Cognos® 8 Planning

CONTRIBUTOR

USER GUIDE

COGNOS®

THE NEXT LEVEL OF PERFORMANCE™

Product Information

This document applies to Cognos® 8 Planning Version 8.3 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

Copyright

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Introduction

This document is intended for use with the Cognos 8 Planning - Contributor Web Client. This guide describes how you can use Cognos 8 Planning - Contributor to see the current state of your plan, and explains how to enter and review data.

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

Cognos 8 Planning - Analyst

Analyst is a flexible tool used by financial specialists to define their business models. These models include the drivers and content required for planning, budgeting, and forecasting. The models can then be distributed to managers using the Web-based architecture of Cognos 8 Planning - Contributor.

Cognos 8 Planning - Contributor

Contributor streamlines data collection and workflow management. It eliminates the problems of errors, version control, and timeliness that are characteristic of a planning system solely based on spreadsheets. Users have the option to submit information simultaneously through a simple Web or *Microsoft Excel*® interface. Using an intranet or secure Internet connection, users review only what they need to review and enter data where they are authorized.

For more information about using this product, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

Best Practices for Cognos 8 Planning

The Cognos Innovation Center™ for Performance Management provides a forum and Performance Blueprints which 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 Cognos customers and the Cognos Innovation Center. These Blueprints are free of charge to existing customers or Platinum and Gold partners. For more information about the Cognos Innovation Center or the Performance Blueprints, visit http://www.cognos.com/innovationcenter.

Audience

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

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: For online users of this document, a Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon credentials are available either from your administrator or by request from support.america@cognos.com.

Document	Description
Contributor *for Microsoft Excel*® User Guide	Using the Cognos 8 Planning - Contributor *for Microsoft Excel*®
Contributor Work Offline Guide	Working offline in Contributor

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

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

Getting Help

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Chapter 1: Use Cognos 8 Planning - Contributor

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.

You can make current Contributor data available in Cognos 8 Framework Manager for reporting purposes. You can also use Excel print formatting and preview features, and export current data to Excel for customized reporting. If you want to use these features and they are not available, ask your Contributor administrator.

Steps

1. Open a Web browser. Type the Web address supplied by your administrator in the address bar, typically http://*servername*/cognos8.
2. Type your user ID and password and click **OK**.
3. In the Plan and forecast area, click the **Contributor** link. If you have access to more than one plan, click the plan that you require.

   When you log on to Contributor, you see a graphical overview of all the areas you are responsible for, and the status of the data.
4. To start using Contributor, in the tree on the left side of the screen, click an item. In the table that appears, click the name of the item.
5. To show more information about an item, click the blue down arrow. This opens a details panel that you can close by clicking either of the arrows.
6. To send email, click the name of the person in the Ownership or Reviewer cells or in the details panel.
7. To start working, click the e.List item in the table. This opens an e.List item in a grid where you can view and enter data.

The Workflow Screen

The Workflow screen appears when you log on to 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.
	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.

Icon	State and description
	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 .

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

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

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.

Chapter 2: View and Enter Data

When you open a contribution, you can begin to view or enter data depending on your rights and the state of the data.

Enter Data

Data that you can edit has a white background. Read-only data has a pale gray background.

You can also use Contributor's cell-based Quick Commands (p. 19).

If you are not the current owner, the data opens in a read-only view.

You can edit data only if it has a workflow state of Not started or Work in progress. The icon indicates the workflow state.

Note: Entering large amounts of text can expand the column width so that the Contributor grid is difficult to use. You may not be able to see the full text within the grid. This is because text formatted cells do not wrap text. Keep text in cells short to avoid this problem.

Tip: To quickly access commands, right-click the required data or cells, and select the appropriate command from the menu.

Step to Start Editing

- Click **Take Ownership**.

Validate Data

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

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

You can check data entry for your plan at any time by using the **Validate Data** command from the **File** menu or the Validate Data button from the toolbar. Because business requirements may change, it is good practice to validate your data regularly. The benefit of validating data on the Web client is that it allows the you to validate input data before transmitting it to the Contributor Web server. If a value is invalid, feedback is provided to assist you with entering information that complies with existing rules.

The data validation functionality is also available from the Cognos 8 Contributor for *Excel* and while working offline.

Steps

1. Click the dimension tab that contains the target cell range for validation.
2. Enter new data or change existing data as necessary.
3. To verify that the data entries or changes conform to existing business rules and data-format restrictions, from the **File** menu, click **Validate Data** or click the Validate Data toolbar button ✅.
4. If errors are detected, in the **Validation Error** dialog box, double-click the error to view its location in the grid.

   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.

   The pointer appears in the first offending cell on the first failed rule in the rule set.
5. Make the necessary changes.

Print Data

You can print data either using the Print to *Excel* extension, if enabled by your administrator, or using the standard Contributor Print.

Using the Print to *Excel* extension, you can print the current view of Contributor data using the *Excel* print formatting and preview features. You can also choose to print only certain e.List items and include commentary.

Steps Using Print to Excel

1. From the File menu, select **Print**. The Print to *Excel* wizard appears. If this is the first time using this extension, a one-time download from the server will occur.

   Note: As two-dimension cubes only have one page to print, Print to *Excel* forgoes the normal selection wizard and proceeds directly to the *Excel* Page Setup screen.
2. The first screen of the wizard displays the tabs that you have selected to print. Each page drop-down list is represented by a tab in the wizard. Select which items you wish to include from each page drop-down list by highlighting them with your mouse (Press Ctrl+click to select more than one page drop-down).
3. If you would like to include commentary, select the **Include Commentary** check box. For more information, see "Commentary" (p. 22).
4. If you would like to Include Zero Pages, select the **Include Zero Pages** check box. Selecting the Include Zero Pages option will print pages that contain only zero data. Including zero pages may cause the application to slow down. If you do not select this option, the pages that contained all zeros will not be printed.

5. Click **Next**.
6. If you would like to exclude a page, clear the check box next to the page. You can also change whether or not you want to include commentary or zero pages by selecting/clearing the check boxes.
7. Click **Finish**. The pages are loaded and the Print to *Excel*-Page Setup dialog box appears.
8. Format the page, margins, and sheet settings as necessary. You can also preview the page by clicking **Preview**.
9. Click **Print** to choose your printer.
10. Click **OK** to print the desired pages.

Steps using Contributor Print

1. To print, click **File**, **Print**. In Contributor print, only the current tab is printed.
2. You can set the following print options for Contributor Print:
   - Fit to page width
   - Fit to page height

Use Edit Options to Cut, Copy, Paste, and Delete Data

You can cut, copy, paste, and delete data in the grid.

When pasting into multiple cells, the target cells must be compatible with the data you are pasting into it. For example, you cannot paste a number into a cell that expects a date. If the target selection is a multiple of the source selection shape, the data will be replicated to fit the selection.

Step

- Select the required data or cells, right-click and select the appropriate option from the menu.

Importing and Exporting Data

You can load data, and export data to and from, a text file. If Get Data is enabled by your administrator, you can load data 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 Contributor as a tab separated text file.

Step

- Right-click the grid and click **Import from Text File**.

Export to Text File

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

Step

- Right-click the grid and click **Export to Text File**.

Get Data

Get Data, if enabled, lets you load data into Contributor, either from other Contributor cubes, or from external sources.

Step

- If available, click **File**, **Get Data**  . This option is not available offline.

Update Data

You can see the latest data in the Contributor grid by using the Update command.

You may need to do this when the data that you are viewing has been updated on the server, and you have received a message such as:

"The data help on the server for *<e.List item>* is more recent than that displayed".

You may be unable to edit until you have clicked **Actions**, **Update**.

Step

- To see the latest data in the Contributor grid, click **Actions**, and then click **Update**.

Reset Data

You can reset all data in all of the tabs to the last saved version.

Important: This also resets commentary.

Step

- Click **File**, **Reset All**.

Modifying the View

You can modify the view of Contributor data. You can:

- ❑ Swap items in rows and columns.
- ❑ Replace rows and columns with a page dimension.
- ❑ Replace a page dimension with a row or column heading.
- ❑ Change page dimensions displayed in the view.

- ❑ Hide pages, rows, or columns only displaying zeros.

Swap Items in Rows and Columns

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

Step

- From the **View** menu, click **Swap Rows and Columns** or click the Swap icon .

Replace a Row or Column With a Page Dimension

To change the view so that a row or column is replaced by a page dimension, do the following:

Step

- Press Shift, click anywhere in the row or column heading, and drag the row or column to the top of a page.

Replace a Page Dimension with a Row or Column Heading

To change the view so that a page dimension is replaced by a row or column heading, do the following:

Step

- Click the bar to the left of the page list box, and drag onto a column or row heading.

Change Page Dimensions Displayed in the View

To change the page dimensions displayed in the view, do the following:

Step

- Click the arrow and then select a new item from the list.

Hide Pages, Rows, or Columns Containing Only Zeros

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

Step

- From the **View** menu, click **Zero Suppression**, or the Zero Suppression icon , and then click **Pages**, **Rows**, or **Columns**.

Hiding a page containing only zeros may cause the application to slow down.

View Full Precision Numbers

When numeric values are rounded to a number of decimal places (specified by the format used for the cell in the Cognos 8 Planning - Analyst D-Cube), you can press F5 to view or edit the full precision number. When focus moves away from the cell, the display reverts to the normal rounding.

Save Data

After you enter data, you can save the data back to the server and recalculate summary level e.List items. You can open this e.List item again at a later date.

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, a 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

1. To save data on the server, click **Save**.

   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 Web grid.

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 **File** menu, click **Validate Data** or click the Validate Data toolbar button  .

Submit Data for Review

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

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.

To submit data, you must have submit rights.

Steps

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

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

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

   The pointer is moved to the first offending cell in the Web grid.

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 **File** menu, click **Validate Data** or click the Validate Data toolbar button .

   If no error messages appear, totals are calculated and the data is submitted to the reviewer.

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

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 .

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. 11).

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.

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	Example	Action
>	Copies right	5>	Copies the number 5 to the right
		inc6>	Increases the row by 6% for each value to the right
<	Copies left	add15<	Adds 15 to each value in the row to the left
|	Copies down	3|	Copies 3 down the column
		reset|	Resets the cells down the column to the last saved value
^	Copies up	hold^	Holds the cell values up the column
		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	Example	Action
K	Enters the cell value in thousands.	5K	Enters 5000
M	Enters the value in millions.	10M	Enters 10,000,000
Add, +	Adds a number to the cell value. **Important:** For Contributor for *Excel*, entering + does not do this. This indicates the start of a formula and overwrites any existing data in the cell.		
Subtract, Sub	Subtracts a number from the cell value. **Important:** A minus sign (-) is not permitted for subtract in the Contributor cells because this indicates a negative number in Contributor.	sub8	Subtracts 8 from the cell value
Multiply, Mul, *	Multiplies the cell value by a number.	mul3	Multiplies the cell value by 3
Percent, per, %	Multiplies the cell value by a number entered as a percentage. **Important:** For Contributor for *Excel*, entering % does not have the same effect. This converts the number to a percentage.	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 for *Excel*, entering Dec does not have the same effect. This is converted to a date format.	decrease6	Decreases the cell value by 6%
Power, Pow	Takes the cell value to the number entered as a power.	Pow10	Raises the value to the power of 10

Command	Description	Example	Action
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.	G10L	Increases the value by 10 percent of the original value each period.
Divide, Div, /	Divides the cell value by the number entered.	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.	Round100	Rounds all cells to the nearest 100, where 5475 becomes 5500
Hold, Hol	Holds the cell value from breakback calculations.		
Release, Rel	Releases held cells.		

Link to a Contributor Cell From Another Application

You can copy the universal resource location of a Contributor cell to the clipboard ready to be used by other applications. This enables you to link directly to the cell from another application.

In order for the link to work, the Contributor application must be available on the computer and the user must have appropriate rights.

Steps

1. Right-click the cell and click **Copy URL**.
2. Paste the location into the target application, such as, the address bar of a Web browser.

Commentary

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

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

Annotate Data

There are two types of annotations: user annotations, and audit annotations.

Enter User Annotations

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

You can annotate cells, tabs, or the model if you can edit or review the e.List item. If you have only View rights to an e.List item, you cannot annotate.

You can annotate a particular cell, tab or the model once in a session. A session ends when you save.

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

Steps

1. Right-click the cell, or tab that you want to annotate.
2. Click **Annotate**, then select **Cell**, **Tab**, or **Model**, and then click **Add** .
3. Type your note, and then click **OK**.
4. To view cell or tab annotations, move your mouse pointer over the red triangle in the top right-hand corner of the cell or, for tabs, at the top right-hand corner of the first column.

   To view a model annotation, right-click in the grid and click **Annotate**, **Model**, and then click **View**.

   To view all annotations for a model, right-click the model and click **Browse Commentary**. To view a large annotation in the Commentary Browser, right-click in the cell and click **View Annotation**.

   You can also browse annotations by clicking **View**, **Browse Commentary**.
5. If you want to edit an annotation made in the current session, right-click the cell, tab or model, click **Annotate**, then select **Cell**, **Tab**, or **Model**, and then click **Edit**.

   Note: Deleting all the text deletes the annotation.
6. Click **Save**.

   This will also save any data changes.

View Audit Annotations

Your administrator may have configured your application so that actions you take, such as typing data, importing files, and copying and pasting data, are recorded as audit annotations. In addition, system link history can then be stored as an annotation on the cube that was targeted by the link. If enabled, you can view audit annotations for any cells for which you have at least view access.

Steps

1. To view an audit annotation, right-click the cell, tab, or model and click **Browse Commentary**.
2. Under **Commentary Filter**, click **Audit Annotation**.

Add Links to Annotations

You can include links to Web pages, files and email addresses in annotations.

Link to a file only if you expect the file to be viewed by two or three people. If you expect more people to view the file, 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 the people viewing the annotation.

Steps

1. Right-click the cell, tab, or model annotation that you want to add a link to.
2. Click **Annotate**, then click **Cell**, **Tab**, or **Model**, and then click **Edit** to modify an existing annotation, or **Add** to add a new one.
3. To add a link, do one of the following:
   - To add a link to a Web page, in the annotation edit box, type a valid URL, such as: http://www.Cognos.com.
   - To add a link to an email address, type the HTML link command as follows:

     ```
     mailto:email address
     ```

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

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

   Tip: To view the annotation with a clickable link, right-click in the cell, tab or model, and click **Annotate**, then click **Cell**, **Tab**, or **Model**, and then click **View**.

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 the Contributor Administration Console. The attachments are stored in a Planning Application database.

The following default file types are allowed:

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

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 Contributor for *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 **Attached Documents** button or right-click in a cell and select 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 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.

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 screen, 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 only Attached Documents, click **Include Attached Documents**.

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

Chapter 3: Work Offline

If you need to work in Cognos 8 Planning - Contributor, but you are temporarily unable to connect to a network, you can work offline if you have sufficient rights. For example, you can view and edit your plan while travelling.

Important: Ensure that you bring your data online as soon as possible to prevent data loss in the event of administration changes, and to ensure accurate data readings.

Steps

1. Open the e.List item while online.
2. If you want to edit or annotate offline and you are not the current editor, click **Take ownership**  .
3. From the **File** menu, click **Work Offline**. This disconnects the server from this session while leaving the session open.

   You can now edit information offline.

   Note: In the offline browser, when you click **Save**, it saves to the offline store and does not connect to the server. Any annotations become read-only and data changes color to indicate that it was saved. You cannot view attached documents in offline mode, you will only be able to determine that a document is attached.

Take Work Back Online

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

Steps

1. In the offline browser, click **File**, **Work Online**.

   The online browser restarts and you are prompted to bring the offline data online.
2. Click **Yes**.

   The view you took offline opens with the current offline data and the offline browser closes. The data color reflects the changes between the current data and the data stored on the server.
3. To save or submit your changes to the server, do one of the following:
   - To save the changes you made while offline to the server, click **File**, and then click **Save**.
   - To submit the changes you made while offline to the server, click **File**, and then click **Submit**.

Chapter 4: Export Contributor Data to Excel

You can export Contributor data to Excel if this feature is enabled by your administrator. You can export data to Excel to create reports, charts, and manipulate the data using the functionality of 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 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. 30) 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 a 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.
- (Optional) 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*, etc.).
- 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: 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 Cognos 8 Planning - Contributor from various sources, including other Contributor tabs.

System Links

Systems Links are created by the Contributor administrator and are deployed to users in designated users, groups, or roles. System Links are defined in Contributor Administration Console 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 Links** dialog box lists all links (Local or System) that are available with your open 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 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. 32) and run (p. 31) 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.

- **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 an 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 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 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 an 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. 34).

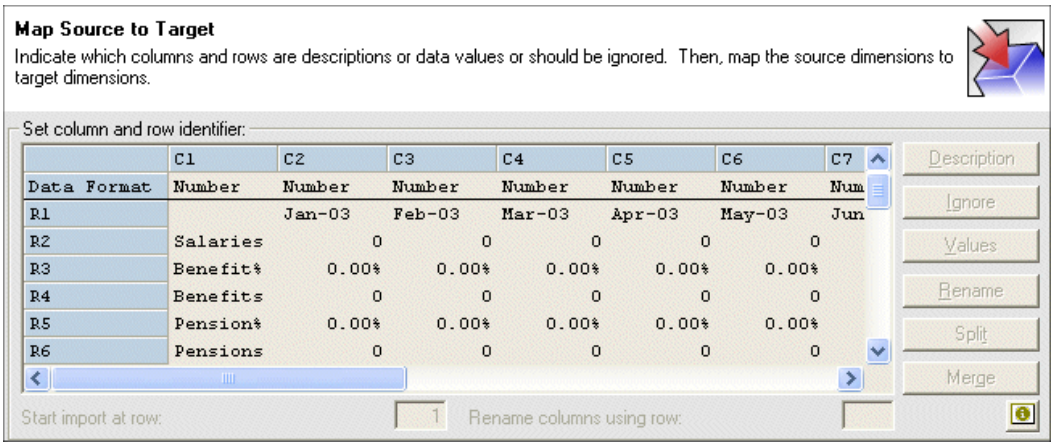
17. If you want, split a column or merge dimensions (p. 35).

    You must now map the dimensions.

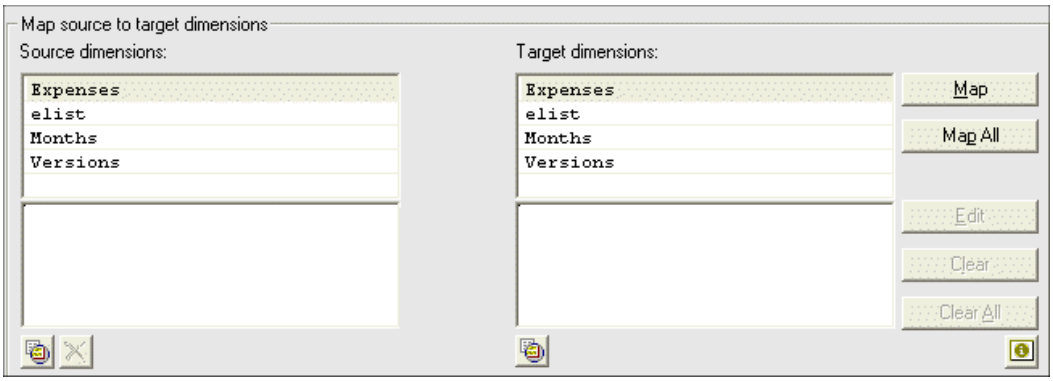
The Map Source to Target Dialog Box

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**.

Renaming Columns Using Row Header

To use row header, do the following:

- 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**.

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 **Run Loads** 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 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 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 Contributor Administration Console.

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. 39). 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 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 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 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 the Cognos 8 Planning - Contributor Administration Console. This causes the download to stop.

Confirm that the CAB files are copied to the Controls folder of the Contributor Web site at *install_location*\c8\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 *Excel* report and the current model data within Contributor that will be used to refresh the report. If the two structures are different, a message will appear notifying you of the difference and ask you whether 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

application

In Cognos Planning, a Contributor application. Contributor applications are used for the collection and review of data from hundreds, or thousands of Web servers. One application can be used by many users in different locations at the same time.

breakback

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

Cognos Planning - Analyst

A tool for defining business plans. It enables you to establish the structure that defines the key drivers and content required for planning, budgeting, and forecasting, and the distribution of templates to managers.

commentary

In Cognos Planning, commentary represents any additional information attached to Contributor cells, tabs, or e.List items, including both user annotations and attached files. You can use administration links, system links and local links to copy commentary.

contribution

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

Contributor Administration Console

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

cube

A physical data source containing a multidimensional representation of data. A cube contains information organized into dimensions and optimized to provide faster retrieval and navigation in reports. In Cognos Planning, a cube (see also D-Cube) corresponds to a tab on Contributor client user interface.

current owner

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

dimension

In Cognos Planning, the rows, columns, and pages of a cube are created from dimensions. Dimensions are lists of related items such as Profit and Loss items, months, products, customers, and cost centers. Dimensions also contain all the calculations. One dimension can be used by many cubes.

In Cognos 8 BI a dimension is a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or markets. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members.

D-link

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

D-list

An alternative term for dimension.

e.List

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

editor

In Cognos Planning, a planner or reviewer who is editing a contribution

extensions

In Cognos Planning, extends the functionality of the Contributor Administration Console and Web Client. There are two types of extensions: Admin Extensions and Client Extensions. Admin Extensions run in the Administration Console. Client Extensions are activated from the tool options on the Contributor Grid.

hold

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

lock

In 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.

owner

In Contributor, a user who is assigned to an e.List item through the Rights screen and is permitted to edit or review it. These rights may be directly assigned, or may be inherited.

planner

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

protect

In Cognos Planning, a function that is used to prevent data from being typed into a cell. However, data can still be transferred into a protected cell via a D-Link.

publish

In Cognos 8 BI, refers to the creation of a package that makes metadata available to the Cognos 8 server. Information in the package is used to create reports and other content.

In Cognos Planning, refers to a function that is used to copy the data from Contributor or Analyst to a datastore, typically so it can be used for reporting purposes.

reconciliation

In Cognos Planning, a process that ensures that the copy of the Contributor application that the user accesses on the Web is up to date, for example, all data is imported. Reconciliation takes place after Go to Production has run and a new production application is created.

refresh

In Cognos Planning, this occurs when you update data in an existing report or an export saved selection using an extension.

reviewer

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

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