List item.

   Your worksheet now appears with the latest data from the Contributor server.
9. From the **Contributor** menu, click **Reassert Data**.
10. Select the cubes containing the data that you want to load to the server from the workbook.

11. Select whether you want to include annotations with the cubes you selected to load from the workbook.
12. Click **OK**.

Save Templates

You can save calculations and any custom formatting locally as a template.

You can then send this template to other users or save it on a common server. When other users open the template in Excel and log on to IBM® Cognos® Planning Contributor, the template is populated with data from the e.List items they open. For information about using saved templates, see "View Data Using Saved Templates" (p. 16).

You can save only single e.List item views as templates. When you save e.List items as templates, all multidimensional Contributor formulas are saved relative to the e.List. For information about Contributor to Excel links, see "Link Contributor Data to the Excel Zone" (p. 20).

Step

- From the **Contributor** menu, click **Save As Template**.

Reset Data

You can reset all data in the Contributor zone to the saved version.

Important: This also resets annotations, which means you lose any added since the last save.

Step

- From the **Contributor** menu, click **Reset All**, and click **Yes**.

  Tip: To reset selected data only, use the Reset Quick Command (p. 23).

Print Data

You can use the IBM® Cognos® Planning Contributor print functionality to print the current view of Contributor data. You can also use the standard Excel print function.

Step to Print the Current Two-dimensional View of Your Worksheet

- In the Excel **File** menu, select one of the Print options.

Step to Print Only the Contributor Data Without Any Excel Data or Formatting

- From the **Contributor** menu, click **Multi-Dimensional Print**.

Submit Data for Review

You submit an e.List item to the next reviewer in the planning model hierarchy when you are satisfied with the data it contains.

If you entered 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.

Note that after you submit the e.List item, the item is locked and you can make no further changes.

To submit data, you must have submit rights, and all the e.List items in the item must have been submitted.

Steps

1. In the Contributor Actions toolbar, click the **Submit** button .

   If errors are identified during the validation process, they are summarized in the **Validation Error** dialog box, which shows the location of any of the failed rules.

2. If the **Validation Error** dialog box appears, double-click the item in the dialog box.

   The pointer is moved to the first offending cell in the worksheet.

3. Make the necessary changes.

4. To verify that the data entries or changes conform to existing business rules and data-format restrictions, from the **Contributor** menu, click **Validate Data**.

If no error messages appear, totals are calculated and the data is submitted to the reviewer. The reviewer can either accept or reject the changes you made to the e.List item.

Review Data

e.List items that you are responsible for reviewing are grouped under **Reviews**.

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 . It must be modified and resubmitted.

You may be prompted to send an email to the owners of the contribution explaining the changes that must be made 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 from the grid .

Chapter 3: Get Data

You can run two different types of links using the Get Data tool: Local and System Links.

Local Links

Local Links are created directly in Get Data. They load data into IBM® Cognos® Planning Contributor from various sources, including other Contributor tabs.

System Links

Systems Links are created by the IBM® Cognos® Planning Contributor administrator and are deployed to users in designated users, groups, or roles. System Links are defined in IBM Cognos Planning Administrator and cannot be edited or shared by web users. System Links can use source data from other Contributor applications in the same Planning Store.

Link States

The **Run Local Links** dialog box lists all links (Local or System) that are available with your open the IBM® Cognos® Planning Contributor grid and the status of those links.

Links can exist in two states: Ready or Incomplete .

The Ready icon appears when the link definition is correctly defined. All source dimensions are mapped to a target dimension or at least one item from each unmapped source and target dimension is selected. You can run a link only if it is in a ready state.

The Incomplete 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

Local Links

A Local Link is a mapping between a set of data that you want to either import into your e.List item(s) in the IBM® Cognos® Planning Contributor Grid or move to a different location in the open e.List item in the Contributor Grid. A Local Link is made up of the source data, items in the source, commentary, and the target tab of the source data.

Link definitions can be created using external data sources or tabs in the active Contributor Grid. Link Definitions can be modified and distributed after creation. Link definitions can be stored as a *.cld file.

In Get Data, you can create (p. 36) and run (p. 35) a Local Link.

Create a Local Link

Create a Local Link so that you can load data from the following types of sources:

- **ASCII files**

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

- **Microsoft® 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 Contributor Export for Excel.

  Important: When using a Microsoft Excel file as the source, in order for breakback to work, you must first delete the appropriate rows in file before importing.

  With the breakback functionality, detailed cell entry takes precedence over the breakback. When importing an Excel file, cells that are blank are treated as zeros. Therefore, after performing the import with cells that are blank, the detailed cell entries will be imported with zeros. This will cause expected breakback results to not appear within the grid.

  In order for the breakback to properly occur, the rows to be included in the breakback must be removed from the source file. After this is done and the link is executed, breakback will occur and the expected results will appear on the IBM® Cognos® Planning Contributor grid.

- **Local Contributor Data**

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

Steps

1. Open Get Data.
2. In the **Run Local Links** dialog box, click the **New** button.

   The **Define Source Type and Destination** dialog box appears.
3. In the **Link Name** box, enter a name for the new load.

   Link names must be unique and cannot contain these characters: '\ /:*?"<>|.
4. In the **Description** box, enter a brief description of the source and target of the link.

   Tip: This information is useful when sharing links with other users.
5. In the **Data source type** box, click the data source type you want.
6. In the **Pick source tab** list, if you are using Contributor data, click a source tab where you want the data loaded from.

7. In the **Pick target tab** list, if you are using Microsoft Excel or ASCII data as the source, click a target tab where you want the data loaded into and click **Next**.

   The **Pick Source Data** dialog box appears.

8. In the **Source** box, enter the file name.

9. Provide the information required for your source file type:

   - For an ASCII file with fixed width columns, click **Fixed width columns**.
   - For an ASCII delimited file, specify the delimiter and the text qualifier that the file uses.
   - For a Microsoft Excel spreadsheet, choose a worksheet if required.
   - For a Contributor tab, specify the source and target tab.

10. Click **Next** to continue.

    The **Map Source to Target** dialog box appears.

11. In the top work area, select each row or column that you want to identify as description data and click **Description**. The Description icon appears  .

    Description columns cannot follow Data columns in the source file.

12. Select each row or column that contains data for loading and click **Values**.

13. If some data is not numeric, right-click each column or row that contains non-numeric data, click **Data Format**, and click **Text**, **Number**, or **Date**.

14. If some rows or columns of source data are not needed, select each of these rows or columns and click **Ignore**.

    The Ignore icon  appears in the header.

15. In the **Start import at row** box, enter the row number that you want to start your import with if you do not want to load data beginning with the first row.

16. If you want, rename the rows and columns (p. 38).

17. If you want, split a column or merge dimensions (p. 38).

    You must now map the dimensions.

The Map Source to Target Dialog Box

The **Map Source to Target** dialog box is divided into two work areas:

The upper area is where you identify your source dimensions as data, description information, or unnecessary rows and columns. You can also rename columns and rows to make the link definition easier to understand. This is where you merge or split columns depending on what your target dimension requires.

The lower area is where you map source dimensions to target dimensions. You can map one or more source dimensions to a target dimension manually or you can choose **Map All** to map dimensions with the same name. You can also edit and clear any mapped dimensions.

Rename Rows or Columns

When you preview your source files in Get Data, the headers are automatically renamed. For example, columns are renamed to C1, C2, and rows are renamed to R1, and R2.

You can rename your columns and rows by manually renaming the rows and columns or renaming columns using existing column headers.

Tip: Renaming rows and columns the same name as target dimensions helps to easily identify which source and target dimensions match. You can then use the Map All feature.

Steps to Manually Rename Row and Columns

1. In the **Map Source to Target** dialog box, select a row or column header and click **Rename**.
2. Enter a new heading.
3. Click **OK**.

Step to Rename Columns Using the Row Header

- In the Map Source to Target dialog box, in the **Rename columns using row** box, enter the number of the row that contains the original names you want to use for each Description column.

  This does not change dynamically with the data.

Split 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.

Steps

1. In the **Map Source to Target** dialog box, select the source dimension (row or column) that you want to split and click **Split**.
2. Position your pointer where you want to split the data, left-click, and drag the line into position.
3. Right-click the character to remove the split bar.
4. Click **OK**.

Merge 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 year (Jan 03).

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

You can also undo a split by merging the new dimensions.

Steps

1. Select the columns or rows that you want to merge.
2. Click **Merge**.

Map Dimensions

You must map the source dimensions to the target dimensions for loading.

You can either map source and target dimensions with the same names automatically, or manually map source dimensions to target dimensions.

Tip: You can tell what type of mapping was used by pausing the pointer over the connecting line between the source and target dimensions.

You can quickly map your source and target dimensions when the names of each already match. This feature is useful when working with large files that contain many rows and columns.

The **Map All** button is available only if you have at least one set of matching dimensions.

If the items in the source and target dimensions do not match, a manual map is required. For example, if the source item is Jan-03 and the target items is 1-03, a manual map is required. If the items in a source or target of the manually mapped load are added, the load must be manually updated.

Steps for Automatic Mapping

1. If the names do not already match, in the **Map Source to Target** dialog box, rename the columns and rows to the same names as their corresponding target dimensions.
2. Click **Map All**.

   A single line connects paired dimensions.

   Tips: Double-click the connecting line (or either dimension) to confirm that the items in the dimensions are mapped correctly.

   To change the link properties, click the line and click **Edit**. To remove the link, click the line and click **Clear**. To remove all links, click **Clear All**.

Steps for Manually Mapping

1. In the **Map Items** dialog box, select a source dimension and a target dimension and then click **Map**.

   The **Map Items** dialog box appears. Any matching dimension items are highlighted.

   Tip: Select the **Case sensitive** check box if you want to map items based on capitalization and the **Calculated items** check box if you want to map the calculated items.

2. Click **OK** to accept the highlighted dimension items.

   The **Map Source to Target** dialog box reappears.

3. If unmatched items remain in the **Map Items** dialog box, click **Manually Map** and do the following:
   - In the **Source Items** box, select a source item.
   - In the **Target Items** box, select a target item.
   - Click **Add**.
   - Click **OK**.

   The **Map Source to Target** dialog box reappears. A line connects single/paired dimensions.
4. Click **Next**. The **Additional Options** dialog box appears.

   To include annotations, select **Include annotations**.

   To include attached documents, select **Include attached documents (with comments)**.
5. Click **Finish** when you are done configuring the link element.
6. The **Run Local Links** dialog box reappears listing the new Local Link and whether it is Ready or Incomplete.

View Items in a Dimension

You can view only the first 50 detail items in a dimension.

Steps

1. Select either a source or target dimension.
2. Under the dimension name, click the **Preview** button  .

Remove Dimensions

You can remove a selected dimension from the **Source Dimensions** list in the **Map Source to Target** dialog box.

Steps

1. In the **Map Source to Target** dialog box, select the source dimension you want to remove.
2. Click the **Remove** button  .

   This removes the description designation from a row or column. The row or column is now treated as values.

Filtering Dimension Items by Characters

You can filter dimension items that appear in the Dimension Items list based on the first character or 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. You can use substrings when mapping dimensions manually or automatically.

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

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. Sometimes, the source and target do not have the same number of dimensions or some source dimensions are not meant to be mapped directly to a target dimension. All dimensions must either be mapped or dealt with before you can run a load.

The load appears in the **Local Links** list with either a ready or incomplete symbol.

Resolve Unmapped Source Dimensions

Unmapped source dimensions are dimensions that are not mapped to a target dimension. You must designate the items on each unmapped source dimension that are to be included in the load. At least one item from every unmapped dimension must be selected or no data from the source will be loaded and the link will be incomplete.

Note: All source dimensions must be addressed, either by being mapped to a target dimension or by having items selected for inclusion on the **Unmapped Dimensions** dialog box. Otherwise the load will not be marked as complete and cannot be executed.

Steps

1. In the **Pick Unmapped Source Dimensions Items** dialog box, in the **Available** list, select which dimension items should be loaded.

   If you select more than one item, the aggregated total is loaded into the target.

2. Select the **All items** check box if you want to include all items and any items added in the future to the source dimension.

3. Click **Next**.

4. Repeat for any unmapped source dimension items.

Resolve Unmapped Target Dimensions

Unmapped target dimensions are target dimensions without any source dimensions mapped to it.

All target dimensions must be addressed, either by being mapped with a source dimension or by having items selected for inclusion. Otherwise the load will not be marked complete and can not be run.

Steps

1. In the **Pick Unmapped Target Dimensions Items** dialog box, in the **Available** list, select which dimension items should be targeted by the source data.

   The same value is loaded into all items selected.

2. Select the **All detail items** check box if you want to include all the current items and any future items added to the target dimension.

3. Click **Finish**.

Add an Existing Link Definition

You can add link definitions to the **Local Links** list that were created by other IBM® Cognos® Planning Contributor users.

Steps

1. Click **Add**.

2. Find the link definition file (*.cld).

3. Click **Open**.

   The newly added link definition appears in the **Local Links** list. You can now edit or run this link definition.

Share a Link Definition

You can share link definitions with other IBM® Cognos® Planning Contributor users by distributing link definitions through email or network locations.

Users must have submit or edit access to the target cube that is defined in the link definition to run the link. You define access privileges in IBM Cognos Planning Administrator.

Steps

1. In the **Local Links** list, select the link definition that you want to share.
2. Click **Save as** to save the link definition to your local computer, or to a network location.
3. Make the link definition file (*.cld) and the source file (*.xls or *.txt) available to other users.

   Users can now add the link definition file to the **Local Links** list (p. 42). If they want to change the current location of the source file or use a different source, they must modify the link definition.

Run a Local Link

To load data into a target IBM® Cognos® Planning Contributor 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.

   Multiple loads run consecutively.

   Tip: You can control the order that the Local Links run in by adding them to the **Local Links** list in the desired order.
2. Click **Run**.
3. Click **OK** when the link is finished running.

Quick Load

You can load data from an Export for Excel file by using the Quick Load feature.

Steps

1. In the **Local Links** dialog box, click the **Quick Load** button.
2. Under **Export for Excel file**, in the **Source** box, enter the file name.
3. Choose the worksheets you want to load.

   Tip: You can also click the **Select All** button or the **Deselect All** button.

4. Preview the file in the preview window.
5. Click **Run**.

Run a System Link

You can run only System Links if the IBM® Cognos® Planning Contributor administrator grants you access to them. You cannot create a System Link.

Tip: To view the System Link execution history which includes when a link was run and by whom, click the **History** button.

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: Export Contributor Data to Microsoft Excel

You can export IBM® Cognos® Planning Contributor data to Microsoft® Excel if this feature is enabled by your administrator. You can export data to Microsoft Excel to create reports, charts, and manipulate the data using the functionality of Microsoft Excel.

Steps

1. From the **Tools** menu, click **Export for Excel**.

   Note: The name of the menu item is configurable by your administrator.

2. Choose one of these options:
   - **Current view only**: this exports the active page in the selected tab to Microsoft Excel.
   - **Refresh existing report**: this refreshes an existing report with updated Contributor data.
   - **Define a new report**: this creates a new report.

3. If you selected **Refresh existing reports**, configure the options as follows:
   - To add new reports click **Add** and then browse to the report location. You can also remove reports.
   - **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.

4. If you selected **Define a new report,** configure the options as follows:
   - Choose what type of Selection (p. 46) you want to use with your export. You can include commentary with your selections.
   - Select which Tabs you want to include in this report. You can choose all of the tabs.
   - Select the data from each Tab that you want to export.
   - **Use Selection** reuses an existing saved selection.

- Choose an orientation for the selection. Note that multiple dimension selections will be laminated. If you have duplicate header cells, select the **Merge Duplicate Header Cells** check box to merge them.

Selections

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

Once selections are created and saved, they are called saved selections and are stored in a specific location determined by your Contributor Administrator.

For more information about configuring Export for Excel, see the Contributor *Administration Guide*.

Choose which selection option you want to use:

- New Selection - creates a new selection of data. You can choose to include commentary.

  Optionally, to reuse this selection later, type a name for the new selection in the field. This name should represent what the data selection is (such as *2001 Revenue, Eastern Region Expenses*).

- Edit Selection - changes the structure of an existing selection.

- Use 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.

- Include Commentary - to include any commentary with your selection. You cannot select Include Commentary for a previously saved selection if the commentary was not included as part of the original selection creation. Choose Edit Selection if you want to include commentary with this selection.

Chapter 5: Best Practice

This section is intended to help you work most effectively with the IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel in the following areas:

- Working with saved drafts in Microsoft Excel workbooks (p. 47).
- Templates, formatting and formulas (p. 49).
- Visual Basic and Macros (p. 50).
- Secure Web site access (p. 50)

Working with Saved Drafts in Microsoft Excel Workbooks

IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel allows decentralized users to participate in a centralized planning process by communicating their proposals to the Contributor server. Administrators can change models and bring in new data to models. Contributor Add-in for Microsoft Excel allows you to use Excel workbooks to add data and Excel customization (formatting plus incoming and outgoing formulas) to your draft planning scenarios. By saving drafts in such Excel workbooks, you can work disconnected from the server and can retain the data and Excel customization for one or more draft scenarios.

Locations of Models, Data, and Microsoft Excel Customization

Location	Centralized Server Version	Contributor Add-in for Microsoft Excel Active Session	Drafts in Saved Excel file(s)
Planning Model	+	+	+
Data	+	+	+
Excel customization (formatting plus incoming and outgoing formulas)	-	+	+

Opening a Saved Excel Workbook and Disconnected Mode

Opening a saved Microsoft® Excel workbook containing an IBM® Cognos® Planning Contributor planning model allows you to see and to edit the planning model, the data, and the Excel customization saved within that workbook.

The model and data are not updated with the latest model and data until you log on to the associated Contributor Web site and rejoin the centralized planning process.

Open saved Excel workbooks in disconnected mode when you need to work offline while away from the office. You must log on to the system to update data.

Logging on to the Contributor Web Site and Connected Mode

Logging on to the IBM® Cognos® Planning Contributor Web site allows you to participate in the centralized planning process. When you log on to the server, Contributor downloads the latest changes and values in the planning model from the server into your open workbook.

You have not lost your data, however. The Contributor Add-in for Microsoft® Excel automatically preserves a separate copy of the data in your active session. As long as your Contributor Add-in for Microsoft Excel session is open, you can reload the active data from some or all of the cubes back into your workbook. This overlays the values sent from the server, as long as the cells have not been locked by your administrator. You can activate this by clicking **Reassert Data** on the Contributor menu (p. 31).

You can get data in the following ways:

- You can get the latest data on the server, by logging on
- Latest data in your active session, by working disconnected or by logging on and then using the Reassert Data command.
- Last saved data in an Excel file, by closing your active workbook without saving it and then re-opening it or another workbook and working in disconnected mode.

Whether you receive any Excel customization depends on whether you log on from within a saved workbook containing a Contributor planning model with Excel customization. The choices are:

- No Excel customization
- Use Excel customization

No Excel Customization

Logging on to an IBM® Cognos® Planning Contributor Web site from an Excel workbook that does not contain a Contributor planning model causes the latest planning model and latest data from the centralized server version to be inserted into new worksheets.

This insertion of the Contributor planning model can occur on an existing or a blank workbook.

You can then add data and customize the worksheet.

Use Excel Customization

Logging on to an IBM® Cognos® Planning Contributor Web site from an Excel workbook that already contains a Contributor planning model causes the latest planning model and latest data from the centralized server version to be merged with the Excel customization within your Excel workbook.

You can then reassert your data from your active session, add and edit data, as well as to add and alter Excel customization.

Templates, Formatting and Formulas

We recommend the following when using templates, formatting, and formulas.

Use Separate Worksheets for Personal Planning Data Linked into Contributor Cells

Worksheets containing IBM® Cognos® Planning Contributor cubes can undergo many changes as you re-orient the view. Non-Contributor data and Excel formatting on such a worksheet will move with each orientation of the Contributor cube.

If you place personal planning data in non-Contributor cells on such a worksheet, your data rotates in and out of view as the orientation changes. In addition, your data transposes when the view transposes.

The best practice is to place personal data on separate worksheets, where it is always visible and is not subject to the changes that might affect the worksheet containing the "rotating" Contributor cube.

Keeping Excel-based Templates Flexible With a Contributor Planning Model

Keep up with changing D-List item names by using IBM® Cognos® Planning Contributor custom formulas. Do not type in the names of D-List items into cells. Instead, copy them from Contributor title cells and paste them into your Excel destination cells.

IBM Cognos Planning Contributor Add-in for Microsoft® Excel builds formulas linked to the planning D-List items (=ContributorCache) and the target cells automatically change if the name of the item changes in the centralized planning model.

Keep up with changing planning values by using Contributor custom formulas. Use the Copy Location command from Contributor cells and paste them into your Excel destination cells. Contributor Add-in for Microsoft Excel builds formulas linked to the multi-dimensional planning value (=CCell) and the target cells will automatically change if the value ever changes in the centralized planning model.

Custom Formatting Contributor Cells

You can use custom formatting in IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel for individual cells.

Consider the following items when using custom formatting in Contributor Add-in for Microsoft Excel.

- Do not use the standard Contributor font and fill colors set in IBM® Cognos® Planning Administrator. See the Contributor *Administration Guide* for more information.
- Do not apply formatting to a cell while you are holding it. When the hold is lifted, cell formatting will not revert to the color is was before the hold was applied.

Visual Basic and Macros

Excel permits users to extend its behavior with VBA macros, automation controllers and add-ins. But attempting to extend Excel when using IBM® Cognos® Planning Contributor Add-in for Microsoft® Excel is strictly at your own risk since doing so might produce unexpected results. It is not guaranteed that any non-IBM Cognos extension will operate as planned when Contributor Add-in for Microsoft Excel is installed.

However, simple one-time action macros, like button macros to navigate a worksheet are likely to work. Furthermore, note that Contributor Add-in for Microsoft Excel is for the most part inactive when you work in a workbook that does not contain an IBM Cognos Planning Contributor planning model. Therefore, a non-IBM Cognos extension is more likely to operate as planned when you work in a non-Planning workbook than when you work in a Planning workbook.

Contributor Add-in for Microsoft Excel is compatible with other IBM Cognos add-ins such as Contributor Export for Excel.

Although Contributor Add-in for Microsoft Excel is installed within your copy of Excel, it only activates when you either log on to a Contributor Web site or load a saved Excel workbook containing a Contributor planning model.

Secure Website Access

If a company implements a Website authentication tool such as eTrust SiteMinder, administrators will need to append the IBM® Cognos® Planning Contributor application URL with "?=smforms "when using IBM Cognos Planning Contributor Add-in for Microsoft® Excel. This is because the secure website authentication tool may use a pop-up dialog or redirect users to a logon webpage.

Specifying "?=smforms" at the end of the URL turns off the automatic website monitoring logic built into Contributor Add-in for Microsoft Excel that would detect whether or not a user has browsed to a valid Contributor Website.

Administrators should try to browse to the Contributor Website without appending their URL with "?=smforms" first because many other secure Website providers have many different authentication modes and some are seamless while others pop up dialog boxes or redirect to a logon webpage.

Important: By appending the URL with "?=smforms", you are disabling the validation logic and thereby allowing users to browse to other Web sites.

Chapter 6: Troubleshooting

This chapter identifies issues that may require troubleshooting and suggests causes and actions to take.

An Extension Does Not Download

The first time you activate an extension a message appears stating that a one-time download to your computer is required. If you accept this download and nothing happens, the extension CAB file containing the needed files may not be properly configured in IBM® Cognos® Planning Administrator. This causes the download to stop.

Confirm that the CAB files are copied to the Controls folder of the IBM® Cognos® Planning Contributor Web site at *install_location*\c10\webcontent\contributor\CONTROLS.

This does not apply if your company uses an automated software delivery system, such as Microsoft® SMS, to deploy client software or if your network administrator designated a different method of installing Extensions besides through the Contributor grid.

Get Data Troubleshooting

You may encounter problems when using Get Data. We provided information to help you do troubleshooting.

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, you can map the source dimension item to another target dimension item or remove the manual map entry. Verify your access to those 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 it 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 an extra source dimension existed in the load. Perhaps one Dimension item from the source is included 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 includes 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, most likely the user has not taken ownership yet.

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

Export for Excel Troubleshooting

This section reviews formatting issues that occur in Export for Excel.

Structural Differences

Structural differences are discrepancies between the existing Microsoft® Excel report and the current model data within IBM® Cognos® Planning 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 or not 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**, aborts the refresh operation.

Laminations

Laminations are two or more dimensions merged into one axis (row or column). You can use laminations to reduce the number of pages in your report by moving page dimensions to either rows or columns.

Merge Duplicate Header Cells

When the header cells of laminated dimensions are merged, the repeated sequential header names are shown in merged cells rather than repeated in each unmerged cell. See example below.

Merged		Not Merged	
Y		A	Y
B	X	B	X
Y			

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.

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, TM1, and Express, 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.

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.

Planning Administrator

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.

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.

reviewer

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

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