

IBM Cognos for Microsoft Office  
Version 11.1.0

*Installation Guide*





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# Introduction

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IBM® Cognos® for Microsoft Office is an add-in for retrieving content from IBM Cognos Analytics reporting products, such as IBM Cognos Report Studio and IBM Cognos PowerPlay® Studio, for use with Microsoft Office.

This application may be used by data modelers, business analysts, and financial analysts who analyze enterprise data to identify trends, opportunities, problems, or project characteristics.

## Audience

This information assumes that you are familiar with IBM Cognos products, such as IBM Cognos Analytics and PowerPlay. You should also be familiar with Microsoft Office systems, such as the Microsoft Excel spreadsheet software, Microsoft Word, and Microsoft PowerPoint presentation graphics program.

## Finding information

To find product documentation on the web, including all translated documentation, access [IBM Knowledge Center](http://www.ibm.com/support/knowledgecenter/SSEP7J/welcome) (<http://www.ibm.com/support/knowledgecenter/SSEP7J/welcome>). Release Notes are published directly to IBM Knowledge Center and include links to the latest technotes and APARs.

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

## Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. IBM Cognos for Microsoft Office has accessibility features. For information on these features, see [Appendix A, “Accessibility features,”](#) on page 19.

## 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

The Sample Outdoors Company, Great Outdoors Company, GO Sales, any variation of the Sample Outdoors or Great Outdoors names, and Planning Sample depict fictitious business operations with sample data used to develop sample applications for IBM and IBM customers. These fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values is coincidental. Other sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.



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# Chapter 1. What's new?

This section contains a list of new or changed features for this release. It also contains a cumulative list of similar information for previous releases. It helps you to plan your upgrade and application deployment strategies and the training requirements for your users.

For information about new IBM Cognos Analytics features for this release, see the *IBM Cognos Analytics New Features Guide*.

For changes to previous versions, see:

- [“New features in version 10.1.1” on page 2](#)
- [“Changed features in version 10.1.0” on page 2](#)

To review an up-to-date list of environments supported by IBM Cognos products, including operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit [IBM Software Product Compatibility Reports \(http://publib.boulder.ibm.com/infocenter/prodguid/v1r0/clarity/index.jsp\)](http://publib.boulder.ibm.com/infocenter/prodguid/v1r0/clarity/index.jsp).

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## New features in version 11.0.0

This section lists new features since the last release.

- This release includes a refreshed user interface.
- Cognos for Microsoft Office version 11.0.0 supports Microsoft Office 2010, 2013, and 2016.
- Cognos for Microsoft Office can be used concurrently with Planning Analytics for Excel version 2.0.26 or higher. Updating to the latest version is recommended.
- Cognos for Microsoft Office version 11.0.0 requires Microsoft .NET framework 4.6.1 or higher.

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## New features in version 10.2.0

The information later in this section lists new features since the last release. Links to directly related topics are included.

- IBM Cognos Office products, such as IBM Cognos for Microsoft Excel and IBM Cognos for Microsoft Office now require the use of Microsoft .NET Framework 4.

This updated conformance has implications for upgrading systems. If you are a current user of an IBM Cognos Office product and installed only Microsoft .NET Framework 2, you must also install .NET Framework 4. You must install the updated .NET Framework before installing IBM Cognos Office products. Microsoft .NET Framework versions can work along side each other. You do not need to uninstall previous versions.

- Additional language support

The following additional languages are available for IBM Cognos Office products: Croatian, Danish, Kazakh, Slovenian, and Thai.

## New features in version 10.1.1

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The information later in this section lists new features since the last release. Links to directly related topics are included.

### Enhancements to supported environments and platforms

Enhancements were made to extend support for multiple platforms and environments.

#### Support for 64-bit installation

IBM Cognos for Microsoft Office supports a 64-bit environment, which provides better memory management and improved scalability and performance. You now have a choice between installing and running 32-bit and 64-bit versions of IBM Cognos for Microsoft Office. The IBM Cognos application is able to run in a 32-bit and 64-bit Microsoft Office version of Word, PowerPoint, or Excel, on a 64-bit operating system.

If you perform a 64-bit installation, the default path that is used for installation is different from the default path that is used in a 32-bit installation. The following is the default installation directory:

- x64 default directory: C:\Program Files\IBM\cognos\Cognos for Microsoft Office
- x86 default directory: C:\Program Files (x86)\IBM\cognos\Cognos for Microsoft Office

For more information, see [“Installing IBM Cognos for Microsoft Office on a x64 Windows system”](#) on page 13.

#### Support for Microsoft Office 2010

Version 2010 of the Microsoft Word, PowerPoint, and Excel software is now supported for IBM Cognos for Microsoft Office.

Because the new Office Open XML format is a recognized industry standard supported by ECMA International, the new format, which is supported by Microsoft Office 2010, facilitates extensibility and interoperability by enabling implementations on multiple platforms.

#### Support for Mozilla Firefox

Version 4 of the Mozilla Firefox web browser is now supported for IBM Cognos for Microsoft Office.

#### Support for Internet Explorer

Version 9 of the Microsoft Internet Explorer web browser is now supported for IBM Cognos for Microsoft Office.

### Additional language support

In addition to Japanese, German, and French, the documentation and the user interface for the installation and product are available in Norwegian.

## Changed features in version 10.1.0

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The following are changes to features since the last release. Links to directly-related topics are included, if applicable.

### IBM Cognos Go! Search is renamed

In earlier releases, enhanced search capabilities were available by installing IBM Cognos Go! Search with the IBM Cognos Analytics server product. The enhanced search capability is now the default search mode in the IBM Cognos Analytics server product. Your IBM Cognos Analytics administrator does not have to



install a separate package, but some configuration is required to set up index sharing for scalability and at least one index must be created before the enhanced search capability can be used.

## **IBM Cognos Go! Dashboard is renamed**

In earlier releases of IBM Cognos BI, an interactive dashboard application was available by installing IBM Cognos Go! Dashboard with the IBM Cognos BI server product. In version 10.1.0, IBM Cognos Go! Dashboard is renamed as IBM Cognos Business Insight and is part of the IBM Cognos BI server product. Your IBM Cognos BI administrator does not have to install a separate package, but some tasks are required, including configuring access to the secured functions and features.

In version 10.2.0, IBM Cognos Business Insight is renamed as IBM Cognos Workspace.



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## Chapter 2. Preparing to install

Before you install the IBM Cognos Office components, you must set up resources in your environment so that the components can operate.

Use the following checklist to guide you through the setup process:

- [Review the release notes before you install.](#)
- [Supported environments](#)

After you complete these tasks continue with [Chapter 3, “Installing IBM Cognos for Microsoft Office,”](#) on page 7.

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### Review the Release Notes before you install

Before you install your IBM Cognos product, it is important to be aware of all issues that may affect your installation strategy.

There may be late-breaking issues that were not known when this installation guide was created.

Review the Release Notes before you install your product. The Release Notes contain late-breaking information about known issues, and documentation updates and deprecation notices. The Release Notes are available from the documentation link in the installation wizard and on the [IBM Knowledge Center](https://www.ibm.com/support/knowledgecenter/SSEP7J_11.0.0/welcome) ([https://www.ibm.com/support/knowledgecenter/SSEP7J\\_11.0.0/welcome](https://www.ibm.com/support/knowledgecenter/SSEP7J_11.0.0/welcome)).

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### Supported environments

To ensure that your product works properly, apply all minimum required operating system patches, and use only the supported versions of third-party software.

To review an up-to-date list of supported environments, visit the [IBM Software Product Compatibility Reports](http://www.ibm.com/software/reports/compatibility/clarity) (<http://www.ibm.com/software/reports/compatibility/clarity>). The website provides information about requirements related to the following parts of your environment.

- Operating systems
- Patches or service packs or equivalent
- Web browsers
- Web servers
- Directory servers
- Database servers
- Application servers

Unless otherwise indicated, IBM Cognos products are compatible with later versions of patches and service packs from the versions stated.

It is important to note that the Linux<sup>®</sup> operating system is available in a number of distributions and supports a number of hardware platforms. Ensure that the combination of the operating system and hardware that you are using is supported.

#### **Cognos products and virtualization environments**

The [IBM virtualization policy](https://www.ibm.com/support/docview.wss?uid=ibm10719833) (<https://www.ibm.com/support/docview.wss?uid=ibm10719833>) describes IBM support for virtualization environments.



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## Chapter 3. Installing IBM Cognos for Microsoft Office

To use IBM Cognos for Microsoft Office, you must install Microsoft .NET Framework 4.6.1 or later and the IBM Cognos for Microsoft Office components.

The IBM Cognos Analytics samples include samples for IBM Cognos for Microsoft Office. The samples illustrate product features and technical and business best practices using data from a fictitious company, The Sample Outdoors Company. You can also use them for experimenting with and sharing report design techniques, and for troubleshooting. To use the samples, you must have your administrator set up and configure them or contact your administrator to find out where they are installed. For instructions on how to set up and configure samples, see the IBM Cognos Analytics *Installation and Configuration Guide* or the IBM Cognos Analytics *Administration and Security Guide*.

You must first uninstall older components of IBM Cognos for Microsoft Office products before you can install the new components.

For more information, see

- [Installing Microsoft .NET Framework](#)
- [Uninstalling the previous version of IBM Cognos for Microsoft Office products](#)
- [Installing IBM Cognos for Microsoft Office components](#)
- [Configuring IBM Cognos for Microsoft Office](#)
- [Testing IBM Cognos for Microsoft Office](#)

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### Upgrading IBM Cognos for Microsoft Office

There is no action required to update the server components for IBM Cognos for Microsoft Office. They are included in the upgrade to the new version of IBM Cognos Analytics. Users of the client components must first uninstall the older version and then run a setup file that installs a new version of Microsoft .NET Framework, updates the .NET components, and installs the new version of IBM Cognos for Microsoft Office.

#### About this task

To upgrade reports, users must open them in the new version and then save them.

To support the addition of other IBM Cognos products that work with Microsoft Office, the name used to install the new product is now IBM Cognos for Microsoft Office. This name is used in the installation wizard and in the name of the action pane that appears in your Microsoft Office product after upgrading. In addition, the name of the default installation directory is changed to IBM Cognos for Microsoft Office.

If you deployed IBM Cognos for Microsoft Office enabled files or templates, you do not have to revise the custom properties in the new version. The custom properties and templates are no longer required.

#### Procedure

To upgrade IBM Cognos for Microsoft Office, you first uninstall the older components and then install the new components.

1. Install the current supported version of Microsoft .NET Framework.
2. Uninstall the older components for IBM Cognos for Microsoft Office.
3. Install the new components for IBM Cognos for Microsoft Office.
4. Test the installation.

## Results

After installing the software, you can open all existing business intelligence content. To save the content with the new features and functionality of IBM Cognos for Microsoft Office, republish it to IBM Cognos Connection.

## Installing Microsoft .NET Framework

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IBM Cognos for Microsoft Office requires Microsoft .NET Framework version 4.6.1 or later to be installed on all user computers.

When you install Microsoft .NET Framework on a non-English operating system, Microsoft .NET error messages, shortcuts, and utilities appear in English.

For a language other than English, you can apply the Microsoft .NET Framework Language Pack to view error messages, shortcuts, and utilities in the language of your operating system. For example, if your operating system is French and you installed Microsoft .NET Framework, you must also apply Microsoft .NET French Language Pack.

If you have an earlier version of .NET Framework, you can install a later version on top of it. Earlier versions must be installed before later versions.

### Procedure

1. Go to the Microsoft download website.
2. Search for .NET Framework 4.6.1 or later, select the redistributable package, and follow the instructions to download it.  
The .NET Framework redistributable package is available as a stand-alone executable file. The name of the file depends on the type of targeted platform. For 32-bit processors, download the x86 version; for 64-bit processors, download the x64 version.
3. Check for other security updates that relate to your version of .NET Framework and download them.

## Uninstalling previous versions of IBM Cognos for Microsoft Office products

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If you have a previous version of IBM Cognos for Microsoft Office or other IBM Cognos for Microsoft Office products, you must uninstall all previous versions before you can install the new version of IBM Cognos for Microsoft Office.

The uninstall does not completely remove all application files or directories during the uninstall process; therefore, you may have to perform this action manually.

If you installed more than one component in the same location, you can choose the packages to uninstall using the uninstall wizard. All components of the package will be uninstalled.

### Before you begin

Before uninstalling, close all Microsoft Office applications.

### Procedure

1. From the **Start** menu, click **Programs>IBM Cognos for Microsoft Office>Uninstall IBM Cognos>Uninstall IBM Cognos**.

The **Uninstall** wizard appears.

**Tip:** IBM Cognos for Microsoft Office is the default name of the Program Folder that is created during the installation. If you chose another name, go to that folder to find the program.

2. Follow the instructions to uninstall the component.

The cognos\_uninst\_log.txt file records the activities that the Uninstall wizard performs while uninstalling files.

**Tip:** To find the log file, look in the Temp directory.

## Installing IBM Cognos for Microsoft Office

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To install IBM Cognos for Microsoft Office, you run an issetup.exe file from the appropriate directory on the product CD or central LAN location. The file installs a security update for Microsoft .NET Framework and then installs the IBM Cognos for Microsoft Office components.

To deploy IBM Cognos for Microsoft Office with PowerPlay, you can configure gateway mappings so that IBM Cognos for Microsoft Office users can access PowerPlay reports that reside on a PowerPlay server. You can also configure the size of report that can be imported from IBM Cognos Analytics to IBM Cognos for Microsoft Office. For more information about gateway mappings and report size limits, see the IBM Cognos *Administration and Security Guide*.

Application samples for IBM Cognos for Microsoft Office are on a separate disk. If you want to use the samples, your IBM Cognos Analytics administrator must install them from the IBM Cognos Analytics Samples disk.

### Before you begin

IBM Cognos for Microsoft Office is available as a 32-bit and 64-bit installation. You can install the 32-bit client on a 64-bit operating system, but the 32-bit and 64-bit clients cannot coexist on the same Windows computer.

For more information about installing the 64-bit version, see [“Installing IBM Cognos for Microsoft Office on a x64 Windows system”](#) on page 13.

Before you update and install components, ensure that you complete the following tasks:

- Have administrative privileges on the computer.
- Have installed Microsoft .NET Framework 4.6.1 or later.
- Have uninstalled any previous version of IBM Cognos for Microsoft Office.
- Have the appropriate license to use your IBM Cognos for Microsoft Office product.

### Procedure

1. Insert the IBM Cognos for Microsoft Office CD or go to the location where the installation files were downloaded.

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

2. If no **Welcome** page appears or you are not installing from the CD, go to the win32 directory, and double-click issetup.exe.
3. Select the language to use for the installation

The language that you select determines the language of the user interface. You can change the language to any of the installed languages after installation.

4. In the **License Agreement** page, select **I Agree** and then click **Next**.
5. Repeat step 4 for the non-IBM license agreement.
6. In the **Installation Location** page, select the installation directory, and click **Next**.

The following are the default installation paths:

- If installing on 32-bit Windows, C:\Program Files\IBM\cognos\Cognos for Microsoft Office\
- If installing on 64-bit Windows, C:\Program Files (x86)\IBM\cognos\Cognos for Microsoft Office\

If a windows is displayed, advising you to uninstall a previous version of the IBM Cognos Office product, follow the prompts and uninstall the previous version, and then resume the installation.

7. In the **Component Selection** page, select **IBM Cognos for Microsoft Office**, and then click **Next**.
8. Follow the directions in the installation wizard to copy the required files to your computer.
9. In the **Finish** page of the installation wizard, if you want to see late-breaking information about IBM Cognos components, click **View IBM Cognos Release Notes**.
10. Click **Finish**.

## Results

If you want to use the samples that are available for IBM Cognos for Microsoft Office or IBM Cognos Analytics, your administrator must install the IBM Cognos Analytics samples. For more information, see the IBM Cognos Analytics *Installation and Configuration Guide*.

## Configuring IBM Cognos for Microsoft Office

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After installing IBM Cognos for Microsoft Office, you can configure settings so that users can access PowerPlay reports that reside on a PowerPlay server or change the macro security for Microsoft Office XP.

For more information, see the following topics:

- [Enabling anonymous access for PowerPlay](#)
- [Installing the CA certificate for the HTTPS Interface to Series 7 PowerPlay](#)
- [Setting macro security level for Microsoft Office XP](#)

### Enabling anonymous access for PowerPlay

When using single signon with Microsoft Internet Information Services (IIS), anonymous access must be enabled for users to access IBM Cognos for Microsoft Office documents that are based on PowerPlay reports. If necessary, a second PowerPlay gateway can be used to provide anonymous access for IBM Cognos for Microsoft Office.

For more information, see the topic about specifying gateway mappings in the IBM Cognos *Administration and Security Guide*.

The administrator must follow these steps to enable Anonymous Access in IIS.

#### Procedure

1. On each computer where Content Manager is installed, start IBM Cognos Configuration.
2. In the **Explorer** window, under **Security, Authentication**, click **Cognos**.
3. In the **Properties** window, click the box next to the **Allow anonymous access** property and then click **True**.
4. From the **File** menu, click **Save**.

### Install the CA Certificate for the HTTPS Interface to Series 7 PowerPlay

If your environment includes IBM Cognos Series 7 PowerPlay Enterprise Server and you are using the HTTPS (https://) interface to access Series 7 PowerPlay, you must install a certificate issued by a certificate authority (CA). The CA certificate is required for secure sockets layer (SSL) support.

#### Procedure

1. Retrieve the CA certificate from your administrator.  
The file has a .cer extension.
2. Double-click the .cer file, click **Install Certificate**, and then click **Next**.
3. Click **Place all certificates in the following store**.
4. Click **Browse**, click **Trusted Root Certification Authorities**, and then click **Next**.
5. Click **Finish**.



## Set Macro Security Level for Microsoft Office XP

For Microsoft Office XP applications to run IBM Cognos for Microsoft Office, you must set your macro security level to an appropriate level. You must set this for Microsoft Office Excel, Microsoft Office Word, and Microsoft Office PowerPoint.

### Procedure

1. Open your Microsoft Office XP application.
2. From the **Tools** menu, click **Macros**, and then click **Security**.
3. Choose whether to change the security level or the trusted publishers.
  - On the **Security Level** tab, click **Medium** or **Low**, and then click **OK**
  - On the **Trusted Publishers** tab, select **Trust all installed add-ins or templates**, and then click **OK**.

## Testing IBM Cognos for Microsoft Office

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You can test the installation of the client components by starting the application. IBM Cognos for Microsoft Office starts automatically when users start Microsoft Excel, Microsoft Word, Microsoft PowerPoint, or when users open a Microsoft Office workbook, document, or presentation. Users can then link to IBM Cognos for Microsoft Office.

### Procedure

1. Start Microsoft Excel, Word, or PowerPoint or open a Microsoft Office workbook, document, or presentation.
2. Confirm that **IBM Cognos** appears in the toolbar.

If **IBM Cognos** is not in the toolbar, from the **View** menu, click **Toolbars, IBM Cognos for Office**.
3. To show the action pane, click **IBM Cognos** in the toolbar.

The **Welcome** pane appears on the right side of the window. It includes a link to IBM Cognos for Microsoft Office.

4. Click **IBM Cognos for Microsoft Office** in the action pane.

The heading of the action pane changes to **IBM Cognos for Microsoft Office**. You can switch between action panes by clicking the **IBM Cognos Welcome**, **IBM Cognos Analysis** and **IBM Cognos for Microsoft Office** icons on the action pane.

### What to do next

The IBM Cognos Analytics administrator sets access permissions for content. For more information about the access permissions required to work with Cognos Analytics content, see the IBM Cognos for Microsoft Office *User Guide*.



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## Chapter 4. Installing the 64-bit version of IBM Cognos for Microsoft Office

The default installation directory that is used by IBM Cognos for Microsoft Office depends on the version that you install. The default paths that are used for the 64-bit installation are different from the default paths that are used in the 32-bit installation.

When you install applications on a x64 (64-bit) Windows system, the program files for 32-bit and 64-bit applications are installed into different directories as follows:

- 64-bit applications are installed to C:\Program Files
- 32-bit applications are installed to C:\Program Files (x86)

For example, if you select the default installation location when you install either version of IBM Cognos for Microsoft Office, the program files are installed in the following directories:

- x64 default directory: C:\Program Files\IBM\cognos\Cognos for Microsoft Office
- x86 default directory: C:\Program Files (x86)\IBM\cognos\Cognos for Microsoft Office

Consider the following conditions and limitations when installing either the 32-bit or 64-bit version of the product:

- You can run 64-bit and 32-bit Microsoft Office on a 64-bit Microsoft Windows.
- The version of the product that you are installing must match the Microsoft Office version that is installed on the same computer. For example, if you installed 64-bit Office, install the 64-bit version of IBM Cognos for Microsoft Office.
- If you installed 32-bit Office, on a 32-bit or 64-bit Windows, install the 32-bit version of IBM Cognos for Microsoft Office.
- The 64-bit version of IBM Cognos for Microsoft Office does not run on 32-bit Office that is installed on 64-bit Windows.
- If you are an Excel power user working with large amounts of data and need to work with file sizes greater than 2 GB, the 64-bit Office is better able to utilize more memory. If not, use the 32-bit Office 2010 as the default installation on both 32-bit and 64-bit Windows. You will have compatibility with existing 32-bit controls, add-ins, such as IBM Cognos for Microsoft Office, and VBA. 32-bit Office applications on 64-bit Windows are able to open, edit, present documents, and switch among applications faster than on 32-bit Windows.

No special steps are required to install the 32-bit version of IBM Cognos for Microsoft Office in a Microsoft Windows x64 environment. There is support for the 32-bit application to run seamlessly on 64-bit Windows using Windows-32-on-Windows-64 (WOW64). WOW64 is provided with the operating system and you do not have to explicitly enable it. The 64-bit Windows system detects that the program being installed is a 32-bit application and automatically installs it into the WOW64 space.

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### Installing IBM Cognos for Microsoft Office on a x64 Windows system

To install the 64-bit version of IBM Cognos for Microsoft Office, you run an `issetup.exe` file from the appropriate directory on the product CD or central LAN location. The file installs a security update for Microsoft .NET Framework and then installs the IBM Cognos for Microsoft Office components.

#### Before you begin

IBM Cognos for Microsoft Office is available as a 32-bit and 64-bit installation. You can install the 32-bit client on a 64-bit operating system, but the 32-bit and 64-bit clients cannot coexist on the same Microsoft Windows computer.

Before you update and install components, ensure that you

- have administrative privileges on the computer
- installed Microsoft .NET Framework 4.6.1 or later
- uninstalled any previous version of IBM Cognos for Microsoft Office
- have the appropriate license to use your IBM Cognos for Microsoft Office product

## About this task

This section describes how to install the 64-bit version of IBM Cognos for Microsoft Office on a single, 64-bit Microsoft Windows system, such as Windows XP Professional x64.

To deploy IBM Cognos for Microsoft Office with PowerPlay, you can configure gateway mappings so that IBM Cognos for Microsoft Office users can access PowerPlay reports that reside on a PowerPlay server. You can also configure the size of report that can be imported from IBM Cognos Analytics to IBM Cognos for Microsoft Office. For more information about gateway mappings and report size limits, see the IBM Cognos Analytics *Administration and Security Guide*.

Application samples for IBM Cognos for Microsoft Office are on a separate disk. If you want to use the samples, your IBM Cognos Analytics administrator must install them from the IBM Cognos Analytics Samples disk.

## Procedure

1. Insert the IBM Cognos for Microsoft Office CD or go to the location where the installation files were downloaded.

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

2. If no **Welcome** page appears or you are not installing from the CD, go to the winx64h directory, and double-click `issetup.exe`.
3. Select the language to use for the installation

The language that you select determines the language of the user interface. You can change the language to any of the installed languages after installation.

4. In the **License Agreement** page, select **I Agree** and then click **Next**.
5. Repeat step 4 for the non-IBM license agreement.
6. In the **Installation Location** page, select the installation directory, such as `C:\Program Files\IBM\cognos\Cognos for Microsoft Office\`, and then click **Next**.

If a dialog box is displayed advising you to uninstall a previous version of IBM Cognos Office product, follow the prompts and uninstall the previous version, and then resume the installation.

7. In the **Component Selection** page, select **IBM Cognos for Microsoft Office**, and then click **Next**.
8. Follow the directions in the installation wizard to copy the required files to your computer.
9. In the **Finish** page of the installation wizard, if you want to see late-breaking information about IBM Cognos components, click **View IBM Cognos Release Notes**.
10. Click **Finish**.

## Results

If you want to use the samples that are available for IBM Cognos for Microsoft Office or IBM Cognos Analytics, your administrator must install the IBM Cognos Analytics samples. For more information, see the IBM Cognos Analytics *Installation and Configuration Guide*.

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## Chapter 5. Access permissions and credentials

When a content store is initialized, the IBM Cognos Business Intelligence administrator sets the access permissions for your organization's data. He or she specifies which users and groups have access to a specific report or other content in IBM Cognos software. The administrator also specifies the actions users can perform on the content. These permissions can be modified at any time to accommodate changes within the organization.

For more information about setting access permissions, see the *IBM Cognos Administration and Security Guide*.

For users of IBM Cognos for Microsoft Office, specific permissions must be granted for the following types of activities:

- Retrieving data from the content store to create reports and viewing reports in IBM Cognos Viewer. For more information, see [“Permissions for viewing and importing reports”](#) on page 15.
- Refreshing data or folders, and viewing contents of packages or folders. For more information, see [“Permissions for viewing or editing the contents of a package or a folder”](#) on page 16.
- Downloading Microsoft Office documents from and publishing Microsoft Office documents to IBM Cognos Connection. For more information, see [“Permissions for accessing IBM Cognos Connection”](#) on page 16.

### Access permissions for users

At minimum, users must have traverse and read permissions for the parent entries of the entries in IBM Cognos Connection that they want to access. The parent entries include container objects such as folders, packages, groups, roles, and namespaces.

**Note:** If the administrator has granted users or the group to which users belong execute and traverse permissions on the package, they can run reports from a package, but not open the package in an IBM Cognos studio.

### Access to IBM Cognos Connection entries associated with data sources secured against multiple namespaces

Data sources in IBM Cognos software can be secured against multiple namespaces. In some environments, the namespace used to secure the data source is not the primary namespace used for access to IBM Cognos Connection. When users try to access an entry that is associated with a data source secured against multiple namespaces, they must be logged on to all of the required namespaces.

When single signon (SSO) is enabled, users are automatically logged on to the namespace.

This functionality applies to IBM Cognos Viewer only.

---

## Permissions for viewing and importing reports

The table describes access permissions that are required for viewing and importing reports from the content store.

Goal	Permissions
View a report or a report output version, including reports in the result set of a search.	Execute and Traverse

<i>Table 1. Permission requirements to view and import reports (continued)</i>	
<b>Goal</b>	<b>Permissions</b>
View the folder or package that contains the report.	Traverse
Import a report version with the most recent content changes. <b>Note:</b> The <b>Select a specific output version</b> check box in the Import wizard is disabled.  For data sources, connections, and signons, retrieve data from a data provider. Users cannot read the database information directly. The report server can access the database information on their behalf to process a request.	Read and Execute
Import a report from a saved report output version.	Read and Traverse

## Permissions for viewing or editing the contents of a package or a folder

Access permissions are required to refresh data from the content store or view or search contents of a package or a folder.

<i>Table 2. Permission requirements to view or edit a package or folder</i>	
<b>Goal</b>	<b>Permissions</b>
View the contents of a package or a folder, without full access to the content of the folder.  <b>Note:</b> Users can view the general properties of the entries in IBM Cognos Connection for which they have any type of access. The general properties include name, description, creation date, and so on, which are common to all entries.	Traverse
Download Microsoft Office documents that were published to IBM Cognos Connection	Read
Refresh the Public Folders and My Folders in the IBM Cognos pane that contain any reports or analyses that were cached.	Traverse
Perform full-text searches of content published to IBM Cognos Analytics. Folders without Traverse permission are not searched for content.	Traverse
View the information card.	Read

## Permissions for accessing IBM Cognos Connection

Access permissions are required to download reports from or to publish Microsoft Office documents to IBM Cognos Connection.

*Table 3. Cognos Connection permissions to download Office documents*

<b>Goal</b>	<b>Permissions</b>
Open reports from IBM Cognos Connection from a Microsoft Office application and save the reports locally.	Read
Publish a Microsoft Office document to IBM Cognos Connection.	Execute
Download reports from IBM Cognos Connection.	Read and Traverse





# Appendix A. Accessibility features

Accessibility features help users who have a disability, such as restricted mobility or limited vision, to use information technology products successfully.

## Accessibility features for the Installation wizard

The Installation wizard has accessibility features that help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products successfully.

The following list includes the major accessibility features in the Installation wizard:

- You can use accelerators and command keys to navigate through the Installation wizard.  
In Microsoft Windows, press the Alt key, then the accelerator to trigger an action; for example, ALT+S indicates that you press and hold the ALT key and then press the S key.
- The Installation wizard uses Microsoft Active Accessibility (MSAA). This means that people with limited vision can use screen-reader software, along with a digital speech synthesizer, to listen to what is displayed on the screen.

## Keyboard navigation in the Installation wizard

The following table lists the keyboard shortcuts that you can use to perform some of the main tasks in the Installation wizard on the Windows operating system. If you are using a screen reader, you may want to maximize your window so the keyboard shortcut tables in the following topics are completely expanded and accessible.

**Note:** The following keyboard shortcuts are based on U.S. standard keyboards. Some of the content in this topic may not be applicable to some languages.

Goal	Action
Move to the next field on a page.	TAB
Return to the previous field on a page.	SHIFT+TAB
Close the installation wizard.	ALT+F4
Move to the next configuration step.	ALT+N
Return to the previous configuration step.	ALT, B or, for Windows 7 systems and later, ALT, B, B
Move to the next selection in a list.	DOWN ARROW
Move to the previous selection in a list.	UP ARROW
Perform the action for the selected button, or select or clear the selected check box.	SPACEBAR

The following table lists the keyboard shortcuts that you can use to perform some of the main tasks in the **License Agreement** pages of the Installation wizard.

<i>Table 5. License Agreement keyboard shortcuts</i>	
<b>Goal</b>	<b>Action</b>
Accept the license agreement.	ALT+A
Decline the license agreement.	ALT+D
Close the Installation wizard when the license agreement has been declined.	ALT+X

## Vendor software

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The IBM Cognos for Microsoft Office components include certain vendor software that is not covered under the IBM license agreement. IBM makes no representation about the accessibility features of these products. Contact the vendor for the accessibility information about its products.

## IBM and accessibility

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See the IBM Human Ability and Accessibility Center for more information about the commitment that IBM has to accessibility.

<http://www.ibm.com/able> (opens in a new window)

## Appendix B. Rebranding Cognos Office Components

This section is intended for clients and partners who need to rebrand, customize, or localize labels, messages, or other strings in IBM Cognos Office products, such as IBM Planning Analytics for Microsoft Excel, IBM Cognos Office, and IBM Cognos for Microsoft Office.

### Resource Files

All the customizable strings for IBM Cognos Office products are in XML-based resource (.resx) files.

The .resx resource file format consists of XML entries that specify objects and strings inside XML tags. One advantage of a .resx file is that when opened with a text editor (such as Notepad) it can be written to, parsed, and manipulated. When viewing a .resx file, you can see the binary form of an embedded object, such as a picture when this binary information is a part of the resource manifest. Apart from this binary information, a .resx file is readable and maintainable.

A .resx file contains a standard set of header information that describes the format of the resource entries, and specifies the versioning information for the XML code that parses the data.

These files contain all the strings, labels, captions, and titles for all text in the three IBM Cognos Office components. For each language, there are three files, one for each component. The following table identifies each of the files.

Language	IBM Planning Analytics for Microsoft Excel files (internal name cor)	IBM Cognos for Microsoft Office files (internal name coc)	IBM Cognos Office files (internal name coi)
Language Neutral	cormsgs.resx	cocmsgs.resx	coimsgs.resx
Chinese (simplified)	cormsgs.zh-cn.resx	cocmsgs.zh-cn.resx	coimsgs.zh-cn.resx
Chinese (traditional)	cormsgs.zh-tw.resx	cocmsgs.zh-tw.resx	coimsgs.zh-tw.resx
Croatian	cormsgs.hr.resx	cocmsgs.hr.resx	coimsgs.hr.resx
Czech	cormsgs.cs.resx	cocmsgs.cs.resx	coimsgs.cs.resx
Danish	cormsgs.da.resx	cocmsgs.da.resx	coimsgs.da.resx
Dutch	cormsgs.nl.resx	cocmsgs.nl.resx	coimsgs.nl.resx
English	cormsgs.en.resx	cocmsgs.en.resx	coimsgs.en.resx
Finnish	cormsgs.fi.resx	cocmsgs.fi.resx	coimsgs.fi.resx
French	cormsgs.fr.resx	cocmsgs.fr.resx	coimsgs.fr.resx
German	cormsgs.de.resx	cocmsgs.de.resx	coimsgs.de.resx
Hungarian	cormsgs.hu.resx	cocmsgs.hu.resx	coimsgs.hu.resx
Italian	cormsgs.it.resx	cocmsgs.it.resx	coimsgs.it.resx

Table 6. IBM Cognos Office resource files (continued)

Language	IBM Planning Analytics for Microsoft Excel files (internal name cor)	IBM Cognos for Microsoft Office files (internal name coc)	IBM Cognos Office files (internal name coi)
Japanese	cormsgs.ja.resx	cocmsgsgs.ja.resx	coimsgsgs.ja.resx
Kazakh	cormsgs.kk.resx	cocmsgsgs.kk.resx	coimsgsgs.kk.resx
Korean	cormsgs.ko.resx	cocmsgsgs.ko.resx	coimsgsgs.ko.resx
Norwegian	cormsgs.no.resx	cocmsgsgs.no.resx	coimsgsgs.no.resx
Polish	cormsgs.pl.resx	cocmsgsgs.pl.resx	coimsgsgs.pl.resx
Portuguese	cormsgs.pt.resx	cocmsgsgs.pt.resx	coimsgsgs.pt.resx
Romanian	cormsgs.ro.resx	cocmsgsgs.ro.resx	coimsgsgs.ro.resx
Russian	cormsgs.ru.resx	cocmsgsgs.ru.resx	coimsgsgs.ru.resx
Slovenian	cormsgs.sl.resx	cocmsgsgs.sl.resx	coimsgsgs.sl.resx
Spanish	cormsgs.es.resx	cocmsgsgs.es.resx	coimsgsgs.es.resx
Swedish	cormsgs.sv.resx	cocmsgsgs.sv.resx	coimsgsgs.sv.resx
Thai	cormsgs.th.resx	cocmsgsgs.th.resx	coimsgsgs.th.resx
Turkish	cormsgs.tr.resx	cocmsgsgs.tr.resx	coimsgsgs.tr.resx

## Running Cognos Office components in English in a localized Microsoft Windows environment

You can display English in Cognos Office components in a Microsoft Windows environment that is configured to use another language.

### About this task

For example, if Microsoft Windows is set to use French, Cognos Office components also use French by default. But you can configure Cognos Office components to use English instead of French.

### Procedure

1. Close all Microsoft Office windows.
2. In Windows Explorer, navigate to the Cognos Office installation location.
  - Tip:** On Windows 7, the default installation location is C:\Program Files (x86)\IBM\cognos\Cognos for Microsoft Office.
3. Find the folder that corresponds to the locale you are using in Windows, for example, fr if you are using French in Microsoft Windows.
4. Move the folder to a location outside of the Cognos Office installation location.

## Example

For example, if your Region and Language settings in Windows are set to French (France), but you want to see English in IBM Planning Analytics for Microsoft Excel, move the `fr` folder outside of the Cognos for Microsoft Office folder. When you open IBM Planning Analytics for Microsoft Excel, or any other Cognos Office component, the user interface is in English.

## Rebranding or Localizing Cognos Office Components

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If you are setting the IBM Cognos component for a multilanguage environment, you must compile both the language-neutral file and the language file for your locale. The program detects the user locale settings in Windows and uses the appropriate language file.

For example, suppose you installed IBM Planning Analytics for Microsoft Excel and your locale is set to French (France). You must make changes to the language-neutral files: `cormsgs.resx` and `coimsgs.resx`, and to the French files: `cormsgs.fr.resx` and `coimsgs.fr.resx`.

To customize or localize the component names and text messages, follow these steps:

- Edit the language-neutral resource files, and if necessary, the language resource files for your locale.
- Download and then run the Resource File Generator (`Resgen.exe`) required for compiling the updated resource files.
- Test your work.

## Editing the resource (.resx) files

For each component, there exists a set of files that support the various languages. The country or region code distinguishes the filenames.

With the exception of the language-neutral set of files (`cormsgs.resx`, `cocmsgs.resx`, and `coimsgs.resx`) that serve as the default files, each file follows the following naming convention:

*componentcodemsgs.languagecode.resx*

You can change strings, not icon or graphic resources.

When changing text strings, consider the string length. The width of fields were created using the existing strings. Significantly increasing string length may result in some strings getting truncated in some of the dialog boxes.

The resource file contains metadata and comments that can help you determine when and where strings are used in the software.

**Important:** To edit XML resource files, use an XML editor. It is important to preserve the Unicode encoding and format, including white space. Simple text editors will likely corrupt the files. A validating XML editor ensures that the contents of the files are well formed and valid. Modify only string information. Do not change other information in the files.

## Procedure

1. Install the IBM Cognos Office components locally to a workstation.

This gives you access to the resource files.

2. Locate the resource files.

If you install locally and accept all the defaults, they are found in the following location:

```
[installation directory]\Program Files\IBM\cognos\Cognos for Microsoft Office\resources
```

3. In an XML Editor, open the *componentcodemsgs.languagecode.resx* file.

Use an editor such as Visual Studio or XMLSpy to change the branding details or to translate strings into another language.

If you are creating new language files, follow the naming convention by inserting the 2 or 5-character language code into the middle of the file name. For example, if you add a Romanian language file for IBM Cognos for Microsoft Office, you would save it as `cocmsgs.ro.resx`.

4. Save the file.
5. Repeat steps 3 and 4 for each component file associated with the language that you want to translate.

## Results

The updated resource files are now ready to be compiled.

## Compiling the updated resource files

Before you can deploy updated files, you must download the Resource File Generator (`Resgen.exe`). The Resource File Generator converts `.txt` files and `.resx` (XML-based resource format) files to common language runtime binary `.resources` files that you can embed in a runtime binary executable or compile into satellite assemblies.

The Resource File Generator is a Microsoft .NET Framework Software Development Kit (SDK) program that generates compiled resource files. The `resgen` executable is shipped with the Microsoft .NET SDK and comes with Microsoft Visual Studio development system. You must choose a version of the Resource File Generator that is compatible with the version of .NET Framework that is used by IBM Cognos Office components.

`Resgen.exe` performs the following conversions:

- Converts `.txt` files to `.resources` or `.resx` files.
- Converts `.resources` files to text or `.resx` files.
- Converts `.resx` files to text or `.resources` files.

## Procedure

1. Download the `resgen.exe` from the Microsoft .NET developer Web site.
2. After downloading the Resource File Generator, open a command prompt window.
3. Find the location where `Resgen` was downloaded.

For example, `cd C:\Program Files\Microsoft Visual Studio 8\v2.0\Bin`

4. To compile the resource files, from the command prompt, type

```
resgen /compile "[resx file location]\[file name.resx]"
```

For example, `resgen /compile`

```
"c:\ProgramFiles\Cognos\Cafe\resources\cormsgs.resx"
```

Resource files are automatically renamed to include the `.resource` extension in their file name.

5. Copy the resulting files to the `Resources` directory.

## Testing your work

To test your work, run IBM Cognos Office using a variety of locales and start each component (IBM Cognos Office, IBM Cognos for Microsoft Office, and IBM Planning Analytics for Microsoft Excel) to ensure that your changes are reflected in each area.

Check the text changes in all the interfaces exposed to your users. Pay particular attention to generic dialog boxes, which are easy to miss.

---

## Appendix C. Setting Up an Unattended Installation

Set up an unattended installation and configuration when you want to install an identical configuration across several computers on your network or to automate the installation process by specifying options and settings for users.

There are two ways to set up an unattended installation. Both methods use a transfer specification file (.ats) to copy IBM Cognos for Microsoft Office components to your computer without you being prompted for information.

One method allows you to run the installation wizard on your computer. The selections that you make are recorded in a transfer specification file (.ats). You can use the generated .ats file to perform an unattended installation across other computers on your network. Alternatively, you can use the default response.ats file to automate the installation. The installer uses the values in the response file rather than requiring you to interact with it.

Before you set up an unattended installation and configuration, ensure that all the system requirements and prerequisites are met and that all third-party products are installed and configured.

For more information, see [Chapter 3, “Installing IBM Cognos for Microsoft Office,” on page 7](#).

To set up an unattended installation and configuration:

- configure a transfer specification file (.ats) to specify installation options
- run the installation tool in silent mode

---

### Set up the installation using a file generated from the Installation wizard

By default, each time you install IBM Cognos Office components using the installation wizard, the options that you select are recorded in a transfer specification file. Therefore, if you already installed IBM Cognos Office components on a deployment computer, you can use the generated transfer specification file as a template for unattended installations on different computers. You can do this by starting the installer from the command line and passing the response file in as an argument.

You can check if the unattended installation was successful by checking the return status. A value of zero (0) indicates success and all other values indicate that an error occurred.

#### Procedure

1. Use the installation wizard to install the IBM Cognos Office component, such as IBM Cognos Analysis for Microsoft Excel or IBM Cognos for Microsoft Office, on your computer.
2. Go to [installation\_location]/instlog.
3. Locate the transfer specification file (.ats) that was generated:
  - If you installed IBM Cognos for Microsoft Office, the file name is `ts-COC-version-yyyyymmdd_hhmm.ats`.
  - If you installed IBM Cognos Analysis for Microsoft Excel, the file name is `ts-COR-version-yyyyymmdd_hhmm.ats`.
4. Copy the transfer specification file to the computer where you plan to install the IBM Cognos Office component.
5. On the computer where you plan to install the software, download and extract the installation package.
6. In a text editor, open the transfer specification file (.ats) that you copied.
7. In the section named License Agreement, change the **I AGREE=** property to y.

This action means that you are accepting the license agreement. To read the terms of the license agreement, see the *LA\_language\_code* and *notices* files in either of these locations:

- in the installation package - in the root installation directory for the operating system
  - on the computer from which you copied the *response.ats* file - in the *c10\_location\license\product* directory
8. Save the transfer specification file in the directory where you extracted the contents of the installation package, and in the same folder that contains the installer executable file, *issetup.exe*.
  9. Open a **Command Prompt** window, and then change to the directory in which the installer, *issetup.exe*, is located.
  10. Type the following command, where *location* is the file path location of the transfer specification file:  

```
issetup -s location/filename.ats
```

The progress of the installation appears in the Windows taskbar.

If zero (0) is not returned, check the log files for error messages. Errors are recorded in the installation directory in the following log file:

- For IBM Cognos for Microsoft Office, the file name is *tl-COC-version-yyyymmdd-hhmm\_summary-error.txt*.
- For IBM Cognos Analysis for Microsoft Excel, the file name is *tl-COR-version-yyyymmdd-hhmm\_summary-error.txt*.

If errors occur before sufficient initialization occurs, log messages are sent to one of the following log files in the Temp directory:

- For IBM Cognos for Microsoft Office, the file name is *tl-COC-version-yyyymmdd-hhmm.txt*.
- For IBM Cognos Analysis for Microsoft Excel, the file name is *tl-COR-version-yyyymmdd-hhmm.txt*.

## Set up the installation using the response.ats file

---

If you do not use the installation wizard to install components, you can use the default transfer specification file named *response.ats* that is available in the installation package. Use the *response.ats* file to copy IBM Cognos Office components to several computers without being prompted for information.

You must modify the *response.ats* file for your environment before you can use it for an unattended installation.

You can check if the unattended installation was successful by checking the return status. A value of zero (0) indicates success and all other values indicate that an error occurred.

### Procedure

1. On the target computer, download and extract the contents of the installation package.
2. In a text editor, go to the operating system directory in the file structure that you extracted and open the *response.ats* file.

Each section in the *response.ats* file corresponds to a dialog box in the installation wizard.

3. In the section named License Agreement, change the **I AGREE=** property to *y*.

This action means that you are accepting the license agreement. To read the terms of the license agreement, see the *LA\_language\_code* and *notices* files in the root installation directory for the operating system in the installation package.

4. In the **APPDIR=** *location*, type the installation location of the program files for the IBM Cognos for Microsoft Office component.

**Note:** Ensure that there are no spaces on either side of the equal sign (=).

5. For the **APPFOLDER=** property, type the name of the **Start** menu folder that contains your program shortcuts.



**Note:** To ensure that the shortcut folder is visible to all users, for the **ALLUSERS\_FLAG=** property, type 1.

6. In the section named **[Component List]**, next to each component:

- To install the component, type 1.
- To not install the component, type 0.

For example, COR\_APP=0 or COC\_APP=0.

7. In the **[Install Conditions]** section:

- To specify that the condition is true, type 1.
- To specify that the condition is false, type 0.

8. After you make the necessary changes, save the response.ats file to a local directory.

9. Open a **Command Prompt** window, and then change to the directory in which the installer, `issetup.exe`, is located.

10. Type the following command, where *location* is the file path location of the transfer specification file:  
`issetup -s location/response.ats`

The progress of the installation appears in the Windows taskbar.

If zero (0) is not returned, check the log files for error messages. Errors are recorded in the installation directory in the following log file:

- For IBM Cognos for Microsoft Office, the file name is `tl-COC-version-yyyyymmdd-hhmm_summary-error.txt`.
- For IBM Cognos Analysis for Microsoft Excel, the file name is `tl-COR-version-yyyyymmdd-hhmm_summary-error.txt`.

11. If errors occur before sufficient initialization occurs, log messages are sent to one of the following log files in the Temp directory:

- For IBM Cognos for Microsoft Office, the file name is `tl-COC-version-yyyyymmdd-hhmm.txt`.
- For IBM Cognos Analysis for Microsoft Excel, the file name is `tl-COR-version-yyyyymmdd-hhmm.txt`.



---

## Appendix D. Troubleshooting

Use this troubleshooting information as a resource to help you solve specific problems you may encounter during or after the installation of IBM Cognos for Microsoft Office components.

### Troubleshooting a problem

---

*Troubleshooting* is a systematic approach to solving a problem. The goal of troubleshooting is to determine why something does not work as expected and how to resolve the problem.

The first step in the troubleshooting process is to describe the problem completely. Problem descriptions help you and the IBM technical-support representative know where to start to find the cause of the problem. This step includes asking yourself basic questions:

- What are the symptoms of the problem?
- Where does the problem occur?
- When does the problem occur?
- Under which conditions does the problem occur?
- Can the problem be reproduced?

The answers to these questions typically lead to a good description of the problem, which can then lead you a problem resolution.

#### **What are the symptoms of the problem?**

When starting to describe a problem, the most obvious question is "What is the problem?" This question might seem straightforward; however, you can break it down into several more-focused questions that create a more descriptive picture of the problem. These questions can include:

- Who, or what, is reporting the problem?
- What are the error codes and messages?
- How does the system fail? For example, is it a loop, hang, crash, performance degradation, or incorrect result?

#### **Where does the problem occur?**

Determining where the problem originates is not always easy, but it is one of the most important steps in resolving a problem. Many layers of technology can exist between the reporting and failing components. Networks, disks, and drivers are only a few of the components to consider when you are investigating problems.

The following questions help you to focus on where the problem occurs to isolate the problem layer:

- Is the problem specific to one platform or operating system, or is it common across multiple platforms or operating systems?
- Is the current environment and configuration supported?

If one layer reports the problem, the problem does not necessarily originate in that layer. Part of identifying where a problem originates is understanding the environment in which it exists. Take some time to completely describe the problem environment, including the operating system and version, all corresponding software and versions, and hardware information. Confirm that you are running within an environment that is a supported configuration; many problems can be traced back to incompatible levels of software that are not intended to run together or have not been fully tested together.

## When does the problem occur?

Develop a detailed timeline of events leading up to a failure, especially for those problems or sequence events that are one-time occurrences. You can most easily develop a timeline by working backward: Start at the time an error was reported (as precisely as possible, even down to the millisecond), and work backward through the available logs and information. Typically, you need to look only as far as the first suspicious event that you find in a diagnostic log.

To develop a detailed timeline of events, answer these questions:

- Does the problem happen only at a certain time of day or night?
- How often does the problem happen?
- What sequence of events leads up to the time that the problem is reported?
- Does the problem happen after an environment change, such as upgrading or installing software or hardware?

Responding to these types of questions can give you a frame of reference in which to investigate the problem.

## Under which conditions does the problem occur?

Knowing which systems and applications are running at the time that a problem occurs is an important part of troubleshooting. These questions about your environment can help you to identify the root cause of the problem:

- Does the problem always occur when the same task is being performed?
- Does a certain sequence of events need to occur for the problem to surface?
- Do any other applications fail at the same time?

Answering these types of questions can help you explain the environment in which the problem occurs and correlate any dependencies. Remember that just because multiple problems might have occurred around the same time, the problems are not necessarily related.

## Can the problem be reproduced?

From a troubleshooting standpoint, the ideal problem is one that can be reproduced. Typically, when a problem can be reproduced you have a larger set of tools or procedures at your disposal to help you investigate. Consequently, problems that you can reproduce are often easier to debug and solve. However, problems that you can reproduce can have a disadvantage: If the problem is of significant business impact, you do not want it to recur. If possible, re-create the problem in a test or development environment, which typically offers you more flexibility and control during your investigation.

- Can the problem be re-created on a test system?
- Are multiple users or applications encountering the same type of problem?
- Can the problem be re-created by running a single command, a set of commands, or a particular application?

## Searching knowledge bases

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You can often find solutions to problems by searching IBM knowledge bases. You can optimize your results by using available resources, support tools, and search methods.

### About this task

You can find useful information by searching the information center for IBM Cognos for Microsoft Office, but sometimes you need to look beyond the information center to answer your questions or resolve problems.

## Procedure

To search knowledge bases for information that you need, use one or more of the following approaches:

- Find the content that you need by using the [IBM Support Portal](#)

The IBM Support Portal is a unified, centralized view of all technical support tools and information for all IBM systems, software, and services. The IBM Support Portal lets you access the IBM electronic support portfolio from one place. You can tailor the pages to focus on the information and resources that you need for problem prevention and faster problem resolution.

- Search for content about IBM Cognos for Microsoft Office at: [IBM Cognos forums and communities](#)
- Search for content by using the IBM masthead search.

You can use the IBM masthead search by typing your search string into the **Search** field at the top of any [ibm.com](#)® page.

- Search for content by using any external search engine, such as Google, Yahoo, or Bing.

If you use an external search engine, your results are more likely to include information that is outside the [ibm.com](#) domain. However, sometimes you can find useful problem-solving information about IBM products in newsgroups, forums, and blogs that are not on [ibm.com](#).

**Tip:** Include "IBM" and the name of the product in your search if you are looking for information about an IBM product.

## Getting fixes

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A product fix might be available to resolve your problem.

### Procedure

To find and install fixes:

1. Determine which fix you need ([Fix Central](#)).
2. Download the fix. Open the download document and follow the link in the "Download package" section.
3. Apply the fix. Follow the instructions in the "Installation Instructions" section of the download document.
4. Subscribe to receive weekly email notifications about fixes and other IBM Support information.

## Contacting IBM Support

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IBM Support provides assistance with product defects, answering FAQs, and performing rediscovery.

### Before you begin

After trying to find your answer or solution by using other self-help options such as technotes, you can contact IBM Support. Before contacting IBM Support, your company must have an active IBM maintenance contract, and you must be authorized to submit problems to IBM. You should also have the following information at hand:

- Your customer identification number
- Your service request number, if it is an ongoing service request
- The phone number where you can be reached
- The version of the software you use
- The version of the operating environment you use
- A description of what you were doing when the problem occurred
- The exact wording of any error messages that display
- Any steps you took to attempt to solve the problem

For information about the types of available support, see the [Support portfolio](#) topic in the *Software Support Handbook*.

## Procedure

Complete the following steps to contact IBM Support with a problem:

1. Define the problem, gather background information, and determine the severity of the problem. For more information, see the [Getting IBM support](#) topic in the *Software Support Handbook*.
2. Gather diagnostic information.
3. Submit the problem to IBM Support in one of the following ways:
  - Using IBM Support Assistant (ISA): Use this feature to open, update, and view an Electronic Service Request with IBM. Any data that has been collected can be attached to the service request. This expedites the analysis and reduces the time to resolution.
  - Online through the IBM Support Portal: You can open, update, and view all your Service Requests from the Service Request portlet on the Service Request page.
  - By phone: For the phone number to call in your region, see the [Directory of worldwide contacts web page](#).

## Results

If the problem that you submit is for a software defect or for missing or inaccurate documentation, IBM Support creates an Authorized Program Analysis Report (APAR). The APAR describes the problem in detail. Whenever possible, IBM Support provides a workaround that you can implement until the APAR is resolved and a fix is delivered. IBM publishes resolved APARs on the IBM Support website daily, so that other users who experience the same problem can benefit from the same resolution.

## Exchanging information with IBM

---

To diagnose or identify a problem, you might need to provide IBM Support with data and information from your system. In other cases, IBM Support might provide you with tools or utilities to use for problem determination.

## Sending information to IBM Support

To reduce the time that it takes to resolve your problem, you can send trace and diagnostic information to IBM Support.

### Procedure

To submit diagnostic information to IBM Support:

1. Open a problem management record (PMR). You can use the [IBM Support Assistant](#) or the [IBM Service Request tool](#).
2. Collect the diagnostic data that you need. Diagnostic data helps reduce the time that it takes to resolve your PMR. You can collect the diagnostic data manually or automatically:
3. Compress the files by using the ZIP or TAR format.
4. Transfer the files to IBM. You can use one of the following methods to transfer the files to IBM:
  - [The Service Request tool](#)
  - Standard data upload methods: FTP, HTTP
  - Secure data upload methods: FTPS, SFTP, HTTPS
  - Email

All of these data exchange methods are explained on the [IBM Support site](#).

## Receiving information from IBM Support

Occasionally an IBM technical-support representative might ask you to download diagnostic tools or other files. You can use FTP to download these files.

### Before you begin

Ensure that your IBM technical-support representative provided you with the preferred server to use for downloading the files and the exact directory and file names to access.

### Procedure

To download files from IBM Support:

1. Use FTP to connect to the site that your IBM technical-support representative provided and log in as anonymous. Use your email address as the password.
2. Change to the appropriate directory:
  - a) Change to the `/fromibm` directory.

```
cd fromibm
```

- b) Change to the directory that your IBM technical-support representative provided.

```
cd nameofdirectory
```

3. Enable binary mode for your session.

```
binary
```

4. Use the **get** command to download the file that your IBM technical-support representative specified.

```
get filename.extension
```

5. End your FTP session.

```
quit
```

## Subscribing to Support updates

---

To stay informed of important information about the IBM products that you use, you can subscribe to updates.

### About this task

By subscribing to receive updates, you can receive important technical information and updates for specific IBM Support tools and resources. You can subscribe to updates by using one of two approaches:

#### RSS feeds and social media subscriptions

The following RSS feed is available for IBM Cognos Analytics: [RSS feed for the IBM Support site](#)

#### My Notifications

With My Notifications, you can subscribe to Support updates for any IBM product. (My Notifications replaces My Support, which is a similar tool that you might have used in the past.) With My Notifications, you can specify that you want to receive daily or weekly email announcements. You can specify what type of information you want to receive (such as publications, hints and tips, product flashes (also known as alerts), downloads, and drivers). My Notifications enables you to customize and categorize the products about which you want to be informed and the delivery methods that best suit your needs.

### Procedure

To subscribe to Support updates:

1. Subscribe to the IBM Cognos Analytics RSS feeds.
2. To subscribe to My Notifications, go to the [IBM Support Portal](#) and click **My Notifications** in the **Notifications** portlet.
3. If you have already registered for My support, sign in and skip to the next step. If you have not registered, click **Register now**. Complete the registration form using your email address as your IBM ID and click **Submit**.
4. Click **Edit profile**.
5. Click **Add products** and choose a product category; for example, **Software**.
6. In the second list, select a product segment; for example, **Data & Information Management**.
7. In the third list, select a product subsegment, for example, **Databases**.
8. Select the products that you want to receive updates for.
9. Click **Add products**.
10. After selecting all products that are of interest to you, click **Subscribe to email** on the **Edit profile** tab.
11. Select **Please send these documents by weekly email**.
12. Update your email address as needed.
13. In the **Documents list**, select the product category; for example, **Software**.
14. Select the types of documents that you want to receive information for.
15. Click **Update**.

## Results

Until you modify your RSS feeds and My Notifications preferences, you receive notifications of updates that you have requested. You can modify your preferences when needed (for example, if you stop using one product and begin using another product).

## Common errors

---

This section lists the most-common errors that you might encounter.

### Configuration Issues

The following issues are related to configuration and setup.

#### The Cognos Office interface fails to initialize in Microsoft Office

IBM Cognos Office may not initialize when the Microsoft .NET Framework is not installed or the version is not correct. The required Microsoft .NET Framework version is 4.6.1 or later. Another possible reason for this condition is that the add-in is either not installed or not registered.

If you are running the wrong version of Microsoft .NET Framework, uninstall it and then reinstall Microsoft .NET Framework.

To install the IBM Cognos add-in, run the installation program.

Before you attempt to install Microsoft .NET Programmability Support, you must have installed Microsoft .NET Framework.

#### IBM Cognos for Microsoft Office Does Not Start in Microsoft Word

You open an IBM Cognos for Microsoft Office session in Microsoft Word, but nothing appears to happen.

This can occur if Microsoft Outlook has opened a session of Microsoft Word to edit email messages. To check whether you are using Word to edit email messages, in Microsoft Outlook, click **Tools, Options**,



**Mail Format.** In the **Message format** section of the dialog box, verify the options for editing your email messages.

To resolve this problem, close Microsoft Outlook before opening the Microsoft Word document configured for IBM Cognos for Microsoft Office.

## **Cognos for Microsoft Office Fails to Initialize**

If you use Internet Explorer to browse IBM Cognos Analytics and open a workbook, document, or presentation published by IBM Cognos for Microsoft Office, the document launches in Microsoft Office, but without full functionality.

To configure Internet Explorer to open Microsoft Office files in Microsoft Office instead of in Internet Explorer, you must use the Folder Options tool to update browse options. It is also possible to do this in Windows Registry.

### **Procedure**

1. Open **My Computer**.
2. From the **Tools** menu, click **Folder Options**.
3. On the **File Types** tab, under **Registered file types**, click **Microsoft Excel Worksheet**, and then click **Advanced**.

The **Edit File Type** dialog box appears.

4. Clear the **Browse in same window** check box and click **OK**.
5. Complete the same steps for Microsoft Office PowerPoint presentations and Microsoft Office Word documents.

## **bo:heap Buffer Overflow Error**

After long sessions, Microsoft Office may stop responding by generating a bo:heap Buffer Overflow error.

This error may be falsely identified as a potential virus by some virus-monitoring programs.

## **Microsoft Office does not open a Microsoft Office document published from Cognos Office**

If you observe Microsoft Office trying to open a published document twice when you double-click the workbook, document, or presentation from Microsoft Windows Explorer, the file association is either corrupted or not installed properly.

There are two options to resolve this issue. You can start the Microsoft Office application first, and then open the document using the **Open** command from the **File** menu, or you can reregister the file type.

### ***Reregistering file types with a Microsoft Office program***

When you are not able to open a Microsoft Office document even though it is associated with the correct file type, you must reregister the file type with the appropriate Microsoft Office program, such as Excel, Word, or PowerPoint.

### **About this task**

In these steps, program.exe is a placeholder for the executable file for the Microsoft Office program that you want to reregister. If you installed Microsoft Office to another location, use the path that is correct for that location.

**Note:** If you are using the command line on version 7 of Microsoft Windows operating system, you must elevate the rights of the command line to perform certain tasks, such as reregistering file types. To open

an elevated command prompt, or a command prompt in Administrator mode, right-click the command prompt shortcut, and select **Run as Administrator**.

## Procedure

1. From the **Start** menu, click **Run**.
2. To disassociate the program version, in the **Open** box, type the following command, and then click **OK**:

```
program.exe/regserver
```

3. To specify the default version, from the **Start** menu, click **Run**.
4. In the **Open** box, type the following command, and then click **OK**:

```
program.exe/regserver
```

## Unable to Open Published Microsoft Office Documents from Cognos Connection

If the browser does not prompt you to open or save the workbook, document, or presentation, it may mean that the option to prompt before opening was cleared. Reset this option.

You must enable the **File Download** and **Automatic prompting for file downloads** in Internet Explorer.

### *Confirming Opening of Documents*

The procedure to confirm opening of documents is as follows.

## Procedure

1. Start the **Windows Control Panel**.
2. Double-click **Folder Options**.
3. From the **File Types** tab, in the **Registered file types** list, click **Microsoft Excel Worksheet**, and then click **Advanced**.
4. Ensure that the **Confirm open after download** check box is selected and click **OK**.
5. Repeat steps 3 and 4 for other Microsoft Office documents that are supported in IBM Cognos Office, such as **Microsoft Office Excel Template**, **Microsoft PowerPoint Presentation**, **Microsoft Office PowerPoint Template**, **Microsoft Word Document**, and **Microsoft Office Word Template**.
6. Click **Close**.

### *Resetting Internet Security Options*

The procedure to reset internet security options is as follows.

## Procedure

1. Start **Internet Explorer**.
2. From the **Tools** menu, click **Internet Options**.
3. From the **Security** tab, click the Web content zone for which you are updating these options, and then click **Custom Level**.
4. Scroll down to the **Downloads** section and click **Enable** for the **File download** and **Automatic prompting for file downloads** options.
5. Click **OK** twice.

## Unable to import IBM Cognos Analytics reports

The request to import an IBM Cognos Analytics report fails.

The following message is displayed:

```
Field System.NetHttpWebResponse.result not found
```

To resolve this issue, when using single signon with Microsoft Internet Information Services (IIS), anonymous access must be enabled so that users can import IBM Cognos Business Intelligence content or reports.

IBM Cognos components run with two levels of logon: anonymous and authenticated. By default, anonymous access is enabled in IBM Cognos Configuration. If you choose to use authenticated logon only, your administrator can disable anonymous access and configure IBM Cognos Analytics to use an authentication provider, such as Active Directory. In this case, your administrator must configure the environment so that anonymous access is disabled and single signon is set up for the following virtual directories:

- cognos.cgi
- cognosisapi.dll

If Windows integrated authentication is enabled, you are not prompted to reenter authentication information when accessing IBM Cognos content that is secured by the Active Directory namespace.

If your administrator has configured an Active Directory namespace to support single signon with a Microsoft SQL Server or Microsoft Analysis Server data source, he or she must ensure that the IBM Cognos gateway is installed on an IIS Web server that is configured for Integrated Authentication on Microsoft Windows operating system.

For more information about setting single signon, see the *IBM Cognos Analytics Installation and Configuration Guide*.

The administrator must follow these steps using IBM Cognos Configuration to enable Anonymous Access in IIS. The administrator must also enable anonymous access for the IBM Cognos virtual directories: cognos.cgi and cognosisapi.dll.

## Procedure

1. On each computer where Content Manager is installed, start IBM Cognos Configuration.
2. In the **Explorer** window, under **Security, Authentication**, click **Cognos**.
3. In the **Properties** window, click the box next to the **Allow anonymous access** property and then click **True**.
4. From the **File** menu, click **Save**.

## .NET Messages are not in the Installed .NET Framework Language

When you install a non-English version of .NET Framework in a non-English operating system, you will notice that the error messages, .NET shortcut, and .NET Console are in English.

To solve this issue, you must apply the .NET Framework Language Pack for your language.

The subkey numbers relate to the language. For example, English, French, German, and Japanese are listed here: 1033=en-en, 1036=fr-fr, 1031=de-de, and 1041=ja. Refer to the Microsoft Support Site to obtain subkey numbers for other languages.

If you are missing the language pack subkeys, you must install the .NET language pack, which is available from the Microsoft support Web site.

## Workbook Closes Unexpectedly

If you install the COM add-in and your Microsoft Excel workbook name contains a square bracket, Excel stops responding or closes unexpectedly after opening.

To resolve this problem, rename the workbook so that it does not contain square brackets.

## Reports Unavailable in Cognos Connection Jobs after Using Save As Command in Cognos Report Studio

After opening a report in IBM Cognos Report Studio and saving a copy using the **Save As** command, you may find that if the report is included in a job, it is not available in the IBM Cognos Connection portal.

Do not use the **Save As** command in IBM Cognos Report Studio to save changes when a report is included in a job. Instead, make a copy of the report, make changes to the copy, and then copy the updated report to the IBM Cognos Connection portal. Use this method to overwrite the report in the job without breaking the report links.

## Unable to Correctly Display East Asian Characters

Your locale is set to one of the East Asian languages and odd characters or question marks appear in the user interface, dialog boxes, and menus.

IBM Cognos Office products support GB18030, which is a Chinese National Standard for encoding characters. To display Simplified Chinese characters properly on Microsoft Windows XP operating system or earlier, you must add GB18030 support for Microsoft Windows core fonts and then enable font linking.

To resolve this issue, after installing the language support for Simplified Chinese, ensure that you have linked the SimSun18030.ttc font collection to the following core fonts:

- Tahoma
- Arial
- Microsoft Sans Serif
- SimSun

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