

Cognos® 8 Planning

CONTRIBUTOR FOR *MICROSOFT EXCEL*®

INSTALLATION GUIDE



COGNOS®

THE NEXT LEVEL OF PERFORMANCE™

Product Information

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Table of Contents

Introduction 5

Chapter 1: Install Cognos 8 Planning Contributor *for Microsoft Excel* 7

Chapter 2: Troubleshooting 9

 The Contributor Menu Item Does Not Appear in the Excel Toolbar 9

 The Installation Process Failed 9

Index 11

Introduction

This document is intended for use with Cognos 8 Planning. It provides the information you need to install Contributor Add-in *for Microsoft Excel*.

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 Microsoft Excel.

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
<i>Contributor for Microsoft Excel User Guide</i>	Using Contributor <i>for Microsoft Excel</i>
<i>Contributor Work Offline Guide</i>	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.

Using Quick Tours

Quick tours are short online tutorials that illustrate key features in Cognos product components. To view a quick tour, start Cognos Connection and click the **Quick Tour** link in the lower-right corner of the Welcome page.

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (<http://support.cognos.com>). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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Chapter 1: Install Cognos 8 Planning Contributor *for Microsoft Excel*

Install Contributor *for Microsoft Excel* to view and edit Contributor data using Microsoft Excel formatting and linking functionality.

Do not install Contributor *for Microsoft Excel* on a computer that already has Analyst or Contributor Administration installed on it.

If you are installing on Windows Vista and User Account Control (UAC) is enabled, you must start the installation wizard using **Run As Administrator**.

Before you install the Contributor *for Microsoft Excel*, ensure that your computer meets the necessary software and hardware requirements. Apply all required operating system patches and use only the versions of third-party software that are supported for Cognos products. Otherwise your product may not work properly. For information about software environments and versions supported by Cognos products, see the Product Information page of the Cognos Global Customer Services Web site (<http://support.cognos.com>).

If you are installing Contributor *for Microsoft Excel* on multiple computers, ensure that you install the same version on each computer.

If you have an older version of Contributor *for Microsoft Excel*, we recommend that you uninstall it before you install the Cognos 8 version. Uninstalling does not remove any XLS worksheets that you have saved.

Steps

1. Insert the CD for Cognos 8 Planning - Contributor *for Microsoft Excel* or go to the installation source file directory.

The **Welcome** page of the installation wizard appears when you insert the CD.

If no **Welcome** page appears or you are not installing from the CD, go to the win32 directory, and double-click `issetup.exe`.

If you are using Windows Vista and UAC is enabled, right-click `issetup.exe`, and select **Run As Administrator**.

2. Select the language to use for the installation.
3. Follow the directions in the installation wizard to copy the required files to your computer.

If you are installing in a directory that already has other Cognos 8 Planning components, you are prompted for the location of a directory in which to store backup copies of the files that will be overwritten.

4. Click **Finish**.

After you install the client, you can access the Cognos 8 Planning portal to use Contributor Web. The Contributor Web client does not require any configuration.

Chapter 2: Troubleshooting

Use this troubleshooting reference information and solutions as a resource to help you solve specific problems you may encounter during or after the installation of Cognos 8 Planning components.

When you are troubleshooting, log files can help you. Another valuable troubleshooting tool is the Knowledge Base, which is available on the Cognos Global Customer Services Web site (<http://support.cognos.com>). The Knowledge Base is a database of problems and solutions for all Cognos products.

When you cannot resolve a problem, the final resource is your Cognos technical support representative. To analyze a problem, your technical support representative requires information about the situation and the symptoms that you are experiencing. To help isolate the problem, collect the necessary data before you contact your representative.

The Contributor Menu Item Does Not Appear in the Excel Toolbar

If the Contributor menu item does not appear after installing the Add-in, the menu item may not have been automatically added during the installation process.

If this occurs, you can manually add the Contributor menu item to the Excel toolbar.

Steps to Add the Contributor Menu Item

1. In Excel, click the **Tools** menu, and then click **Add-Ins**.
2. In the *installation_location*\bin folder, open the ContribForExcel.xla file.

The Installation Process Failed

During the installation process, an error message appears telling you that the installation has failed.

When an installation failure occurs, a log file containing detailed information is created in the following location: *installation_location*\bin\SetupXLA.log. Open up the log file to determine the cause of the failure and then take any corrective measures.

Index

B

best practices, [5](#)

C

Cognos 8

troubleshooting Contributor Add-in for Excel
installations, [9](#)

Contributor for Microsoft Excel

installing, [7](#)

Contributor menu item does not appear, [9](#)

copyright material

printing, [6](#)

F

failed installation, [9](#)

finding information, [6](#)

G

Global Customer Services Web site, [6](#)

H

help

getting, [6](#)

I

information

finding, [6](#)

installing

clients on Windows Vista, [7](#)

introduction, [5](#)

P

printing copyright material, [6](#)

Q

quick tours

using, [6](#)

R

related documentation, [5](#)

T

toolbar

Contributor menu item does not appear in Excel
toolbar, [9](#)

troubleshooting, [9](#)

W

Windows Vista

installing clients on, [7](#)