IBM Cognos for Microsoft Office
Version 11.1.0

User Guide

IBM

Contents

Introduction

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

This document contains overview and step-by-step information for using IBM Cognos for Microsoft Office. It provides detailed information about using IBM Cognos for Microsoft Office inside Microsoft Excel, Microsoft PowerPoint, and Microsoft Word.

Audience

This guide assumes that you are familiar with IBM Cognos products, such as IBM Cognos Analytics, IBM Cognos Connection, IBM Cognos PowerPlay Studio, and Microsoft Office software such as Microsoft Excel, Microsoft Word, and Microsoft PowerPoint.

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). 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. For more information about the accessibility features in IBM Cognos for Microsoft Offce, see Appendix A, "Accessibility features," on page 113.

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.

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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 upgrading, see the IBM Cognos for Microsoft Office *Installation Guide*.

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

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.

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 Analysis 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

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

Enhancements to the refresh process

IBM Cognos for Microsoft Office includes enhancements to the refresh process, including related changes to the user interface.

Refreshing the formatting for all reports in a Microsoft Office document

You can now retrieve the most recent formatting changes for all of the imported reports in a Microsoft Office document through a single refresh process. In earlier releases, you were able to update the formatting changes for only one report or report element at a time. The new feature provides increased flexibility for refreshing your report content.

Enhancements to the user interface include the new option, **Refresh the data and report formatting**, available when you use the **Refresh all Data** command from the IBM Cognos toolbar.

For more information, see "Refreshing report data and formatting" on page 19.

Refreshing the report structure

You can now retrieve changes to the structure or specification of imported reports or workspaces from IBM Cognos Business Insight. This enhancement means that you can check for any additions or deletions of report elements or widgets that have occurred since you last imported a report or workspace. Any new report elements that were added to the authored report in any of the supported IBM Cognos studios become available for import. This feature allows you to refresh the report structure without reimporting the report.

For more information, see "Refreshing report structures" on page 20.

Adjustment to access permissions

The IBM Cognos Business Intelligence administrator sets access permissions for your organization's data, which specify the users who can have access to entries, such as reports, in IBM Cognos Connection. The administrator also specifies the actions a user can perform on the content.

The access permissions for IBM Cognos for Microsoft Office were adjusted to align with the access permissions set for entries, such as reports, analyses, agents, and packages, in IBM Cognos Connection. IBM Cognos Connection provides a single access point to all corporate data available in IBM Cognos software.

Depending on the type of access permission you were granted, reports are either enabled or disabled in the IBM Cognos source tree. The benefit of this adjustment is that you now have a similar experience when working in IBM Cognos for Microsoft Office as you would when controlling the way an entry behaves and is displayed in IBM Cognos Connection.

For more information, see Appendix C, "Access permissions and credentials," on page 127.

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 about the 64-bit installation, see the IBM Cognos for Microsoft Office *Installation Guide*.

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.

Changed features in version 10.1.1

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

Improved display of report content

IBM Cognos for Microsoft Office includes improvements to the way report content is displayed when imported from the IBM Cognos content store.

Support of PowerPoint version 2007 and 2010 row and column upper limits

Depending on your Microsoft PowerPoint version, there are different maximum numbers of rows and columns in a table that you can import to your presentation slide. IBM Cognos for Microsoft Office now supports the 75 rows and 75 columns maximum limits in PowerPoint version 2007 and 2010. Report authors can now consider the additional number of rows and columns when designing reports for IBM Cognos for Microsoft Office in the various studios.

While you can import additional content to the presentation slide, consider the effect on your audience when designing the layout of your presentation. Report content in tables that exceeds the new upper limits is truncated.

Support of reports with integrated statistical information

You can now import reports that integrate IBM Cognos Statistics. IBM Cognos Statistics, powered by IBM SPSS®, provides analysts with the ability to distribute reports containing fact-based statistical information. IBM Cognos Statistics introduces new functionality to IBM Cognos Report Studio in which report authors can design reports that provide insight into key business variables or predict future outcomes. Statistical functionality is handled in a form similar to the Report Studio objects, which can be used to assemble reports. IBM Cognos for Microsoft Office users can now import these statistical objects into the Microsoft Office document.

For more information, see "Importing rich text elements and statistical information" on page 33.

Support of rich text items extended to include tables and images

In addition to text and images, report authors can add rich text items to the report layout. A rich text item is used to render HTML in the layout. This report object is similar to the HTML item, except that rich text items also render in PDF output. Report users use the rich text items when they want to add annotations defined in a data source to a report.

In this release, support has been extended to include tables and images in rich text items that are imported into a Microsoft Office document. A rich text element, including its sub-elements, is imported as a discrete report object, but each subelement is displayed on a document, in sequential order.

For more information, see "Importing rich text elements and statistical information" on page 33.

Dashboards are now workspaces

In IBM Cognos for Microsoft Office, the term dashboard is replaced by the term workspace to describe the import of a web page that contains widgets that graphically represent business data.

Enhanced user interface when importing workspace content

You are now able to select and import content in report widgets that were added to workspaces in IBM Cognos Workspace. Report widgets contain report objects. Objects in a report include both full reports and the individual report parts, such as tables (lists and crosstabs) and charts. Report objects include reports created in IBM Cognos Report Studio, IBM Cognos Query Studio, IBM Cognos Analysis Studio, and IBM Cognos Metric Studio.

In earlier versions, the individual parts of the report widget were not visible or selectable, and a report widget was imported as a discrete element. You can now select the report or individual report parts of a report widget from the Import wizard or the **Manage Data** tab in the IBM Cognos pane.

For more information, see "Importing workspace content" on page 32.

Improved handling of rows in Microsoft Excel

In earlier versions, when a list or crosstab was refreshed and the number of rows increased, the new range of cells was added at the beginning of the list or crosstab. Conversely, if the number of rows decreased, the cells were cleared but not deleted. Changes to the size of the list or crosstab displaced any formatting styles that were applied by the report author.

In this release, when a list or crosstab is refreshed and the number of rows is increased, the new range of cells is appended to the end of the list or crosstab; the range inherits the formatting style of the last row. If the number of rows is decreased, the range of empty cells is removed.

For more information, see "Refreshing report data and formatting" on page 19.

Improved usability of reports with prompts

Improvements were made to the way prompt values are managed.

The management of report prompt values was improved in the following areas:

• Use Value and Display Value

After refreshing a report or importing additional report elements, you can change the associated prompt values. In earlier versions, when the Use Value changed, the Display Value was not updated to reflect the change. You can now synchronize the Use Value and Display Value so that the Display Value is updated to match the new Use Value.

The new **Prompt Update Method** property was added so that you can specify how to update the Display Value when the Use Value is modified.

For more information, see "Synchronizing the Use Value and Display Value properties" on page 45.

• Special Prompt Values

Prompt values are usually text strings or numbers corresponding to data in the dimension that you want to filter. IBM Cognos for Microsoft Office now efficiently handles cases in which the prompt value is null or a blank space, or in which no value was selected.

For more information, see "Changing prompt values " on page 43.

• Custom Property type

You can now use the Custom Property type to assign multiple values to a single prompt. This is useful in cases in which several reports that are filtered by the same type of prompt are imported to a Microsoft Office document. All the prompt values for the single prompt name can now be viewed from the Custom Property on the **Manage Data** tab in the IBM Cognos pane.

For more information, see "Prompt values" on page 42.

- Sorted prompts

  You can now view the list of report prompts on the **Manage Data** tab in an organized way. Prompts are sorted by prompt type in the following sort order:

  – Specified Value

  – Cell Value

  – Always Prompt

  – Custom Property

  For easier viewing and selection, prompts are sorted first by type and then alphabetically by name within the type groups.

New features in version 10.1.0

The information later in this section lists features that were new in version 10.1.0. Links to directly related topics are included.

Support for standards for Section 508 of the U. S. Federal Rehabilitation Act

The product supports features for vision impaired users, for users with mobility impairments or limited hand use, for deaf and hard of hearing users, and for cognitively impaired users.

Some of the major accessibility features in IBM Cognos for Microsoft Office include:

- 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.

- Support for your system's display settings, such as color scheme, font size, and high-contrast display.

Importing reports or report elements from dashboards

You can import dashboard content that was created in IBM Cognos Business Insight into any of the supported Microsoft Office applications. The IBM Cognos Business Insight uses pre-authored content derived from the Cognos Analytics content store, IBM Cognos Metrics, and external data sources. Dashboard content includes composite reports and report parts, such as lists, crosstabs, and charts, that provide visibility into key performance indicators (KPIs).

By consuming these dashboards in IBM Cognos for Microsoft Office, you can organize and present information in a way that is easy to read and interpret.

For more information, see "Importing workspace content" on page 32.

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

Viewing business cards

When selecting a report, report element, or dashboard from the Browse Content pane, you can now choose to show or hide its associated business card. Business Cards contain a thumbnail-sized image of the selected report, report element, or dashboard content, including the following information: owner, contact, date when the report was last modified, location, and description.

Thumbnails allow you to preview the items before importing them into the worksheet, document, or slide. Thumbnails are also displayed in the **Import Content** wizard to facilitate the import process.

The **Options** dialog box now includes a new **Show Business Cards** check box on the **IBM Cognos BI** pane so that you can choose to show or hide business cards.

For more information, see "Viewing information cards" on page 25.

Chapter 2. Using IBM Cognos for Microsoft Office with other IBM Cognos products

You can use IBM Cognos for Microsoft Office with other products, such as IBM Cognos Analytics, IBM Cognos Workspace, and IBM Cognos Statistics. The integration of these products makes it possible to share useful data across the organization, connecting the business strategy with business execution.

When you view or import a report from Cognos Connection, you are viewing and manipulating data stored in the databases of your organization. The following diagram explains the high-level flow of processes involved in using IBM Cognos Analytics.
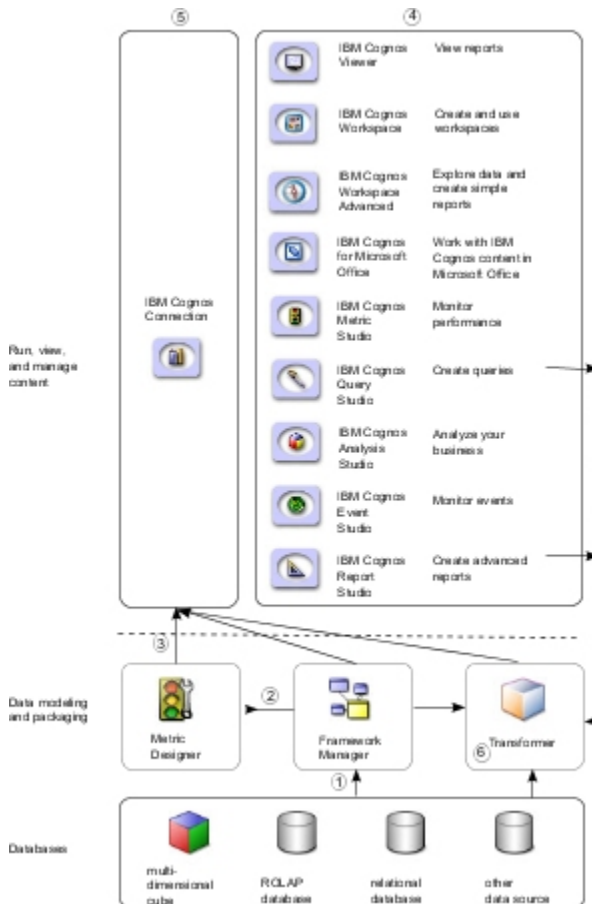
Figure 1. Process flow in IBM Cognos Analytics

1. In IBM Cognos Framework Manager, the modeler ensures that metadata is presented in a manner that business users can understand. Modelers import the metadata from one or more databases, and then add to the model to meet user requirements.

2. In IBM Cognos Metric Designer, the modeler identifies the data items and calculations that form the targets and actual results for each metric.

3. The modeler then publishes and updates packages to IBM Cognos Connection so that authors can use them to create reports, agents, and scorecards.

4. Business users and report authors use the published packages to understand their business data.

5. Users run, view, and manage their content in IBM Cognos Connection. Depending on their security permissions, they may be able to run and view reports or manage schedules, portal layout, and other user permissions.

6. In IBM Cognos Transformer, users can use queries in published packages, queries from IBM Cognos Analytics reports, and personal data sources, such as Microsoft Excel spreadsheet software, to create a unique, focused model of your business. Transformer is the leading OLAP modeling tool in the IBM Cognos industry, and it is designed so that business users can be self-sufficient in modeling a view of the business that suits the needs of their department or specialty.

Communicating business information

As a business user, you can explore Cognos Analytics modeled report data from within Microsoft Excel, PowerPoint, or Word, augmenting it with additional data, formatting styles, and layout.

How business intelligence information is used

Executives, managers, or advanced business users can use the IBM Cognos Analytics products to perform self-service reporting and publishing, self-service assembly or mashup, ad hoc reporting, and descriptive statistics. By using the products together, analysts can also perform advanced analysis through what-if scenarios and scenario-modeling and testing.

Report consumers can import dashboards that were built using IBM content in the Web-based tool, IBM Cognos Workspace, into a Microsoft PowerPoint presentation. From there, they can add dialogue and key points, and then refresh data on quarterly basis without having to rebuild the entire presentation deck.

In IBM Cognos for Microsoft Office, spreadsheet and presentation-based forms can be combined with extracted or rekeyed business intelligence data with other informal and qualitative information, such as management board books or customer portfolios, that is not easily represented in the IBM Cognos content store. Sales administrators compile monthly forecasts, finance managers build intricate spreadsheets to consolidate sales figures from different locations, and product managers pull sales and inventory figures from several data sources to get a more accurate view of product profitability.

Users are often required to make PowerPoint presentations within their organization, presentations that include Cognos Analytics content. This content often changes, such as in dashboards, and weekly or quarterly reports. Users are able to import content into a Microsoft Office application using IBM Cognos for Microsoft Office. They can also refresh the content without leaving the Office environment. After importing, data can be analyzed for key areas, such as customer turnover, inventory shortages, cross-selling challenges, regulatory compliance, and other key performance indicators.

Business analysts can also use IBM Cognos for Microsoft Office to pull Cognos Analytics content or dashboard content from IBM Cognos Workspace that is used in briefing books or annual reports. They can create these reports in Microsoft Word documents, which are sent to publishers for appropriate formatting and layout.

The business intelligence data from IBM Cognos Analytics provides insight into the operations of an organization. When users import reports or report objects from various packages, information is synthesized from multiple sources.

Required components for seamless integration

To ensure seamless integration and effective use of IBM Cognos for Microsoft Office and IBM Cognos Analytics, you must install IBM Cognos for Microsoft Office.

Your administrator must perform the following tasks:

- Install the IBM Cognos Analytics server.

  IBM Cognos Workspace is included with the IBM Cognos Analytics server. Your administrator is not required to install a separate package for IBM Cognos Workspace, but some tasks are required, including configuring access to the secured functions and features.

  For more information, see the installation guide for the specific product.

- Create a package in Framework Manager and publish it to a location in the IBM Cognos Connection portal to which you have access

For more information, see the *IBM Cognos Framework Manager User Guide*.

- In IBM Cognos Analytics, grant execute permissions for secured functions to specified namespaces, users, groups, or roles.

  For more information, see the *IBM Cognos Analytics Administration and Security Guide*.

Integrating with other IBM Cognos products

By using IBM Cognos for Microsoft Office, IBM Cognos content is imported into a Microsoft Office application. A high-level process is used as a guideline to ensure that the product is able to retrieve pre-authored reports, including metadata, from the IBM Cognos Analytics report servers.

About this task

The following is the process flow for how IBM Cognos for Microsoft Office integrates with other IBM Cognos products:

1. Reports, scorecards, analysis, workspaces, and more are created in the business intelligence studios of IBM Cognos Analytics. Which studio is used depends on the content, lifespan, and audience of the report, and whether the data is modeled dimensionally or relationally.

   In IBM Cognos Report Studio, reports and scorecards are prepared for a wider audience, published to IBM Cognos Connection or another portal, and scheduled there for bursting, distribution, and so on. Report Studio is also used to prepare templates for self-service reporting.

   Content is published to the IBM Cognos portal.

2. IBM Cognos Workspace delivers dynamic and customizable features that allow users to quickly and easily assemble interactive workspaces using IBM Cognos content, including external data sources.

   The workspace provides the layout interface for adding content to the workspace. A workspace is a collection of interactive widgets that contain content.

   Workspaces or report widgets are imported into IBM Cognos for Microsoft Office.

3. Import studio reports and dashboard content from IBM Cognos Analytics.

   You can use predefined reports or the report author can create new content for you using IBM Cognos Report Studio, IBM Cognos Query Studio, IBM Cognos PowerPlay Studio, or IBM Cognos Workspace Advanced.

   By using the supported Microsoft Office applications, you can continue to modify reports that reflect your own requirements. These reports can be published and shared with other users to extend their value.

   By importing workspace content from IBM Cognos Workspace into IBM Cognos for Microsoft Office, you can build a workbook or presentation by importing different report objects assembled on the workspace, refreshing the content, and then saving and printing the Microsoft document.

   Note: You cannot import a workspace if the workspace includes an Active Report. To allow the use of the workspace in IBM Cognos for Microsoft Office, the IBM Cognos Analytics report author can save the Active Report as a report view.

   You might have line-of-business managers who obtain performance reports and analysis and who also require revisions and alternative views of those reports.

4. From IBM Cognos for Microsoft Office, you can link to other IBM Cognos Analytics interfaces, such as the IBM Cognos Viewer and IBM Cognos Connection, that allow you to manage the revised content in the different studios.

   From IBM Cognos Viewer, you can link to IBM Cognos Connection where you can open a report that was published from a Microsoft Office application in IBM Cognos Report Studio or IBM Cognos Analysis Studio.

Chapter 3. IBM Cognos for Microsoft Office

IBM Cognos Office provides the framework that leverages the business intelligence architecture, including security, metadata, and content storage. This infrastructure helps you manage your Microsoft Office documents and monitor the financial performance of your organization.

Use the applications of IBM Cognos Office to create, view, and consume reports, analyses, and other business intelligence content using familiar Microsoft Office applications, such as Excel, PowerPoint, and Word.

The following table highlights the IBM Cognos Office integration of applications such as IBM Cognos for Microsoft Office and IBM Cognos Analysis for Microsoft Excel.

Table 1. IBM Cognos Office integration options	
Applications	**Description**
IBM Cognos for Microsoft Office	Importing IBM Cognos Analytics report content, including data, metadata, headers, footers, and charts, into a familiar Microsoft Office application. IBM Cognos for Microsoft Office uses the functionality in the Microsoft Office application to work with pre-authored reports or create new reports in the Cognos Analytics studios. It is especially useful for creating briefing books and presentations. Sales managers or project managers may use this application to retrieve and report on that information.
IBM Cognos Analysis for Microsoft Excel	Building sophisticated multiple-sheet, multiple-query reports in Excel using different kinds of data sources, and analyzing and exploring IBM Cognos dimensionally modeled data. The application provides formula-based data access so that users can solve business problems and present key results in a format that is most convenient to them. Data modelers, business analysts, and financial analysts who analyze enterprise data may use this application to identify trends, opportunities, problems, or project characteristics.

The user interface for IBM Cognos for Microsoft Office

The IBM Cognos for Microsoft Office window consists of the IBM Cognos for Microsoft Office pane, and three areas from which you can complete various tasks.

Cognos Office adds a custom toolbar to each of the supported Microsoft Office applications. When you click the IBM Cognos button on the toolbar, the IBM Cognos for Microsoft Office commands become available as buttons on the toolbar or ribbon of your Microsoft Office application.
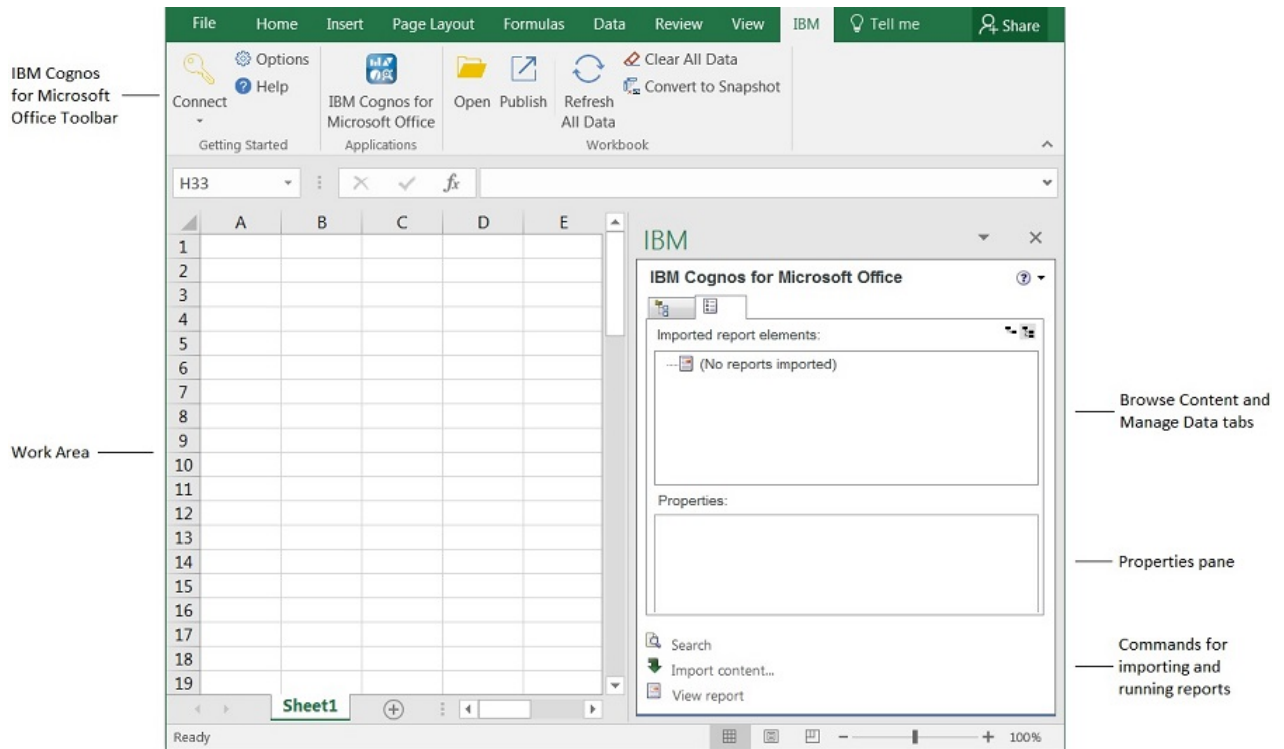
Figure 2. IBM Cognos for Microsoft Office user interface

IBM Cognos for Microsoft pane

The IBM Cognos for Microsoft pane keeps the most common IBM Cognos for Microsoft Office commands accessible from a central location in your Microsoft Office application.

The IBM Cognos for Microsoft Office pane contains reports and report objects that you can import into a Microsoft Office application.

The IBM Cognos for Microsoft Office pane contains these tabs:

- the **Browse Content** tab

  Contains the list of IBM Cognos Analytics servers and the report content in each data source.

  You can view a business card for each report or report element. The business card contains a thumbnail-sized image of the report or element and report information such as owner, contact, modification date, location, and description. For more information, see "Viewing information cards" on page 25.

- the **Manage Data** tab

  Contains reports or report elements that were imported from the IBM Cognos Analytics servers, such as crosstabs, lists, or charts, and their associated properties.

- the **Properties** pane on the Manage Data tab

  Shows a detailed view of the report objects. For some objects, you can specify a value for the property.

  You can use the Properties pane to make several changes and apply them at the same time instead of running different commands. For example, you can

  – change the name of an imported report
  – define the address of the IBM Cognos Analytics gateway
  – specify the default values of a prompted report
  – specify which report version output to run

The result of running a particular command, such as Refresh All Data, varies based on the values specified in the **Properties** pane.

For more information, see "View or run report output versions" on page 48.

Getting started with IBM Cognos Office

To use IBM Cognos Office with the Microsoft Office applications, you must customize your IBM Cognos Office environment. Regardless of the IBM Cognos Office application that you are using, you can perform the following common tasks from the IBM Cognos Office interface or the IBM Cognos Connection portal:

- Show or hide IBM Cognos Office "Starting IBM Cognos Office" on page 13.
- Set preferences for IBM Cognos Office "Customize IBM Cognos Office" on page 14.
- Set preferences for IBM Cognos for Microsoft Office "Customizing IBM Cognos for Microsoft Office" on page 25.
- Log on to IBM Cognos Analytics servers "Logging on to an IBM Cognos server" on page 16.
- Refresh data from the IBM Cognos Analytics content store"Refreshing report data and formatting" on page 19
- Clear data from the Microsoft Office document "Clearing cells of content" on page 21.
- Convert dynamic data to static data "Convert dynamic data to static data" on page 22.
- Publish a Microsoft Office document "Publishing a Microsoft Office document to IBM Cognos Connection" on page 22.
- Open and save a report locally "Opening and saving a report locally from IBM Cognos Connection" on page 23.
- Download a Microsoft Office document from IBM Cognos Connection "Downloading a Microsoft Office document from IBM Cognos Connection" on page 23.

Starting IBM Cognos Office

When you first open one of the supported Microsoft Office applications, an IBM Cognos Office toolbar appears. To view the commands and icons that you need to work in the IBM Cognos Office environment, you must make the IBM Cognos pane and the IBM Cognos Office toolbar available.

When the IBM Cognos Office toolbar is available, you can set your preferences , define the IBM Cognos Analytics gateway addresses of the data sources, and log on to an IBM Cognos Business Intelligence server.

After starting IBM Cognos Office, you may decide to resume work on non-IBM Cognos Office workbooks or documents, and want to show only the commands and buttons that you use. You can hide the IBM Cognos toolbar or the IBM Cognos action pane in your work area.

Procedure

1. On the IBM Cognos Office ribbon, click the **IBM Cognos** icon .

   If the IBM Cognos ribbon is not available or the **IBM Cognos** icon does not appear on the ribbon, see "The Cognos Office interface fails to initialize in Microsoft Office " on page 90.
2. From the **Tools** menu, click **Customize**.
3. On the **Toolbars** tab, choose whether to show or hide the IBM Cognos pane or the IBM Cognos toolbar:
   - To show or hide the IBM Cognos pane, select or clear the **IBM Cognos** check box.
   - To show or hide the IBM Cognos toolbar, select or clear the **IBM Cognos for Microsoft Office** check box.

Results

The IBM Cognos pane appears in the application work area, and buttons are made available from the IBM Cognos toolbar. You can now set your preferences for IBM Cognos Office and installed applications.

Customize IBM Cognos Office

You can customize the IBM Cognos Office environment so that it meets your reporting and analysis needs.

You can specify the following preferences for IBM Cognos Office:

- the application, such as IBM Cognos for Microsoft Office or IBM Cognos Analysis for Microsoft Excel, to start up when you first open IBM Cognos Office "Customizing how IBM Cognos Office starts" on page 14.
- the location of IBM Cognos Analytics gateways "Configure a connection to an IBM Cognos Analytics system" on page 14.
- whether to enable single signon for authentication "Setting up forms-based user authentication" on page 15.
- whether to enable forms-based authentication "Setting up forms-based user authentication" on page 15.
- whether to enable logging and at what level of detail "Enabling logging as a diagnostic tool" on page 16.

Each time that you start the IBM Cognos Office application, these settings apply to your session.

Customizing how IBM Cognos Office starts

When you first start IBM Cognos Office, you can choose to show either the **IBM Cognos** pane or a specific application. If you choose the **IBM Cognos** pane, it shows all the installed IBM Cognos for Office applications that you can use. You can move the pane or undock it. Click the application icon that best meets your needs.

After specifying your preference, IBM Cognos opens in the chosen mode in subsequent sessions.

Procedure

1. On the IBM Cognos toolbar, click the **Options** icon ⚙.
2. In the navigation pane, click **IBM Cognos**.
3. Choose whether to show the **IBM Cognos Welcome** pane in your work area or start a specific application, such as IBM Cognos for Microsoft Office or IBM Cognos Analysis for Microsoft Excel:

   - To show the **IBM Cognos Welcome** pane each time that you start IBM Cognos Office, under **Start Application**, select the **Show IBM Cognos welcome page** check box.

     You can change this option later by clearing the **Show this page in the future** check box on the **IBM Cognos** pane.
   - To start a specific application when opening IBM Cognos Office, from the **Startup application** list, click the application that you want.
4. Click **OK**.

Configure a connection to an IBM Cognos Analytics system

Before you access IBM Cognos content, you must configure connections to IBM Cognos Analytics systems. You can modify existing system information if your environment changes.

A connection to an IBM Cognos Analytics system provides access to relational, OLAP, and dimensionally-modeled relational (DMR) data sources. Also, with a connection to an IBM Cognos Analytics system, you can open a report from IBM Cognos Connection and publish a Microsoft Office document to IBM Cognos Connection.

Before you begin

Contact your administrator for the URLs required to connect to IBM Cognos Analytics systems (also known as IBM Cognos Analytics system) . Each URL is unique based on the system configuration, such as protocol, gateway type, and port number, selected by the administrator.

An example URL for an IBM Cognos Analytics system is: http://*server_name*/ibmcognos/bi/v1/disp

server_name is either the IP address of the computer or the computer name.

Procedure

1. On the IBM Cognos toolbar, click the **Options** icon ⚙.
2. In the navigation pane, click **IBM Cognos**.
3. Create a new connection or edit an existing connection.

   - To create a new connection, click **Add**.
   - To modify an existing connection, select the connection and then click **Edit**.

4. In the **Datasource Type** box, click **IBM Cognos BI**.
5. In the **System URL** box, type the URL provided by your administrator that identifies the location of the IBM Cognos system.

   Do not use localhost to refer to the local computer that the IBM Cognos Analytics gateway is running on. By using localhost, the information sent to the server is routed back to the local computer. As a result, requests to the report server will fail when importing prompted reports.

6. In the **Friendly Name** box, type a name.
7. Click **Test Connection**.

   If the connection fails, contact your administrator to verify the connection information. See the troubleshooting section for solutions to common configuration issues.

8. Click **Save**.
9. If you modified an existing connection, you must change the server and package information for each workbook.

   For more information, see "Updating Connection URLs" on page 17.

Results

The connection appears in the **IBM Cognos Systems** list.

The friendly name appears in the IBM Cognos pane as the root node in the tree hierarchy.

After you configure connections to the IBM Cognos Analytics systems, you can enable single signon for seamless integration between IBM Cognos Office and IBM Cognos client applications, such as IBM Cognos Planning or IBM Cognos Controller, or between IBM Cognos Office applications. You can also enable forms-based authentication.

Setting up forms-based user authentication

Forms-based authentication is not supported for connections to IBM Planning Analytics servers, it is only supported for connections to IBM Cognos Analytics servers.

If your company uses Web-based access management software, such as SiteMinder, to provide single signon in your security infrastructure, you must enable forms-based authentication. The forms-based authentication service allows you to enter your credentials, such as your user name and password, through a form on a Web page. If the credentials are valid, you are logged on to the site. The credentials persist until you explicitly log off.

Procedure

1. On the IBM Planning Analytics tab, click **Options** ⚙.
2. In the navigation pane, click **IBM**.
3. Under **Authentication**, select the **Enable forms based authentication** check box.
4. Click **OK**.

Enabling logging as a diagnostic tool

A log file is an important diagnostic tool for investigating the behavior of applications. It can help you troubleshoot problems by recording information about the environment, exceptions, and entry and exit functions.

You can specify whether information is logged and at what level of detail. By default, log activities are saved to the *user_root_directory*.

Enable logging if you are attempting to troubleshoot unexpected behavior. In this situation, the support staff will want a copy of the entries in the log file.

Writing to log files may result in performance degradation.

Procedure

1. On the IBM Planning Analytics tab, click **Options** ⚙.
2. In the navigation pane, click **IBM**.
3. Under **Logging**, select the **Log level**.

   - To turn logging off completely, click **None**.
   - To record only critical issues and events in the log, click **Critical**.
   - To record errors as well as critical issues and events, click **Error**.
   - To record warnings as well as errors and critical issues and events, click **Warning**.
   - To record information as well as warnings, errors, and critical issues and events, click **Information**.
   - To record all events and issues, even routine items, click **All**.
4. Click **OK**.

   The log file is created in `%APPDATA%\Local\Cognos\Office Connection\Logs`.

   The naming format for log files is *yymmdd_hhmmss*`.txt`.

Results

The next time that you start the application, activities and information about the environment are logged in the file. From the **Options** dialog box, click the **View logs** button to open the folder that contains the log files.

Logging on to an IBM Cognos server

IBM Cognos supports authenticated and anonymous user access. To use IBM Cognos Office as an authenticated user, you must log on to the IBM Cognos system that contains the data source or package for the reports that you want to import.

You can be logged on to multiple data source servers at one time.

You can also automate this task by using the Logon method. For more information, see .

Procedure

1. On the IBM Cognos toolbar, click the **Logon** icon , and select the server that contains the data source or package you want to use.
2. If there is more than one namespace, in the **Namespace** box, click the desired namespace and click **OK**.
3. Type your **User Name** and **Password**, and click **Logon**.

   The **Select Package** dialog box is displayed.
4. Select a data source or package, and then click **OK**.

Results

The IBM Cognos pane displays the data source or package.

Updating Connection URLs

If the URL of an IBM system changes, you can edit the information to use the new URL.

Editing the URL updates the saved connection for the IBM Planning Analytics for Microsoft Excel application, but not the connections for the reports in the workbook. To update the connections for Exploration Views or Quick Reports in an open workbook, use the Update connection utility. For more information, see *Update connections using the Update connection utility*.

About this task

When running this command, the name of the data source or package remains the same. You can use this command to change only one server, such as a test server to another server, such as a production server. You choose the URLs from the list of systems that you enter in the IBM **connections** section of the **Options** dialog box.

Procedure

1. Open the file you want to update.
2. On the **IBM Planning Analytics** tab, click **Options** .

   The **Options** dialog box is displayed.
3. In the navigation pane, click **IBM**.
4. Select the system you want to update and click **Edit**.
5. Select the Datasource type.
6. Type the new **Connection URL** in the field.
7. Update the Friendly name field as required.
8. Test the connection and click save.
9. Click **OK**.

Results

The open **IBM** enabled files are searched and the server information is updated.

Chapter 4. Working with Microsoft Office documents

You can make changes to your reports or explorations by retrieving data and overriding any previous changes, removing data, or converting dynamic data to static data to prevent future updates from the IBM Cognos Analytics server.

Regardless of the IBM Cognos Office application that you are using, you can perform the following actions on reports, explorations, or analyses:

- refresh data
- clear cells of contents
- convert dynamic data to static data

Refreshing report data and formatting

If the source data that a report is using changes, you can refresh it to ensure that you are working with the latest version. When you refresh a report or a report element, you are retrieving the latest changes and updates from the IBM Cognos Analytics content store.

There are two ways in which you can update your report content:

- Refresh all the reports in a document

  Retrieve the latest changes for all the imported reports in the Microsoft Office document by using the

  Refresh all Data button ⟳ on the IBM Cognos toolbar.
- Refresh a specific report, report element, widget, or workspace

  Retrieve the latest changes for a report, report element, or widget by using the **Refresh Data** command from the pop-up menu, available from the **IBM Cognos** pane, on the **Manage Data** tab.

In Microsoft Excel, all worksheets in the workbook are updated with the most recent data. These updates include any imported reports, regardless of the application used. In Microsoft Word, IBM Cognos content on all pages of a document are updated. In Microsoft PowerPoint, IBM Cognos content on all slides of a presentation are updated.

Whether you are refreshing multiple reports in a document or a single report element, you can choose the scope of your updates. For example, you can refresh only the source data or the source data and report formatting:

- refresh only the source data

  Retrieve the latest changes to the source data for all reports in the document or a report element. Any formatting changes applied from the Microsoft Office application remain unchanged.

  You can also automate this task by using the RefreshAllData method. For more information, see .
- refresh all data and formatting

  Retrieve the latest changes to the source data and formatting characteristics, such as cell color and number formatting, as designed by the report author. Any customized formatting in the Microsoft Office document is changed or overwritten by the current report formatting.

  You can also automate this task by using the RefreshAllDataAndFormat method. For more information, see .

In Microsoft PowerPoint, certain formatting changes are applied when you refresh only the source data, as summarized in the following table.

Table 2. PowerPoint formatting results	
Formatting status after source data is updated	**Format type**
Preserved	• Any custom formatting applied in the presentation, such as borders, positioning, and resizing • Any custom formatting applied in the presentation, such as the cell fill, cell borders, font size, and font style
Updated	• Formatting applied to a chart in the report, such as the palette or legend • Added columns or rows are overwritten • Deleted columns or rows are displayed in the document

Refresh limitations and considerations

Following are some considerations or limitations that you might encounter when performing the refresh process:

• Copying Microsoft Excel worksheets

While you can copy or move imported elements between worksheets by using Windows Copy and Paste commands, you cannot properly refresh the source data on the copied content. Similarly, you cannot refresh content on a new worksheet that was copied from an existing worksheet. The report elements on the copied worksheet are no longer linked to the source data. You must reimport the report or report element on the new worksheet to properly refresh the source data.

• Increasing and decreasing number of rows in lists and crosstabs

When an imported list or crosstab is refreshed in Microsoft Excel, the number of rows can increase or decrease as a result of new source data or changes to prompt values. If new source data is returned, the new range of cells is inserted after the last row of the current list or crosstab. The new range of cells inherits the formatting style of the last row in the list or crosstab.

If new prompt values or updated source data result in a reduced number of rows, the spare cells are deleted from the list or crosstab in the Excel worksheet.

Refreshing report structures

If there are changes to the report structure since you last imported a report or a report element, you can retrieve the latest changes from the IBM Cognos Analytics content store.

Changes to the report structure include the addition and deletion of a report element (chart, list, or crosstab) to the original report design.

Changes to the following objects are also considered updates to the report structure:

• the report element name that uniquely identifies the object

• the report element type

For example, a list object was changed to a crosstab object.

• for IBM Cognos Workspace workspaces, the report widget's unique identifier

In IBM Cognos Workspace, when a report object is added to a workspace, it is displayed in a report widget. The objects in a report include both full reports and the individual report parts, such as tables (lists and crosstabs) and charts.

Each report widget has a unique identifier. For example, two report widgets that are created from the same report will have different unique identifiers, whether the widgets are in the same workspace or in different workspaces.

Report elements that have moved from one part of the report, such as the footer, header, body, or page, to another part of the report are also updated when you refresh the report structure. However, these changes are not detailed in the **Refresh Report Structure** wizard.

Rich text subelements, such as images and tables, that were added or deleted, are not updated when you refresh the report structure. You must reimport the rich text element to retrieve the latest changes to its corresponding subelements. Similarly, if you manually remove a subelement in IBM Cognos for Microsoft Office, when you complete the refresh process, no updates are retrieved from the report server and the subelement is not updated. Changes to the div or span elements are not considered changes to the report structure.

To automatically check for changes in the report structure each time that you refresh a report or import a report element, in the **Options** dialog box, you must select the **Check for report updates on refresh** check box. For details on how to set this option, see "Checking for updates to the report structure" on page 26.

When new report elements are identified and the refresh process is complete, the elements are added to the report tree on the **Manage Data** tab. A star symbol is displayed in the upper left of the report object icons to indicate that the report elements have unique names.You must manually import the added elements to include them in the current report. Elements that were added to the report specification, but do not contain unique names or identifiers, are disabled and cannot be imported.

When the refresh process is complete, report elements that were identified as missing since you last imported the report are converted to stand-alone (static) elements. That means there is no link between the data in the document and the report on which that data is based. The missing elements are displayed in the report tree on the **Manage Data** tab with a strikethrough character and are not available for import.

If you determine that a missing element is not required for your report analysis, you can remove the element from the report after the refresh process is complete by using Microsoft Office commands. The star and strikethrough symbols that are displayed in the upper left of the report object icon identify new or removed elements that remain until you refresh the report or report element, or until the Microsoft Office document is closed.

Clearing cells of content

You can clear cells in Excel to remove the contents, such as formulas or data. The cleared cells remain as blank cells on the worksheet. Formats, such as number formats, conditional formats, and borders are retained.

You may want to clear cells before saving a report so that

- report consumers are required to refresh data to obtain the latest changes from the data source
- report consumers are authenticated before they are able to view report content

Tip: On the IBM Cognos Office toolbar, click the **Clear All Data** button .

You can also automate this task by using the ClearAllData method. For more information, see "ClearAllData " on page 76.

Clearing the contents does not break the link to the data sources. Because of the way newer versions of Microsoft Excel, such as Excel 2007 or Excel 2010 open workbooks created in Excel 2003, some values are visible in a published and cleared Excel 2003 workbook when it is opened in Excel 2007 or 2010. Opening the workbook in a newer version of Microsoft Excel triggers recalculation, which includes refresh of the IBM Cognos data.

You can continue with your crosstab, list, or analysis, and then refresh your content with current data from the content store.

For information about reports or content cleared in IBM Cognos for Microsoft Office, see "Remove a report or data from a Microsoft Office document" on page 54.

Convert dynamic data to static data

If you modify a report, an analysis, or a crosstab that you do not want to update with changes from the content store, you can convert the dynamic data items to static by disconnecting from the content store.

Tip: On the IBM Cognos Office toolbar, click the **Convert to Static** button .

When you convert dynamic data to static data in Excel, any query-related information, such as calculations and filters, is removed from the Microsoft Office document but the data values are preserved.

Publishing a Microsoft Office document to IBM Cognos Connection

Publish your IBM Cognos Office documents to IBM Cognos Connection to share them with other users in a secure and centrally managed way. Users can refresh the data based on their user authentication privileges in IBM Cognos Analytics.

You can also automate this task by using the Publish method. For more information, see "Publish" on page 78.

If IBM Cognos Analytics users do not have IBM Cognos Office installed, they can view the document and its contents, but they cannot refresh the data or update the contents.

Before you begin

For Microsoft Word documents, you must first save the document before publishing the document to IBM Cognos Connection. Word must have a file to which to save the document before it can be published. For Excel and PowerPoint, the worksheet or slide is saved to a temporary file before it is published.

Procedure

1. Open the document.
2. Choose whether you want to save your document with recent data:

   - To save the document with the most up-to-date data, on the IBM Cognos toolbar, click the **Refresh All Data** button .

   - To save the document as a template without data, on the IBM Cognos Office toolbar, click the **Clear All Data** button .

3. On the IBM Cognos Office toolbar, click the **Publish** button .
4. If prompted, click your namespace and type your user name and password.
5. In the **Look in** box, click the IBM Cognos Analytics server where you want to publish the document.
6. Choose the type of folder in which you want to save the document:

   - To save the document in public folders, click **Public Folders**.

   - To save the document to your content, click **My Folders**.

7. In the **Name** box, type the name of your document.
8. If you want, in the **Description** box, type a description for the document.
9. Click **Publish**.

Results

The document is published to IBM Cognos Connection.
Related concepts
Search path for previously imported PowerPlay reports

Open, save, and download Microsoft documents

You may have existing workbooks or presentations that you want to update with IBM Cognos Analytics content. Your business situation may have changed and you now want to apply various business scenarios. To refresh your data or make enhancements, you can download published Microsoft Office documents or open local documents. You can then use the Microsoft Office application of your choice to make changes.

Settings for custom properties that were specified in earlier versions of IBM Cognos for Office documents or workbooks become the new settings in the **Options** dialog box. For example, when an earlier version of an IBM Cognos Office-enabled document is opened, the address for the IBM Cognos Analytics gateway appears in the list of addresses under **IBM Cognos Systems**, if one was not already defined in custom properties.

Opening and saving a report locally from IBM Cognos Connection

You can store the reports that you create or modify on the IBM Cognos Analytics server. You can also open and save those reports on your computer. This is useful if you want to send a report to a report author who is working in a different environment, or you want to save the report to a source code controlled directory on a local network or drive.

Folders in IBM Cognos Connection are logically labeled and organized to help you locate reports. Entries in **Public Folders** are of interest to and can be viewed by many users. Entries in **My Folders** are accessible by you only when you are logged on.

If you are working from IBM Cognos Connection, you can also download a Microsoft document and open it in the application that was used to create it. For more information, see "Downloading a Microsoft Office document from IBM Cognos Connection" on page 23.

Before you begin

You must have write access to a folder to create entries.

Procedure

1. On the IBM Cognos Office toolbar, click the **Open** button .
2. In the **Look in** box, select the IBM Cognos Analytics server that contains the report that you want.
3. Choose the type of folder in which the report is saved:

   - To view content in public folders, click **Public Folders**.
   - To view only your content, click **My Folders**.
4. Click the report that you want, and click **Open**.

Results
The report appears in your workbook, slide, or document. You can make changes and manipulate data, and publish it to IBM Cognos Connection for sharing. For more information, see "Publishing a Microsoft Office document to IBM Cognos Connection" on page 22.

Downloading a Microsoft Office document from IBM Cognos Connection

You can download a Microsoft Office document from IBM Cognos Connection if it was published in one of the IBM Cognos Office applications, such as IBM Cognos for Microsoft Office.

You can download documents created in Excel, PowerPoint, and Word. The default action for any Microsoft Office document is to download it.

For more information, see the IBM Cognos Analytics *Administration and Security Guide*.

Before you begin

You must have read and traverse permissions to access Microsoft Office documents in IBM Cognos Connection.

Procedure

1. In IBM Cognos Connection, locate the document that you want to open.
2. Click **more** on the actions toolbar next to the document that you want to download.

   The IBM Cognos Connection **Actions** page opens.
3. Choose to download the Microsoft Office document that you want:

   - For a Microsoft Office workbook, click the **View most recent document in Excel** button .
   - For a Microsoft Office presentation document, click the **View most recent document in PowerPoint** button .

   - For a Microsoft Office word document, click the **View most recent document in Word** button .

   The **File Download** dialog box appears.
4. Click **Save** and follow the prompts that appear.

   You must save the document before using it with any of the IBM Cognos Office applications. When you open the document, it opens in the application that was used to create it.

Results

You can now perform the same actions that you would perform for any Microsoft Office document of the selected type.

Related concepts
Search path for previously imported PowerPlay reports

Chapter 5. Using IBM Cognos for Microsoft Office

Use IBM Cognos for Microsoft Office to access IBM Cognos Analytics content in Microsoft Excel where you can work with existing reports, apply calculations, and use your existing Excel macros. You can also import content into Microsoft PowerPoint and Microsoft Word. You can use Cognos Analytics content as the basis for your presentation in PowerPoint, or for briefing books using Word.

Use IBM Cognos for Microsoft Office with any of the supported Microsoft Office applications to do the following:

- Access IBM Cognos content by importing pre-authored reports and data.
- Modify IBM Cognos Analytics content using familiar interfaces.
- Refresh the Microsoft Office documents with updated information on demand for strategic planning, forecasting, and business reporting.
- Publish and share IBM Cognos-enabled files to the secure IBM Cognos Analytics portal. For more information, see "Publishing a Microsoft Office document to IBM Cognos Connection" on page 22.

Access Permissions and Credentials

Security is maintained in your Microsoft Office environment. For example, if you share an Excel workbook with coworkers, when they connect to the IBM Cognos Analytics server to retrieve or refresh data, their security permissions are used. A logon within the Microsoft Office environment authenticates you and ensures proper administration.

Because IBM Cognos for Microsoft Office uses temporary folders while importing report content into Microsoft Office, when adding a new user, the system administrator must add TEMP and TMP user variables to the new user's Environment variables. These variables are not added automatically when a new user is added.

For more information about access permissions, see Appendix C, "Access permissions and credentials," on page 127.

Customizing IBM Cognos for Microsoft Office

You can set options that apply to IBM Cognos for Microsoft Office or specifically to your report analyses.

Viewing information cards

IBM Cognos for Microsoft Office provides information cards to display a thumbnail view of the report or workspace content. The information card also displays high-level information about the reports or report items, such as owner, contact information, and the date the report was last modified.

When you enable the information card feature, the information card is displayed in the following areas:

- in the source tree, when you hover the mouse over the report or report item, or by right-clicking the item and selecting the **Show information card** menu option
- on the **Select Report Elements** page of the **Import Content** wizard, when you hover the mouse over the report item
- on the individual report-element pages of the **Import Content** wizard

When the IBM Cognos Analytics server exceeds its workload and does not respond in the required time, it is unable to generate the thumbnail for the report or report object. When this time-out event occurs, the default thumbnail image is returned.

Procedure

1. On the IBM Cognos toolbar, click the **Options** icon ⚙.
2. In the navigation pane, click **IBM Cognos for Microsoft Office**.
3. Under **Application Settings**, choose whether to show or hide business cards:
   - To show information cards so that you can preview items in the source tree or the **Import Content** wizard, select the **Show Information Cards** check box.
   - To hide the information cards, clear the **Show Information Cards** check box.
4. Click **OK**.

Results

The setting takes effect immediately.

Showing cell-based border styles in Microsoft Word

When a crosstab is imported into Microsoft Word, special cell-based border styles are not recognized. IBM Cognos for Microsoft Office respects the formatting style defined for the first cell in the table and applies this style to the entire report.

To show cell borders in the report as defined by the report author, you must select the setting in the **Options** dialog box.

Selecting the option to show cell-based border styles could negatively affect performance given the time needed to evaluate the cells and apply the proper formatting style.

Procedure

1. On the IBM Cognos toolbar, click the **Options** button ⚙.
2. In the navigation pane, click **IBM Cognos for Microsoft Office**.
3. Under **Output Settings**, to show cell-based border styles in Microsoft Word, select the **Show custom borders in Word** check box.
4. Click **OK**.

Checking for updates to the report structure

You can retrieve updates to the report structure each time that you refresh source data or import a report element in a Microsoft Office document.

About this task

When the **Check for report updates on refresh data** feature is enabled, each time that you refresh all reports or a report element, you are prompted to check for changes to the report structure. Changes to the report structure include report elements that were added or removed from the report since it was last imported into the Microsoft Office document.

If you clear the **Check for report updates on refresh data** check box and you want to refresh the report structure at a later time, you can use the **Refresh Report Structure** pop-up menu command from the **Manage Data** tab. From the **Manage Data** tab, you can select the particular report whose structure you want to refresh during the active session.

Note: Use caution when enabling this feature. For situations that require you to refresh multiple reports, such as upgrading reports from an earlier version, each refresh process checks for any changes to the report structure. It is possible that the Microsoft Office document contains several reports for which the report specification has changed, and you might be prompted to check for the updates for each report. In this case, you can disable the feature so that you can facilitate the refresh process.

Procedure

1. On the IBM Cognos toolbar, click the **Options** button ⚙.
2. In the left navigation pane, click **IBM Cognos for Microsoft Office**.
3. Under **Application Settings**, choose whether you want to retrieve updates for the report structure:

    - To check for updates to the report structure each time that you refresh the source data or report formatting, select the **Check for report updates on refresh data** check box. This setting is enabled by default.
    - To retrieve updates for only the source data or formatting, without checking for changes to the report structure, clear the **Check for report updates on refresh data** check box.

4. Click **OK**.

Results

The change takes immediate effect; based on the following rules:

- If the check box is selected, the program checks for updates to the report structure each time that you use one of the following commands:

    - **Refresh all Data** command (IBM Cognos toolbar menu)
    - **Refresh Data** command (pop-up menu on the **Manage Data** tab)
    - **Refresh Data and Formatting** command (pop-up menu on the **Manage Data** tab)
    - **Import Element** command (pop-up menu on the **Manage Data** tab)

- If the check box is cleared and an imported element is identified as missing from the originally authored report, the report element is displayed as disabled in the report tree on the **Manage Data** tab. When the report or report element is refreshed, no corresponding updates are made to the data for the element.

Retrieving content from IBM Cognos Analytics

You can import report content into the Microsoft Excel, Microsoft PowerPoint, and Microsoft Word applications.

To import content from pre-authored IBM Cognos reports, you must select the report elements that you want to work with in your Microsoft Office application.

You can import IBM Cognos Analytics elements such as crosstabs, graphs, and charts. You can maintain the original report formatting and identify its source and creation date. After the content is imported, you can manipulate it with Microsoft Office features, such as Auto Filter, Charting, Formatting, and Comments. You can then refresh the content and maintain links to the contextual information.

Report elements contain pages, which are containers for the layout objects that define the appearance and formatting of a report. A page is made up of a header (optional), body (mandatory), and footer (optional). The headers and footers may include text, such as page numbers or images. The body element presents the data in a meaningful way by including report types such as lists, crosstabs, charts, maps, or repeaters. Repeaters are tables into which report authors can insert items that will be repeated. For example, you can use repeaters to repeat customer names or addresses.

Note: If charts are contained in repeater controls within Excel, refreshing data may cause the charts to duplicate.

Object names in IBM Cognos Report Studio

By using the **Name** attribute in IBM Cognos Report Studio, report authors can label report elements using descriptive names to uniquely identify the objects. If an author does not define a name for an element, a unique default value for the **Name** property is automatically generated during the import process for the following elements:

- list

- crosstab
- repeater table
- chart elements, such as pie, scatter, and combination

When a report element has a name, it can be refreshed with the most recent data from the content server. Elements, such as text and images, that do not have defined names are not available for importing. The report author must specifically name these objects.

In Microsoft Word, the length of bookmark names is restricted to 40 characters. If the name of a report element that is imported into Word exceeds the 40-character limitation, the report element name is truncated to 40 characters. For more information, see "Import IBM Cognos report elements into Microsoft Word" on page 38.

Multilingual reports and content language

IBM Cognos Analytics users can personalize the way data appears in IBM Cognos Connection by changing user preferences. For example, users can set the content language or product language. The content language views and produces content in IBM Cognos Analytics, such as name and description of entries in IBM Cognos Connection, or data in reports. Users can specify the default language to be used when a report is run. When a language is not specified in the report properties, the language in the user preferences is used.

Microsoft Office applications, such as Excel, interpret and show the data correctly according to the user locale settings in Windows. For this reason, IBM Cognos for Microsoft Office does not support the language associated with the user preference settings in IBM Cognos Connection or the language specified in the report properties.

For example, if the user preferences settings in IBM Cognos Connection specify the content locale as German, and the client computer has the regional options set to English (United States) locale, when the report is imported into Excel, Word, or PowerPoint, the content or report data is reformatted to match the English (United States) locale setting.

Additional supported report objects

Additional objects are imported when they are part of the IBM Cognos report layout.

Table 3. Supported report objects

Object	Description
Conditional blocks	Contain items that may be rendered if the condition is met. They are used for conditional formatting, such as highlighting exceptional data in a report. Contents of conditional blocks appear in italics in the **Import Content** wizard and on the tree hierarchy on the **Manage Data** tab.
Repeater blocks	Used to insert repeated items. Blocks are often used to lay out horizontal bands of information. In PowerPoint, items inside the repeater block are assigned the same font as all other items and may not appear as intended.

Object	Description
	Table 3. Supported report objects (continued)
Object	**Description**
Rich text items	Used to render HTML in the layout. These can also render in PDF output. Rich text items are useful for adding annotations defined in a data source to a report. Rich text items support only a restricted set of well-formed XHTML. Certain conditions apply when using rich text items. For example, rich text items that are nested in a list element are not supported, and inserting HTML code in the rich text items is also not supported.
Hyperlinks	May be added by report authors so that users can jump to another place, such as a Web site.
Repeater tables	Used to render query data in a table.

With the exception of Excel, any borders that were added to objects in the report, such as a column, a header, or a footer, are also imported. The width, style, and color of the borders are mapped to the Microsoft Office style.

When a crosstab is imported into Microsoft Word, special cell-based border styles are not recognized. In this case, you can set the option to show cell-based border styles in Microsoft Word. For more information, see "Showing cell-based border styles in Microsoft Word " on page 26.

Related concepts

Importing rich text elements and statistical information
In addition to text and images, report authors can add other objects to the report layout. Reports can contain rich text elements or statistical information that can be imported into a Microsoft Office document.

Importing workspace content

Unsupported report objects and formatting properties

The following report objects or formatting properties are not imported:

- text flow, such as Kashida spacing and bidirectional text
- text properties, such as word breaks and justification styles
- top and bottom cell padding

  Left and right margins set in IBM Cognos Report Studio are imported in Microsoft Office Word to show hierarchical indentation only in rows. Support includes any specified Level Indentation properties that show hierarchical structure when a report is run. For example, when using a dimensionally-modeled relational data source for financial reporting, expanding the hierarchies from a dimension in a crosstab will show the correct indentation for the child members as set in IBM Cognos Report Studio.

  Left and right padding that was applied in IBM Cognos Report Studio to an object to add white space between the object and its margin or, if there is a border, between the object and its border, is also supported.

- bookmarks that are used in PDF or HTML reports
- scaling formatting, which you must reproduce in Excel after the actual value is imported "Importing scaling formatting" on page 30.
- HTML items

  These items are containers in which users can insert HTML code. HTML items can be anything that your browser runs, including links, images, multimedia, tooltips, or JavaScript.

- background images, such as watermarks
- layout of objects that are embedded within a list or crosstab

    For example, reports authored in IBM Cognos Report Studio can contain list objects embedded within list objects, with specific formatting applied. When converted to the tabular representation available in Microsoft Excel, these reports may not be rendered in the same way that they appeared in Report Studio.

- merged cells

    Report authors can merge multiple cells when adding headers or footers in the original report. With the exception of crosstabs imported into Word, merged multiple cells are not supported.

Named ranges in Excel

In Microsoft Excel, report content is imported to named ranges, which are descriptive names for groups of cells. If the report type is a crosstab, rows, columns, and measures of the report are each assigned a named range. If the report type is a list, the combination of rows and columns is assigned a named range.

For example, if you imported the Report Studio crosstab sample, the following default named ranges have been assigned.

Table 4. Crosstab named ranges	
Named range	**Group of cells**
BudgetvsActual_Crosstab1_Crosstab1	The entire crosstab
BudgetvsActual_Crosstab1_Crosstab1_Columns	All column header cells in the crosstab.
BudgetvsActual_Crosstab1_Crosstab1_Measure	The intersecting column and row header cell of the crosstab, such as A1.
BudgetvsActual_Crosstab1_Crosstab1_Rows	All row header cells in the crosstab

You can use named ranges to manage content in Microsoft Excel. You can select the range when you need it for charts or pivot tables, or to jump to a specific location in your document. For example, you can move the block of cells that are in Sheet 12 to create a chart of that data in Sheet 20 by just referring to the named range. This eliminates the task of moving through the sheets to get to Sheet 12 and then highlighting the range.

Named ranges must be unique. IBM Cognos for Microsoft Office assigns a default unique name and location to a report when it is imported. To assign a more obvious name to a report, you can change this default name only if it is unique and follows the Excel conventions for named ranges. When typing a name for a named range, you must follow the conventions set in Excel, which forbids the use of special characters except underscore (_) and requires a letter for the starting character.

Importing scaling formatting

Report authors can change the way values are represented to bring them into a different range based on the decimal scale. For example, when importing reports or report elements into Microsoft Word or Microsoft PowerPoint, values can appear in thousands, millions, or in currency units depending on the scale used in IBM Cognos Report Studio.

Scaling formatting is preserved when reports or report items are imported into Microsoft Word or Microsoft PowerPoint. With a variety of format and layout commands, Microsoft Word and Microsoft

PowerPoint are used as ways to present information. These applications are used to quickly construct professional-looking content by retaining predefined formatting as set in Report Studio.

Scaling formatting is not imported into Microsoft Excel. Microsoft Excel is better suited for manipulating and calculating formula-intense spreadsheets, discovering and illustrating important trends, and charting business data. This is possible only when the full value of a number is captured. When imported, users can easily format numeric data based on dynamic business requirements.

Importing IBM Cognos PowerPlay reports

You may have saved Microsoft Office documents that used object elements from Series 7 PowerPlay reports. When these reports are refreshed, if you have not migrated the Series 7 PowerPlay reports to IBM Cognos Analytics, you send requests to Report data service (RDS) for data that resides on a Series 7 PowerPlay server. The report data service (running on the IBM Cognos Analytics application server) communicates with Series 7 PowerPlay through the Series 7 PowerPlay Enterprise Server gateway.

However, to connect to Series 7 PowerPlay reports that were migrated to IBM Cognos Analytics, you must change the location of the report to the new location in Content Manager. This is done by copying the Search Path property of the IBM Cognos PowerPlay report that was published to IBM Cognos Connection and ensuring that it matches the search path property for the same report in IBM Cognos for Microsoft Office.

You must save the document in IBM Cognos for Microsoft Office to reflect the new location. If the document was published to IBM Cognos Connection, you must republish the updated document, which contains the new search path, to IBM Cognos Connection.

Search path for previously imported PowerPlay reports

If you attempt to refresh an existing report that is connecting to a Series 7 PowerPlay data source that was migrated to the Content Manager, an error is generated as follows:

RDS-ERR-1018 The IBM Cognos report <Report_Name> could not be run. The expected response was not returned by IBM Cognos 8.

The migrated PowerPlay report in the content store has a different search path than the Series 7 PowerPlay report in IBM Cognos for Microsoft Office that was saved locally or previously published to IBM Cognos Connection. You must change the search path in IBM Cognos for Microsoft Office to match the search path that is shown in IBM Cognos Connection.

Related tasks
Publishing a Microsoft Office document to IBM Cognos Connection
Downloading a Microsoft Office document from IBM Cognos Connection

Viewing the search path for PowerPlay reports in IBM Cognos Connection

You can view the search path of a previously-imported PowerPlay report in IBM Cognos Connection.

Procedure

1. Open IBM Cognos Connection.
2. Locate the entry for the PowerPlay report for which you want view the search path.
3. In the **Actions** column, click the set properties button for the entry.
4. On the **General** tab, click **View the search path, ID and URL**.

   The search path shows the fully qualified location and the ID of the entry in the content store. Entries are assigned a unique identification number (ID).
5. Copy the search path.

Adding a new search path to migrated PowerPlay reports in IBM Cognos for Microsoft Office

You can add a new search path to a previously-imported PowerPlay report in IBM Cognos for Microsoft Office.

Procedure

1. Open IBM Cognos for Microsoft Office.
2. Open the Series 7 PowerPlay document that was saved locally, or download the document from IBM Cognos Connection for which you want to change the search path.

   For instructions about downloading the document from IBM Cognos Connection, see "Downloading a Microsoft Office document from IBM Cognos Connection" on page 23.
3. From the IBM Cognos pane, click the **Manage Data** tab.
4. Select the Series 7 PowerPlay report and, in the **Properties** pane, expand **Report**.
5. In the **Search Path** property, paste the new location of the report that you copied from IBM Cognos Connection.
6. Choose whether to save the document with data:

   - To save the document with the most up-to-date data, on the **Manage Data** tab, right-click the report, and then click **Refresh Data**.
   - To save the document without data, on the **Manage Data** tab, right-click the report, and then click **Remove data**.
7. From the **File** menu, click **Save**.
8. If the report was previously published to IBM Cognos Connection, you must republish the report with the new search path.

   For instructions about publishing to IBM Cognos Connection, see "Publishing a Microsoft Office document to IBM Cognos Connection" on page 22.

Importing workspace content

You can import report widgets and workspaces that were created and assembled using IBM Cognos Workspace into any of the supported Microsoft applications. A workspace is a collection of widgets that typically display the following content:

- report widgets, which contain reports or report parts (lists, crosstabs, and charts)
- metric lists and individual metrics

When a report object (report or report part) is added to a workspace in IBM Cognos Workspace, it is displayed in a report widget. Report objects include reports created in IBM Cognos Report Studio, IBM Cognos Query Studio, IBM Cognos Analysis Studio, and IBM Cognos Metric Studio. If a report that contains several report parts was added to a workspace, all of the parts are displayed in a single report widget, including the report header and footer.

Objects in a report include both full reports and the individual report parts, such as tables (lists and crosstabs) and charts. All report parts that are supported for import from Report Studio or Analysis Studio are also supported for import from the workspaces. For more information about supported report elements, see "Additional supported report objects" on page 28. The full report and the individual report parts that make up a report widget are available for selection in the **Import Content** wizard or on the tab pages of the IBM Cognos pane.

For example, suppose the pre-assembled workspace that you want to import includes the following content in a report widget:

- an image
- a full report (includes two charts and a crosstab)
- a list report

- a chart

These elements are shown as report items that you can select in the **Import Content** wizard. So if on the **Select Report Elements** page of the wizard you select to import the image, the full report, and the list report into Excel, the worksheet renders the image, the full report and all the report objects, including the two charts and crosstab, and the list report.

Tip: The Revenue Data Workspace and Employee Satisfaction Workspace samples in the GO Data Warehouse (analysis) package, GO Office Report Samples, are based on workspaces created in IBM Cognos Workspace. For more information about The Sample Outdoors Company samples, see Appendix B, "Sample reports and packages," on page 119.

Related concepts
Additional supported report objects

Importing rich text elements and statistical information

In addition to text and images, report authors can add other objects to the report layout. Reports can contain rich text elements or statistical information that can be imported into a Microsoft Office document.

Report authors may insert rich text objects to render a subset of HTML in the report layout. The HTML may come from either a static or dynamic source. Rich text items support all XHTML character entities, such as   (non-breaking space), and the following subelements: div, span, ul, ol, and li. Each element supports only the style attribute, which must contain a valid CSS style. In addition, ul and ol elements support list-style attributes. Specifically, the ol element supports decimal, and the ul element supports circle, disc, and square, including list-style-image.

Supported rich text subelements are div, span, text, lists, tables, and images. In IBM Cognos for Microsoft Office, a rich text element and all its subelements are imported as a discrete element. That is, only the top-level rich text element and not the individual subelements is available for selection in the **Import Content** wizard or on the tab pages of the IBM Cognos pane. However, when you import the rich text element, the individual subelements are displayed in sequential order as separate elements in the Microsoft Office document or worksheet. In PowerPoint, the text subelements are rendered as a floating text frame, image, or table on the same slide.

Statistical information

If the installation of IBM Cognos Analytics contains IBM Cognos Statistics, report authors can use statistical objects, such as linear regression, control chart, or correlation, as part of the report design. IBM Cognos Analytics integrates statistical objects in IBM Cognos Report Studio. The ability to import statistical information allows you to gain and share meaningful insights through statistical reporting and analysis that can be distributed to others. Report authors can create multiple statistical objects, which you can import into a Microsoft Office document.

Statistical information is imported as rich text elements. When a statistical object is imported, it can have subelements, such as charts, tables, or text elements.

Restrictions that limit the import of rich text elements or statistical information

The following are items that are not supported for import into a Microsoft Office document or describe limitations in the way the rich text object is rendered after an import or refresh process.

- Unsupported elements
  - nested tables

    If the rich text element is a table that contains another embedded table, only the outer table is rendered when imported.
  - embedded lists and images in tables

Embedded images and lists in tables are ignored during the import or refresh process and not rendered in the Microsoft Office document.

– Div and span layout information

Rich text subelements inside the div or span XHTML elements are rendered, but the associated style attributes of div and span are not supported. For example, suppose two text frames in a span subelement have a horizontal style attribute, the application renders the frames vertically when imported into the Microsoft Office document.

– Changes in the structure of the rich text element

If the structure of the rich text element has changed, you cannot automatically refresh the element to retrieve the most recent updates. Changes to the structure means any additions or deletions of the rich text subelements. To retrieve the most recent updates to the structure, you must reimport the rich text element.

For more information about refreshing the report structure, see "Refreshing report structures" on page 20.

• multiple text frames

When multiple text frames are embedded in a table cell, the text in each frame is concatenated and inherits the formatting style of the first embedded text frame.

Related concepts
Additional supported report objects

Import IBM Cognos report elements into Microsoft Excel

You can import report content, including data, metadata, headers, footers, and charts, from a variety of pre-authored IBM Cognos reports into Microsoft Excel for additional work.

The query used to import and refresh data is a query for the entire report element that you select. If your data or data structure, such as the number of rows and columns, changes on a subsequent refresh, the report element resizes, but other elements in the workbook may be overwritten. For more information, see "Refreshing report data and formatting" on page 19.

When you import values that have scaling applied, you will notice that the values appear as true values in IBM Cognos for Microsoft Office workbooks. You can recreate the scaling using Microsoft Excel calculation features.

Before you begin

Importing into Microsoft Excel using the **Import Content** wizard involves the following steps. To accept the default values for the report properties or layout of your content, you can click **Finish** at any time.

Before you can import report content, you must create a new Excel workbook or open an existing one.

For more information about best practices for working with Microsoft Excel, see "Techniques in Microsoft Excel " on page 67.

Procedure

1. Create a new Excel workbook or open a saved workbook.
2. In IBM Cognos for Microsoft Office, click the **Browse Content** tab.
3. Expand the list of reports from the node and click the report to import into the workbook.
4. Click **Import Content**.

   If this report was imported into this workbook already, a unique name for this instance of the report is assigned.
5. If you want to change the default name, in the **Name** box, type a different name, using no more than 215 characters.

6. Under **Report pages**, choose from the following:

- To insert report content in one continuous flow on the current worksheet, click **Ignore paging**.

- To insert the report content on the current worksheet and insert page breaks, click **Insert breaks between report pages** and, in the **Location** box, type the cell location where data appears on each worksheet.

- To copy each page of the report to a new worksheet, click **Create new worksheets for report pages** and, in the **Location** box, type the cell location where data appears on each worksheet.

7. Under **Report version**, choose whether you want to refresh or import content from a specific report output version:

- To run a report version with the most recent content changes, click **Run the report**.

  You must have execute permission to import a report with updated source data. You must have read and traverse permissions for the folder that contains the report. If you have only read and traverse permissions, you can import only the output versions of the report.

- To import a specific report output version, click **Select a specific output version** and, in the **Version** box, click the version that you want.

  Multiple versions of a report exist only if it is a burst report and has more than one burst key, or if the report has multiple language outputs. Multiple output formats, such as XML or HTML, are not considered distinct and separate versions of a report.

  You need only read and traverse permission to import a report output version.

8. If you selected **Select a specific output version**, on the **Select Report Properties** page, click the burst key that you want to import, and click **Next**.

   The burst key is the data item that contains the recipient information on which the report is burst. This information can be an email address or an expression that results in a search path to an object in Content Manager, such as an account, group, role, contact, or distribution list. As a burst recipient, you see only the data that is meant for you.

9. Choose whether to accept the default import setting:

- To accept defaults for placement and layout of report content, click **Finish**.

  If this is a prompted report, enter prompt answers and click **OK**.

  For information about prompted reports, see "Working with prompted reports" on page 41.

  The selected report elements appear in the workbook, and your import is complete.

- To choose settings for the placement and layout of report content, click **Next**. To jump to a particular page in the wizard, click the element or options page listed in the navigation pane of the wizard.

10. On the **Select Report Elements** page, click the report elements that you want to place in the workbook and click **Next**.

    Elements in italics are those that the report author set with the **Conditional Rendering** attribute, which specifies which objects are rendered when a report is run. Conditional rendering is not the same as showing or hiding objects. If the object is not rendered, it is not available in the report.

    A rich text element and all its sub-elements are imported as a discrete element. That is, only the top-level rich text element and not the individual sub-elements is available for selection.

11. In the **Name** box, type the name of the element to import.

12. In the **Location** box, type the sheet, column, and row designation.

    Click the cell selection button to select a cell range in the active workbook. The default is the active or current cell of the active workbook. Leave the **Location** box blank to automatically fit content after the previous element.

13. Select the workbook options that you want.

    Depending on the type of report, the workbook can include the following options.

Table 5. Microsoft Excel workbook options	
Option	**Description**
Hide Labels	Hides or shows labels for row or column metadata.
Repeat Labels	Repeats labels for row or column metadata.
Group	Groups row or column items using the Microsoft Excel Group feature. After you place content in a workbook, you may need to expand items to see the data in rows and columns.
Import as an Excel List	Shows items as a list, which enables list controls at the top of each column. This feature is not supported in Microsoft Excel 2002.
Ignore Formatting	For list report elements, imports numeric data without formatting or masks.
Automatically resize columns	Adjusts the column size to fit the contents.

14. Click **Next**.
15. For each report element, repeat steps 10 to 13.

    At any time, click **Finish** to accept the default settings and locations. The remaining elements use the settings from the last element that you set.
16. Click **Next**, and then click **Finish**.
17. If this is a prompted report, enter prompt answers and click **OK**.

    For information about prompted reports, see "Working with prompted reports" on page 41.

Results
The selected report elements appear in the workbook. Graphs and charts are imported as images.

Scaled values are imported as actual values. You must reproduce scaling in Excel after the actual, raw value is imported.

Import IBM Cognos report elements into Microsoft PowerPoint

You can import report content from various IBM Cognos Business Intelligence reports into your PowerPoint presentation. By default, report content is imported to the active slide. You can also choose to place content on a new or existing slide.

As you import report content into PowerPoint, keep in mind the following:

• Charts are imported as image objects but you can add borders and resize and reposition the objects.

• Lists and crosstabs are imported as table objects.

Select report elements that can be sized to fit on a slide.

For more information about best practices for working in PowerPoint, see "Techniques in Microsoft PowerPoint " on page 69.

Before you begin

Importing into Microsoft PowerPoint using the **Import Content** wizard involves the following steps. To accept the default values for the report properties or layout of your content, you can click **Finish** at any time.

Before you can import report content, you must create a new slide or open an existing one.

Procedure

1. Create a new PowerPoint presentation or open a saved presentation.
2. In IBM Cognos for Microsoft Office, click the **Browse Content** tab.
3. Expand the list of reports from the top node and click the report that you want to import into the presentation.
4. Click **Import Content**.

   The **Import Content** wizard appears.

   If this report was imported into this presentation already, a unique name for this instance of the report is assigned.
5. To change the default name, in the **Name** box, type a name using no more than 215 characters, and click **Next**.
6. Under **Report pages**, choose from the following:

   • To ignore pages and insert content on designated slides, click **Ignore paging**.

   • To create new slides for each page of the report, click **Create new slides for report pages**, and then select a slide that precedes the content that you are importing.

     By default, it is the active slide.

   • If you want to respect the page size settings specified in Report Studio or Query Studio, and allow the program to automatically insert page breaks, click **Respect soft page breaks**.

     When the imported content exceeds the space available on the slide page, PowerPoint creates a soft page break as content flows automatically from the end of one slide to the beginning of the next slide. Usually this is at the end of the slide content, but can happen earlier based on other factors, such as slide footers, or slide size. Use this option if the position where PowerPoint divides your content is not critical to your task or analysis.
7. Under **Report version**, choose whether you want to refresh or import content from a specific report output version:

   • To run a report version with the most recent content changes, click **Run the report**.

     You must have execute permission to import a report with updated source data. You must have read and traverse permissions for the folder that contains the report. If you have only read and traverse permissions, you can import only the output versions of the report.

   • To import a specific report output version, click **Select a specific output version** and, in the **Version** box, click the version that you want.

     Multiple versions of a report exist only if the report is a burst report and has more than one burst key, or if the report has multiple language outputs. Multiple output formats, such as XML or HTML, are not considered distinct and separate versions of a report.

     You need only read and traverse permissions to view a report output version.
8. Choose whether to accept the default import setting:

   • To accept defaults for placement and layout of report content, click **Finish**.

     If this is a prompted report, enter prompt answers and click **OK**.

     For information about prompted reports, see "Working with prompted reports" on page 41.

     The selected report elements appear in the presentation on the active slide, and your import is complete.

   • To choose settings for the placement and layout of the report content, click **Next**.

     To jump to a particular page in the wizard, click the element or options page listed in the navigation pane of the wizard.
9. On the **Select Report Elements** page, click the report elements that you want to place in the presentation and click **Next**.

Elements in italics are set by the report author with the **Conditional Rendering** attribute, which specifies which objects are rendered when a report is run. Conditional rendering is not the same as showing or hiding objects. If the object is not rendered, it is not available in the report.

10. In the **Name** box, type the name of the element to import.

If this element was already imported into this presentation, a unique name for this instance of the element is assigned. You can assign a name using no more than 215 characters.

11. In the **Location** box, click the slide number.

Click the **New Slide** button to add a slide to the presentation.

12. If the element is a crosstab or list element, choose how you want to show it on the slide using the following options.

- **Import as a chart object**

    Imports the element as a chart object.

- **Number of rows to display**

    Used to fit larger reports on a slide. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of rows based on the content that is being imported. For objects, including repeater tables, that have more than 25 rows, the content is truncated to 25 rows, which is the PowerPoint maximum for version 2003. For PowerPoint version 2007 and 2010, content is truncated to 75 rows.

- **Number of columns to display**

    Used to fit larger reports on a slide. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of columns based on the content that is being imported. For objects, including repeater tables, that have more than 25 columns, the content is truncated to 25 columns, which is the PowerPoint maximum for version 2003. For PowerPoint version 2007 and 2010, content is truncated to 75 columns.

13. If the object is a composite report imported from IBM Cognos Workspace, and you want to create a new slide for each element in the composite report, select the **Create new slides for elements** check box.

The first element in the report is placed on the slide specified in the **Location** box. Each remaining element is placed on a separate slide. If the check box is cleared, each report element is layered over another element on the active slide.

14. Click **Next**.

15. For each report element, repeat steps 10 to 14.

At any time, click **Finish** to accept the default settings and locations. The remaining elements use the settings from the last element that you set. To put each report element on a new slide, in the **Location** box click **New Slide**.

16. Click **Next**, and then click **Finish**.

17. If this is a prompted report, enter the prompt answers and click **OK**.

For information about prompted reports, see .

Results
The selected report elements appear in the presentation. Graphs and charts are imported as images.

Import IBM Cognos report elements into Microsoft Word

You can import report content, including data, metadata, headers, footers, and charts, from a variety of pre-authored IBM Cognos reports. You must select the report elements that you want to work with in your Word document. By default, report content is imported to the main flow of the active page. You can choose to place some types of content in its own floating text box.

You can copy or move imported elements between document pages, headers, and footers by using Windows **Copy** and **Paste** commands. Each copy of an element retains its link to IBM Cognos for Microsoft Office. Changing the number of rows or columns in a table changes the amount of data that is refreshed. The shape accommodates as much data as it can fit. If the **Autosize** option is used, the application adds or deletes rows or columns as necessary.

In Microsoft Word, the length of bookmark names is restricted to 40 characters. If the name of a report element that is imported into Word exceeds the 40-character limitation, the report element name is truncated to 40 characters. If the first character of the report element name begins with a number, an underscore is prefixed to the name. Microsoft Word bookmarks cannot begin with a number.

For more information about best practices for working in Microsoft Word, see "Techniques in Microsoft Word " on page 70.

Before you begin

Importing into Microsoft Word using the **Import Content** wizard involves the following steps. To accept the default values for the report properties or layout of your content, you can click **Finish** at any time.

Before you can import report content, you must create a new Word document or open an existing one.

Procedure

1. Create a new Word document or open a saved document.
2. In IBM Cognos for Microsoft Office, click the **Browse Content** tab.
3. Expand the list of reports from the top node and click the report that you want to import into the document.
4. Click **Import Content**.

   If this report was already imported into this document, a unique name for this instance of the report is assigned.
5. If you want to change the default name, in the **Name** box, type a name using no more than 215 characters.
6. If the report element is a workspace composite report from IBM Cognos Workspace, and you want to set a page break before each report object in the composite report, select the **Insert a break before this element** check box, and then in the element box, click the pagination option to control where Microsoft Word positions automatic page breaks.
7. Under **Report pages**, choose from the following.

   - To ignore the report page breaks and feed the content continuously down the Word document pages, click **Ignore paging**.

   - To place content on Word document pages using page breaks, column breaks, text wrapping breaks, or section breaks, click **Insert breaks between report pages**, and then, in the **Location** box, click the pagination option to control where Microsoft Word positions automatic page breaks.

   - If you want to respect the page size settings specified in Report Studio or Query Studio, and allow the program to automatically insert page breaks, click **Respect soft page breaks**.

     When the imported content exceeds the space available on the document page, Word creates a soft page break as content flows automatically from the end of one page to the beginning of the next page. This is usually at the end of the page content, but can happen earlier based on other factors, such as page footers, footnotes, or widow/orphan control. Use this option if where Word divides your content is not critical to your task or analysis.
8. Under **Report version**, choose whether you want to refresh or import content from a specific report output version:

   - To run a report or report version with the most recent content changes, click **Run the report**.

You must have execute permission to import a report with updated source data. You must have read and traverse permissions for the folder that contains the report. If you have only read and traverse permissions, you can import only the output versions of the report.

- To import a specific report output version, click **Select a specific output version**, and in the **Version** box, click the version that you want.

  Multiple versions of a report exist only if it is a burst report and has more than one burst key, or has multiple language outputs. Multiple output formats, such as XML or HTML, are not considered distinct and separate versions of a report.

  You need only read and traverse permissions to view a report output version.

9. Choose whether to accept the default import setting.

- To accept defaults for placement and layout of report content, click **Finish**.

  If this is a prompted report, enter prompt answers and click **OK**.

  For information about prompted reports, see "Working with prompted reports" on page 41.

  The selected report elements appear in the document, and your import is complete.

- To choose settings for the placement and layout of report content, click **Next** and follow the steps for setting the placement and layout of report elements.

  To jump to a particular page in the wizard, click the element or options page listed in the navigation pane of the wizard.

10. On the **Select Report Elements** page, click the report elements that you want to place in the document and click **Next**.

    Elements in italics are those that the report author set with the **Conditional Rendering** attribute, which specifies objects that are rendered when a report is run. Conditional rendering is not the same as showing or hiding objects. If the object is not rendered, it is not available in the report.

11. In the **Name** box, type the name to import.

    If the element was already imported into this document, a unique name for this element instance is assigned. If you choose, you can assign a name using no more than 215 characters.

12. Depending on the type of report and the elements that you are selecting, you must specify some or all of the following options for each element.

- **Insert a break before this element**

  Inserts a break before the element.

  Applies to all elements.

- **Import as an inline field code**

  Places the element in the main text flow as a Microsoft Word field code.

  Applies only to text elements.

- **Import as a floating text box**

  Creates a separate floating text box that you can move around the page.

  Applies only to text elements.

- **Import as an inline picture**

  Imports the image inline with the text. This is the best option for small images that fit inline with text.

  Applies only to image elements.

- **Import as a floating picture**

  Imports the image in its own floating box. This option gives you the most control over how the image appears on the page.

  Applies only to image elements.

- **Repeat header rows at the top of each page**

  Creates a running header on each page of the Word document. You can also create a running header by copying elements into the Word header.

  Applies only to List elements.

- **Number of rows to display**

  Used to fit larger reports on a page. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of rows based on the content that is being imported. For objects, including repeater tables, that have more than 32,000 rows, the content is truncated to 32,000 rows. For more information about accessing IBM Cognos content in your Microsoft Word environment, see "Techniques in Microsoft Word " on page 70.

  Applies to crosstab and list elements.

- **Number of columns to display**

  Used to fit larger reports on a page. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of columns based on the content that is being imported. For objects, including repeater tables, that have more than 63 columns, the content is truncated to 63 columns.

  Applies to crosstab and list elements.

13. Click **Next**.
14. For each report element, repeat steps 11 to 13.

    At any time, click **Finish** to accept the default settings and locations. The remaining elements use the settings from the last element that you set.

15. Click **Next**, and then click **Finish**.
16. If this is a prompted report, enter prompt answers and click **OK**.

    For information about prompted reports, see "Working with prompted reports" on page 41.

Results
The selected report elements appear in the document. Graphs and charts are imported as images.

Working with prompted reports

You can limit the data in your report by using filters. Report authors use prompts to allow users to provide input to filter and retrieve data. For example, through the use of prompted reports users can select a product type. Only products belonging to the selected product type are retrieved and shown in the report. By using IBM Cognos for Microsoft Office, users can answer prompts from imported report elements.

IBM Cognos for Microsoft Office supports prompt controls that are added to a prompt page of a report. A prompt page is like a report page.

If the report that you want to import contains unanswered prompts, the prompts are displayed before the report data is rendered. If you have set and saved default answers for the prompts, IBM Cognos for Microsoft Office uses those answers.

The following types of prompts are not supported:

- Prompts using context filters
- Prompts that are directly inserted into the report page

  These prompt controls are interactive and provide parameter values before a report is run. As a result, prompt controls added to a report page appear only when a report is run in HTML format.

- Cascading prompts that use values from one prompt to filter values in another prompt

For example, the report author created prompts for certain columns in the report, and specified that the Product type prompt is a cascading prompt that uses Product line as the cascading source. When users select a product line, they see only the product types related to the selected product line.

Related tasks
Changing prompt values

Prompt values

After you set report prompts for the first time in the IBM Cognos Viewer window and import the report into a Microsoft Office document, you can change the saved prompt values or set new values for prompts.

The default setting is **Specified Value**. If you change the server that you are reading reports from, prompted reports are returned to this default and you must manually reset the report to **Always Prompt** or **Cell Value**, even if the package and report names are identical.

When you import a report that contains prompts, the selected prompt values are saved as part of the report. Each report prompt has two values associated with it.

Table 6. Saved prompt values	
Prompt value	**Description**
Use Value	Specifies the value used by the report prompt. This value can be different from the one that is shown as the **Display Value**.
Display Value	Specifies the prompt value as a text string that is displayed in titles, labels, footers, and headers.

For all the options that are described later in this section, except for Always Prompt, when you change the Use Value setting, no corresponding change is made to the Display Value. However, you can synchronize these two property values so that they match. To indicate how you want to update the Display Value property, you must set the Prompt Update Method property. For details, see "Synchronizing the Use Value and Display Value properties" on page 45.

Specified Value

Sets the answer to the report prompt. Users must provide a prompt value, which is displayed in the **Use Value** box. The value is saved for future renditions of the Office document so that users are not prompted each time that they refresh the report.

Applies to Excel, Word, and PowerPoint.

Always Prompt

Requires the user to be prompted. The value is saved and the user is prompted each time the report is refreshed.

Applies to Excel, Word, and PowerPoint.

Cell Value

Specifies an Excel cell for the prompt value and requires that the cell reference is typed into the **Cell Reference** box, where the worksheet, column, and row location is saved for future renditions of the workbook.

Applies only to Excel.

Custom Property

Specifies the name of the user-defined custom document property that is stored with the workbook or document. The custom file property value is linked to the Use Value of the report prompt. This information

is saved for future renditions of the Office document so that you are not prompted each time that you refresh the report.

You can specify multiple values for a single prompt by assigning the values to the Microsoft Office custom file properties. Multiple values are separated by the pipe character or vertical bar (|). When the report is refreshed, all values are parsed and multiple prompts are sent to the report server. Alternatively, you can use the Cell Value property to assign multiple values. When using multiple values in a single prompt, ensure that you do not have any additional prompts of the Always Prompt type; otherwise, the multiple values are divided and returned as many prompts.

The prompt value is assigned to the custom property. If the <prompt> value is entered in the Microsoft custom document property, users are prompted the first time the report is run or refreshed, and that value is saved.

Tip: The Return Quantity by Order Method samples report in the GO Data Warehouse (analysis) package, GO Office Report Samples, is based on multiple prompt values. For more information about The Sample Outdoors Company samples, see Appendix B, "Sample reports and packages," on page 119.

Applies to Excel, Word, and PowerPoint.

Related tasks

Removing answers to prompts

Changing prompt values

After you set prompts for the first time in the IBM Cognos Viewer window and import the report into a Microsoft Office document, you can change prompt values when you refresh the reports or import additional report elements. The next time the report is refreshed, the new value is used to filter the data.

The prompt values in the following table require that you change or enter special text strings.

Table 7. Special prompt values		
Prompt value	**Description**	**Text string**
Null or empty string ()	Null values represent missing data values for the report element. For example, a new eyewear product is introduced in 2010. Therefore, there are no sales in 2009. If the report author created a report that contains the years 2009 and 2010, the values for sales of the new eyewear for the year 2009 are null (missing). Null values are displayed as blank cells in a crosstab or a list report.	`<null>`
No value	No value is selected from the list of available prompt values when the report is imported or refreshed.	`<no_value>`
Blank white space (' ')	Remains unchanged.	Blank white space (' ')

Tip: The No Data samples report in the GO Sales (query) package, GO Office Report Samples, is based on no data values for the prompts. For more information about The Sample Outdoors Company samples, see Appendix B, "Sample reports and packages," on page 119.

Procedure

1. In the IBM Cognos pane, on the **Manage Data** tab, in the **Properties** pane, expand the **Prompt** list.

   The list of parameters is displayed. The parameters are displayed only if the report author designed the report by specifying that the prompt requires user input. In this case, you must select a prompt value before the report can be run successfully.

If no list of parameters is displayed, the report author has specified prompt values to filter data. To expose these prompt values, you must open the report in Report Studio and build a Prompt Page by selecting the appropriate prompt controls.

2. Expand each of the parameters.

   Prompt values are sorted by the prompt type in the following order: **Specified Value**, **Cell Value**, **Always Prompt**, and **Custom Property**.

3. Choose how to define the prompt value for the report:

   - To define the value for a prompt, in the **Type** box, click **Specified Value**, and then, in the **Use Value** box, type the prompt answer, which is saved for future renditions of the Microsoft Office document.

   - To define the Excel cell reference for the prompt value, in the **Type** box, click **Cell Value**, and then, in the **Cell Reference** box, click the ellipsis (...) button, type the cell location, such as Sheet1!A7, and click **OK**. In the cell location that you specified, type the prompt value.

   - To prompt the user for a value whenever the report is refreshed, in the **Type** box, click **Always Prompt**.

   - To prompt the user for an initial value that is used for the same prompt in multiple reports in a document, or to define multiple values for all reports in a document, in the **Type** box, click **Custom Property**, and then, in the **Custom Property** box, type the name of the custom document property.

     If no name is provided, the program fails to retrieve the prompt value, and the Prompt window is displayed each time the report is refreshed.

     – In the Microsoft Office application, from the **File** menu, click **Properties**, and then click the **Custom** tab. In the **Name** box, select the name for the custom document property. The names in the list are derived from the **Custom Property** box **Properties** pane in IBM Cognos for Microsoft Office.

     – In the **Type** box, click the data type for the property that you want to add.

     – In the **Value** box, type the prompt answer based on the data source:

       - If the data source is dimensionally modeled relational data that does not contain a member unique name (MUN), type **<prompt>** or the prompt answer. The <prompt> string is used to open the prompt page where you can select a prompt value for the custom property prompt type.

       - If the data source is PowerCubes, copy the Member Unique Name (MUN) from the **Use Value** property box. The MUN contains the fully qualified path to where the member exists in the multidimensional structure.

       - If you want to assign multiple prompt values that are shared among all reports in a document, separate each value with a pipe character (|) to create a delimited list. The string length is limited to 255 characters. If the number and length of prompt values exceed this limit, use the **Cell Value** property to set the prompt values.

   Tip: You can use Microsoft Visual Basic for Applications (VBA) and a command-line interface to set the value of a custom document property. The API can be called within the Microsoft document using VBA to run through the list of prompt answers to get the results that you want.

Results

The values you enter are saved for future renditions of the Microsoft Office document. Users are prompted the first time the report is run or refreshed.

What to do next

In some cases, the Display Value for the prompt is not the same as the Use Value. To synchronize the values between the two prompt properties, see .

Synchronizing the Use Value and Display Value properties

When you provide a prompt value (also known as Use Value) and refresh a report, the report is filtered based on the new prompt value. However, the original prompt Display Value remains unchanged.

About this task

When the values in the Use Value and Display Value properties are mismatched or unsynchronized, you must specify how you want to manage this discrepancy.

Procedure

1. In the IBM Cognos pane, on the **Manage Data** tab, in the **Properties** pane, expand the Prompt list.
2. Expand each of the parameters.
3. In the **Prompt Update Method**, choose one of the following ways to update the prompt values after the import or refresh operation:

Option	Description
Prompt page	When the Use Value has changed, displays the prompt window during the import or refresh operation to retrieve the corresponding Display Value. The Display Value is updated to match the Use Value.
	If the prompt type is set to **Always Prompt**, the prompt page is always displayed regardless of the option selected for the **Prompt Update Method**.
Do Not Update	The Display Value is not modified when the Use Value is updated.
	Default setting
Use=Display	If the Use Value has changed during the import or refresh operation, the corresponding Display Value is changed to match the updated Use Value.

Note: If you are using automation to refresh reports, you must set the Prompt Update Method to **Use=Display** or **Do Not Update** to complete the operation. Otherwise, the report cannot be refreshed without user intervention and generates errors. In cases in which the **Use = Display** is not sufficient to update the Display Value, such as when the Use Value is a dimensional member unique name (MUN), you must manually refresh these reports.

Results

For saved prompted reports that are refreshed, the following prompt rules are applied:

- If you selected the **Use=Display** option, the Display Value is updated to match the Use Value the first time that it is modified, and the prompt value that was originally set is changed to Use Value.

- If you selected the **Prompt Page** option, the first time that you refresh the report, the Prompt page is displayed regardless of whether the Use Value has changed. The prompt value that you select sets the Use Value and Display Value properties. The original or saved prompt value of the report is set to the new Use Value.

Removing answers to prompts

Remove answers to prompts if you want users to be prompted when they open the Microsoft Office document or when they refresh data. This ensures that report content is refreshed without the last values that were entered in the prompts.

The following procedure is performed at the report level. It affects all the answers to all the prompts in the report elements that are imported into the Microsoft Office document.

Prompt answers are also cleared when you change the gateway for a prompted report.

After removing answers to prompts, you can save the workbook, document, or presentation to IBM Cognos Connection in a location where other users can access the document using their own security privileges.

Procedure

1. In the **Manage Data** tab, right-click a report.
2. Click **Remove Prompts**.

Related concepts
Prompt values

Managing pre-authored BI reports and content

IBM Cognos for Microsoft Office is fully integrated with IBM Cognos Analytics and IBM Cognos Connection. You can run reports from IBM Cognos PowerPlay Studio, IBM Cognos Analysis Studio, IBM Cognos Query Studio, or IBM Cognos Report Studio. Metrics objects can be rendered in IBM Cognos for Microsoft Office if they are defined in a report. PowerPlay Studio reports are imported as they appear in PowerPlay Studio, and not as reports that are created and formatted in PowerPlay Client. You can use IBM Cognos Analytics reports for multidimensional analysis and exploring large data sources, creating simple queries and reports, or authoring more complex ones in IBM Cognos for Microsoft Office reporting.

When you import content into IBM Cognos for Microsoft Office, the application runs reports on the report server. If your user privileges do not permit you to run some reports at some times, you cannot import content into IBM Cognos for Microsoft Office at that time either.

Report output versions

Reports are run directly against the data source so that they reflect the latest data. However, viewing the most recent data may not always meet your needs. You may want to view a report or refresh your content from older data. For example, you may want to compare monthly sales volume for a product before and after new features are added.

You may want to view saved report output versions because you do not have permission to run the reports or you do not want to rerun a report for the current period.

Report outputs are created when

- users schedule a report
- a report has multiple formats or languages
- a report has a delivery method of save, print, or email
- a report is burst

To run saved report output versions, your administrator must have selected the **Enable enhanced user features in saved output versions** option when the report version was run or saved in any of the studios. Your administrator must manually set this option for every IBM Cognos Analytics report version that requires access from IBM Cognos for Microsoft Office.

Report output versions are listed by report format, such as HTML, PDF, or XML. By default, the list contains report output versions for the language that is defined in your content locale. If no report versions are found for that language, the first report version, regardless of locale, is shown. If you have read, traverse, and execute permissions, you can choose to either view older data or run the report to retrieve the most recent content.

To run a specific output version and retrieve the most recent content, you must have execute and traverse permission for any package, model, and data source used by the report. To view a specific output version, you must have read and traverse permissions to the folders or packages that contain the reports.

If the report is a burst report, burst keys appear under **Report Selection** in the **Properties** pane on the **Manage Data** tab.

The report is run only when you refresh data and the **Version** property is set to **Run**.

Importing a report element or widget

When a report author adds new elements to a report or widgets to a workspace, you can import them as individual items to an imported report. This process allows you to import only specific elements without requiring you to reimport the entire report to retrieve data.

About this task

A report element might appear disabled on the **Manage Data** tab for one of the following reasons:

- The report author did not assign a unique name to it.

  By using the Name attribute in IBM Cognos Report Studio, report authors can label report elements using descriptive names to uniquely identify the objects.
- After you refreshed the report structure, the program detected it as a new item to the original report.

  This element appears with a star symbol in the upper left of the report object icon and is ready for import.

To use the report element or widget in your imported report, and retrieve any subsequent updates to the source data, you must import the element.

Procedure

1. From the IBM Cognos pane, click the **Manage Data** tab.
2. Expand the report or workspace that contains the new element.
3. Right-click the report element, and then click **Import Element**.

Results
If the **Check for Report Updates on Refresh Data** feature is enabled, the program checks for updates to the original report structure. If the element was deleted from the original report or workspace, a message indicates that the report element was not found in the report structure and the import process is stopped. The element or widget is removed from the report tree on the **Manage Data** tab.

Run a report in PowerPlay Studio, Analysis Studio, or Report Studio

When you run your report to retrieve data from a data source, the report runs in IBM Cognos Viewer with the default options set by the report author. From IBM Cognos Viewer, you can run the report again in the same format or in a different format. If you run the report in CSV or XLS format, the report appears in a new browser window.

From the IBM Cognos for Microsoft Office interface, you can open reports and even change report content in PowerPlay Studio, IBM Cognos Analysis Studio, or IBM Cognos Report Studio. Reports that are first created in PowerPlay Studio and then formatted in PowerPlay Client are displayed as they appear in PowerPlay Studio.

You can make changes and save the results to the IBM Cognos Connection portal. New or updated reports are then available to other users through IBM Cognos Connection or IBM Cognos for Microsoft Office.

If you are in IBM Cognos for Microsoft Office and you view a report in the Excel format using Internet Explorer in IBM Cognos Analytics, the IBM Cognos pane in IBM Cognos for Microsoft Office is hidden by other Excel objects. To avoid this, you must open Microsoft Office documents in their native applications instead of using Internet Explorer. To show the IBM Cognos pane, you can click the **IBM Cognos** button on the IBM Cognos toolbar. Or, from the **Tools** menu, click **Customize** and select the **IBM Cognos** check box.

If you are viewing a report in Excel or CSV format, you can save the output of the report only to the file system. You cannot save it to IBM Cognos Connection from IBM Cognos Viewer. In this case, you can close IBM Cognos Viewer, and publish the report output from IBM Cognos for Microsoft Office.

Procedure

1. In IBM Cognos for Microsoft Office, click the **Browse Content** tab or the **Manage Data** tab.
2. View a report:
   - On the **Browse Content** tab, click a report, and then click **View Report**.
   - On the **Manage Data** tab, right-click a report name, and then click **View Report**.
3. If you are prompted to specify the range of data included in the report, select the values from each field, and click **OK**.

   The report runs in IBM Cognos Viewer.
4. If you want and are licensed to do so, you can change the report by accessing Analysis Studio or Report Studio.
5. After you finish viewing or changing the report, in the upper-right corner, click **Close**.
6. If prompted to save the report, click **Save**.

Results

You may view or change another report or select the report that you just edited to import it into the Microsoft Office document. After changing report options, you may need to refresh report data. For more information, see "Refreshing report data and formatting" on page 19.

View or run report output versions

You can analyze older data in a report by viewing previous report output versions. You can view the most recently saved copy of a report in IBM Cognos Viewer or run it if it was not previously run.

A report output is a snapshot of the data that is current only up to the time that the report is saved. You can view all versions of a report output, including the date, format, and language of each report output.

Depending on the properties set for the report versions, each time that you use the **Refresh All Data** command, you either view an output version of the report or update the imported report with the most recent data.

Before you begin

To run saved report output versions, your administrator must have selected the **Enable enhanced user features in saved output versions** option when the report version was run or saved in any of the studios. For more information, see "Report output versions" on page 46.

You must have read and execute permissions for a report that you want to run and traverse permissions for the folder that contains the report.

Procedure

1. In IBM Cognos for Microsoft Office, click the **Manage Data** tab.
2. Click the report that you want to update or whose output versions you want to view.
3. In the **Properties** pane, expand **Report Selection**, and then click the **Version** property.
4. Choose whether you want to run or view a report:
   - To import changes since the last stored version or run the report if it was not previously run, click **Run**.

     This option is available only if you selected the option to run the report when you imported it.
   - To view the most recently saved output version of the report, click **Most recent**.

- To view a specific report output version, click the desired version.

Results
If you chose **Run**, the next time that you use the **Refresh All Data** command, the report is updated with the most recent data. If you chose a specific output version, the **Refresh All Data** command retrieves data that was available when the report was last saved.

Verify or change properties for imported data

You can identify the source of data in the Microsoft Office document, and the last time that the data was updated. Verifying properties helps you ensure that you are working with the latest version of the right data.

You can verify or change values for these Report properties.

Table 8. Report properties	
Property	**Description**
Name	The name of the imported report.
	If a report with the same name exists in the document, you can change the name to distinguish it from other reports.
Last Refreshed	The date and time when the report was last updated with the most recent content changes.
System	The URI that is the address to the IBM Cognos Analytics gateway.
Search Path	The search path that shows the fully qualified location of the report in the IBM Cognos Analytics content store.
Version	The property values related to the report output versions available on the IBM Cognos Analytics server.
	If set to **Run**, the report result is current as of the last time that it was refreshed. The next time that the specified report version is refreshed, the most recent data is retrieved.
	If set to a date and time, the report result is current as of the timestamp. The next time that the report is refreshed, the result from the selected output version is retrieved. This data might be older than what is currently available in the content store.
	For more information, see "Managing pre-authored BI reports and content" on page 46.
Burst Key	The dimension or level of a query in the report specification that is used to create, or burst, a set of report results.

You can verify values for these report element properties.

Table 9. Report element properties	
Property	**Description**
Name	Name of the imported report element.

Table 9. Report element properties (continued)	
Property	**Description**
Element ID	The unique identifier for the imported report element to be reused, usually to take advantage of any applied formatting.
Last Refreshed	Date and time when the report element was last retrieved from the content store.

You can verify or change values for these report prompts properties.

Table 10. Prompt value properties	
Property	**Description**
Cell Reference	In the Microsoft Excel worksheet, identifies a cell or range of cells on a worksheet where the prompt value is referenced.
Custom Property	References a Microsoft Office custom document property with a user-defined value that is copied to the Use Value property.
Display Value	Specifies the prompt values as a text string that is displayed in titles, labels, footers, and headers. This value is read-only. You cannot manually change it.
Type	Specifies how the prompt value is captured and saved in the Microsoft Office document. You can select from Specified Value, Cell Value, Always Prompt, and Custom Property. For details, see "Prompt values" on page 42.
Use Value	Specifies the value used by the report prompt to filter data. This value can be different from the value shown as the Display Value.
Prompt Update Method	If the Use Value has changed when the data is refreshed or new elements are imported, specifies how the Display Value for the current report prompt is updated.

Procedure

1. In IBM Cognos for Microsoft Office, click the **Manage Data** tab.
2. Expand the hierarchical list and click a report.
3. In the **Properties** box, expand the **Report** or **Report Selection** group and verify or change the property values.
4. For a report element, such as a header, in the **Properties** box, verify the property values.

Results

After you verify the settings or make your changes, you may choose to refresh the content. For more information, see "Refreshing report data and formatting" on page 19.

Refreshing all imported reports in a Microsoft Office document

You can retrieve the latest data updates for all the reports in a Microsoft Office document to ensure that you are working with the latest version. Updates can also be retrieved for report output versions and scheduled reports.

Before you begin

To update a specific report output version with the most recent data, set the report property **Version** on the **Manage Data** tab to **Run**. For a burst report, the burst key set during the import dictates which version of the report is updated. To change the burst key, select the new key from the **Burst Key** property on the **Manage Data** tab.

About this task

When you use the **Refresh all Data** command, you can also update any formatting that was applied by the report author in the IBM Cognos studio. If you have enabled the **Check for Report Updates on Refresh Data** option, the program also checks for any changes to the report structure since you last imported the report. For details on how to set this option, see "Checking for updates to the report structure" on page 26.

If you update only the source data, any formatting applied from the Microsoft Office application remains unchanged. If you refresh the source data and the report formatting, the latest updates are retrieved, including formatting characteristics such as cell color and number formatting applied to the original report in the IBM Cognos studio. If you have customized cell formats, the refresh process changes the Microsoft Office custom formatting to the current report formatting as designed by the author.

Procedure

1. On the IBM Cognos toolbar, click the Refresh all Data icon .
2. Select how you want to update all the reports in the Microsoft Office document:
   - If you want to retrieve updates to only the source data, click **Refresh the data only**, and click **Yes**.
   - If you want to retrieve updates to the source data and any formatting changes, click **Refresh the data and report formatting**, and click **Yes**.
3. Optional: If you enabled the **Check for Report Updates on Refresh Data** feature, and changes to the report structure are detected, at the prompt, click **Yes** to retrieve the most recent changes:
   a) To view the list of report elements that were added to or removed from each original report, click **Show Details**. Report elements, such as footer, header, body, or page, that were moved from one part of the report to another part of the report are also updated; however, these elements are not included in the list.
   b) In the confirmation window, click **Refresh Data** or **Refresh Data and Formatting**.
   c) If you do not want to check for report updates, click **No** to continue with the refresh process.

   The report structure is first updated and then data or data and formatting for all reports in the document are updated.

Results

All the reports in the workbook, document, or presentation are updated. If you are a burst recipient, you see only the data that is meant for you. Any report for which data was converted to static text or numeric data remains unchanged.

Report elements that were identified as missing since you last imported the report are converted to stand-alone elements and appear on the report tree with a strikethrough character. There is no link between the data in the document and the report that the data is based on. The next time that you refresh the report, these report elements or widgets are removed from the report tree. Conversely, report elements that were identified as missing, but were not previously imported, are automatically removed from the report tree on the **Manage Data** tab.

The results of the **Refresh All Data** command differ based on whether you are running a report or viewing a report output version. For more information, see .

What to do next

In Microsoft Excel, refreshed data can exceed the target range in the workbook, overwriting existing cell contents or named ranges. If the refreshed data exceeds the target range, you must move existing named ranges to create an acceptable row or column range for the updated report data.

If new report elements were detected during the refresh process, you must manually import these elements to include them in the current report.

The elements are displayed in the report tree on the **Manage Data** tab and are identified with a star symbol in the upper left of the report object icon. Elements that were added to the report specification, but do not have unique identifiers, cannot be imported.

Refreshing a report, report element, or widget

You can retrieve the latest data updates for a report, a report element, or a widget in a Microsoft Office document to ensure that you are working with the latest version.

About this task

When you use the **Refresh Data** and **Refresh Data and Formatting** pop-up menu commands, you can update only the source data or update the source data and any formatting that was applied by the report author in the IBM Cognos studio. If you have enabled the **Check for Report Updates on Refresh Data** option, the program also checks for any changes to the report structure since you last imported the report or report element.

If you refresh the source data, any formatting applied from the Microsoft Office application remains unchanged. If you refresh the source data and the report formatting, the latest updates are retrieved, including formatting characteristics such as cell color and number formatting applied to the original report in the IBM Cognos studio. If you have customized cell formats, the refresh process changes the Microsoft Office custom formatting to the current report formatting as designed by the author.

Procedure

1. From the IBM Cognos pane, click the **Manage Data** tab.
2. Choose how you want to update a report element or the report in your document:

    - If you want to retrieve updates to source data for a report, right-click the report, and then click **Refresh Data**.

      If you want to retrieve updates for a report element or widget (list, crosstab, or image), expand the report or workspace, and then right-click the element to display the pop-up menu.

    - If you want to retrieve updates to source data and changes to formatting for a report, right-click the report or workspace, and click **Refresh Data and Formatting**.

      Note: If you want to retrieve updates for a report element or widget (list, crosstab, or image), expand the report or workspace that contains the element, and then right-click the element to display the pop-up menu.

3. `Optional:` If you enabled the **Check for Report Updates on Refresh Data** feature, and changes to the report structure are detected, click **Yes** to retrieve updates to the report structure.

    a) To view the list of report elements that were added to or removed from each original report, click **Show Details**.

      Report elements that were moved from one part of the report, such as footer, header, body, or page, to another part of the report are also updated; however, these elements are not included in the list.

    b) In the confirmation dialog box, click **Refresh Data** or **Refresh Data and Formatting**.

    c) If you chose not to check for report updates, click **No** to continue with the refresh process.

The report structure is first updated and then data or data and formatting for the report, report element, or widget is updated.

Results
The report or report element is updated. If you are a burst recipient, you see only the data that is meant for you. If the data in a report was converted to static text or numeric data, the data remains unchanged.

If the report element has been removed from the original report or if the widget has been removed from the original workspace, it is converted to a stand-alone element in the Microsoft Office document. That means that there is no link between the data in the document and the report on which that data is based.

Refreshing the structure of a report or a workspace

Retrieve updates to the structure of a report or report element to reflect its status on the IBM Cognos report server. You can also retrieve updates for widgets in workspaces that are built in IBM Cognos Workspace.

About this task
You can refresh the structure of the report without updating the source data. If you know that the report author has changed the structure of a report or a workspace, retrieve the latest changes to include them in the Microsoft Office document. A report element might not display in a previously imported report because the report author has performed one or more of the following tasks:

- Added the new element to the report specification
- Added or changed the existing name of the report element
- Removed the existing element from the report specification
- Removed the existing name of the report element

The new report element is not displayed in the report tree until you refresh the report structure. When you refresh the report structure, any new or changed report elements are identified. A star symbol is displayed in upper left of the report object icon to indicate that the report element has a unique name. The added report element is available for import during the current session.

Procedure

1. From the IBM Cognos pane, click the **Manage Data** tab.
2. To update a report or a workspace, right-click the object, and then click **Refresh Report Structure**.
3. If new or deleted elements are detected, click **Show Details** to view the list of elements or click **Yes** to proceed.

Results
A message is displayed if no changes are found in the report on the IBM Cognos report server.

What to do next

If an element is found to be missing from the original designed report, it is converted to a stand-alone element in the Microsoft Office document. That is, the data in the document is no longer connected to the report on which that data is based. On the **Manage Data** tab, the element is identified with a strikethrough character. If this element is no longer required for your report analysis, you can remove it at any time during your session using the Microsoft Office commands.

If a new element is found, it is added to the report tree on the **Manage Data** tab as disabled. To include the new element in your report, you must manually import it. When the new report element is imported, you can refresh it to retrieve subsequent updates to the source data.

Refresh a folder

When you log on to a namespace, the Public Folders and My Folders in the IBM Cognos pane that contain any reports or analyses are cached during your session. When the state of a folder changes during the current session, users who have access to the folder are affected. For example, when the folder is deleted, it cannot be accessed.

You can refresh the list of folders that are visible in the **Browse Content** tab of the IBM Cognos Office pane.

Procedure

1. In IBM Cognos for Microsoft Office, click the **Browse Content** tab.
2. Right-click a folder that you want to refresh, and click **Refresh Folder**.

Results
The content server is polled for changes and refreshes the IBM Cognos content tree node.

Remove a report or data from a Microsoft Office document

You can remove reports, specific report elements, data, or reports and data from a Microsoft Office document.

Removing a report breaks the link between the data in the document and the report specification on which that data is based. The data of the report persists in the Office document. In Microsoft Excel, the workbook becomes static and can be used like any other workbook.

Removing data clears the workbook, slide, or document. Removing a report and data completely deletes the report and data from the document.

In PowerPoint and Word, using the **Delete** key to delete an object also deletes the link for that object to IBM Cognos for Microsoft Office. To clear content, such as data or an image from the document, you must use the **Remove Data** option on the **Manage Data** tab. Using this method, you can clear the image and leave a placeholder for the content to be refreshed later.

For Microsoft Excel, the **Delete** key affects only charts and images.

Procedure

1. In the IBM Cognos pane, click the **Manage Data** tab.
2. Right-click the report or report element that you want to remove and then click the remove option that you want from the following.

Option	Description
Remove Element or Remove Report	Breaks the link between the data in the document and the report on which that data is based A rich text element and its associated subelements are imported as a discrete item. When a rich text item is removed, all of its subelements are removed.
Remove Data	Clears the data from the document while maintaining a connection to the data source
Remove Element and Data	Completely deletes the element and data from the document
Remove Report and Data	Completely deletes the report and data from the document

Searching for reports or report content

IBM Cognos for Microsoft Office includes two modes for searching content: enhanced search, and name and description searches.

Enhanced search (full-text)

Before implementing the enhanced search, you must install and configure the IBM Cognos Workspace components in the existing IBM Cognos Analytics environment. The components can be on a different computer from Content Manager.

Use the extended search to perform full-text searches of content published to IBM Cognos Analytics. The search examines the full content of the document, and not just the titles. For example, if you search on customer name, products, locations, or any other search criteria, the results are not just based on whether these things appear in the document name, but when and where they appear in the content.

Searches automatically include word variations. For example, if you type the word tent as the search term, the search results show entries that include tent and tenting. Words that contain tent, such as retention are not included in the results.

The results for searches that use multiple words include entries that include all search terms, and entries that contain only one of the search terms. You can use search operators such as + (plus), - (minus), or " " (quotation marks) to modify the default behavior when searching using multiple words.

IBM Cognos Analytics security settings apply to search results. Only content to which a user has access appears in the search results.

Name and description search

Use the name or description search to search for reports whose name, description, or both match the string entered in the search criteria.

The following table shows examples of search criteria and results.

Table 11. Search methods

Method	Search criteria	Results
Contains the exact string	Revenue A	Revenue A
		Revenue ABC
		Copy of Revenue A
Starts with the exact string	revenue	revenue A
		Revenue ABC
Matches the exact string	Revenue	Revenue
		revenue

Searching for report content based on full text

You can perform full-text searches of content published to IBM Cognos Analytics. The search examines the full content of the document, and not just the titles.

Procedure

1. In the IBM Cognos pane, click **Search**.

2. In the **Server** box, click the IBM Cognos Analytics server that contains the content that you want to include in the search results.

3. In the **Search** box, click the **Full text** link.

4. Click the search button .

   The **Result** pane shows results that are ranked with the most relevant content at the top of the list.

Results

The reports that match the criteria and that you have permissions to view, appear in the **Result** pane.

Searching for reports based on names or descriptions

You can search for reports or report content based on names or descriptions. Use the name or description search to search for reports whose name, description, or both match the string entered in the search criteria.

Procedure

1. In the IBM Cognos pane, click **Search**.

2. In the **Server** box, click the IBM Cognos Analytics server that contains the reports that you want to include in the search results.

3. In the **Search** box, click the applicable link for searching on name, description, or both.

4. In the **Search** box, type the phrase that you want to search.

5. In the **Method** box, choose the type of match between the search string and the results:

   • To return entries that include the search strings somewhere in the name or description, click **Contains the exact string**.

   • To return entries whose name or description begins with the search string, click **Starts with the exact string**.

   • To return entries whose name or description matches the search string word for word, click **Matches the exact string**.

6. In the **Modified** box, click the date that the report was last modified.

   For example, if you want the search to return reports that were updated in the last week, click **In last week**.

7. In the **Scope** box, click the folders that you want to include in the search.

8. Click the search button.

Results

The reports that match the criteria and that you have permissions to view, appear in the **Result** pane.

Save a document created using IBM Cognos for Microsoft Office

You can save documents that you create using IBM Cognos for Microsoft Office with or without data. If you save the document with data, the data is not refreshed on opening the document. You must refresh the data manually.

Saving documents without data can enforce best practices, such as refreshing data upon opening the document and respecting security. By saving documents with data, users without IBM Cognos for Microsoft Office and users not connected to the network can view numbers.

Procedure

1. Choose whether to save the document with data:

- To save the document with the most up-to-date data, on the **Manage Data** tab, right-click the report, and then click **Refresh Data**.
- To save the document without data, on the **Manage Data** tab, right-click the report, and then click **Remove data**.

2. From the **File** menu, click **Save**.

Open IBM Cognos Connection from a Microsoft Office application

IBM Cognos Connection is the portal to IBM Cognos Analytics and provides a single access point to all corporate data available in IBM Cognos Analytics. You can use IBM Cognos Connection to work with entries such as reports, analyses, queries, agents, metrics, and packages. You can also use it to create and run reports and cubes, and distribute reports.

Procedure

1. In the IBM Cognos pane, click the **Browse Content** tab.
2. Right-click a folder that contains the packages, reports, or analyses that you want to use in IBM Cognos Connection, and click **Open Folder**.

Results

The folder or report that you selected appears as an entry in the IBM Cognos Connection portal. You can use any of the studios for further analysis and exploration.

Chapter 6. Try it yourself exercises

The exercises in this chapter are for those who have some experience with IBM Cognos for Microsoft Office and want to improve their skills in embedding elements of reports in Microsoft Office products. Each topic gives you guidelines on how to create a sample workbook, presentation, or Word document from pre-defined or modified IBM Cognos reports. If you need help, links to more detailed instructions are available.

Microsoft Excel exercises

IBM Cognos for Microsoft Office allows you to import a wide range of IBM Cognos Analytics content into Microsoft Excel, including complex business, production, managed, and workspace reports. You can also import individual elements such as crosstabs, graphs, charts, and tables and multiple heterogeneous queries with contextual information.

As users update Cognos Analytics data, you can automatically refresh dependent workbooks. For example, you are not required to redistribute reports when data changes. To get the latest information, you simply refresh the workbook that you already have.

Use the formatting and capabilities in Excel, including native charts, and standard corporate templates and layouts that are preserved when data is refreshed. You can add comments explaining data, and calculations in Excel.

Import a list report

Use list reports to show detailed information from your database, such as products lists and customer lists.

In this topic, you learn how to

- import IBM Cognos content or IBM Cognos report elements into the Microsoft Excel workbook.

  The sample list report, Sales Growth Year Over Year, shows annual sales growth in both percentage and dollar amounts.
- apply custom formatting
- refresh data
- refresh after removing data in a report

It should take 20 to 25 minutes to complete this topic.

Importing IBM Cognos content

You can import IBM Cognos content or IBM Cognos report elements into a Microsoft Excel workbook.

Procedure

1. Select the **Browse Content** tab.
2. Import the **Sales Growth Year Over Year** report from **Go Data Warehouse (analysis)**, **Report Studio Report Samples**.
3. In Excel, for the **Revenue** column, create a custom number format for **$#,##0,K**, and add it to the list of custom number formats.
4. Apply the custom number format to the **Revenue** column.

Refreshing data and formatting

You can refresh the data in a report contained in a Microsoft Excel workbook.

Procedure

1. Change the revenue for **Camping Equipment** to $600,382,422.83.
2. Click **Refresh All Data**.

   You can refresh the data or both the data and report formatting. If you select **Refresh the data and report formatting** both the recent data and formatting styles that are part of the report specification are retrieved from the content store. Any changes that you made to data and formatting styles in Excel are overwritten.

Removing data and refreshing a report

You can remove data from a report in a Microsoft Excel workbook and refresh it.

Procedure

1. Select the **Revenue** column and apply the custom number format ($#,##0,K) that you created for this exercise.
2. For the 2005 **Outdoor Protection**, change the revenue to 43,008,578.
3. From the **Manage Data** tab, right-click the **Sales Growth Year Over Year** report and click **Remove Data**.

   The worksheet is cleared of the report and data.
4. From the **Manage Data** tab, right-click the **Sales Growth Year Over Year** report and click **Refresh Data and Formatting**.

   The worksheet is populated with recent data and formatting from the content store.
5. Use the Excel **List** command to sort or filter your data.

Results
For more information, see

- "Import IBM Cognos report elements into Microsoft Excel" on page 34
- "Refreshing report data and formatting" on page 19
- "Remove a report or data from a Microsoft Office document" on page 54

Create an Excel list to narrow the focus of a report

In Excel, you can use the **List** command to sort, filter, and total data in rows and columns. In IBM Cognos for Microsoft Office, you can import the rows of a report as a list by selecting the **Import as an Excel List** check box in the **Import Content** wizard.

These orderly rows of data can include items such as names of staff or products, quarterly sales amounts, or addresses. When the data is a list, each column in the list has AutoFilter arrows in the heading cell for each column. The outline around the list indicates the range of cells contained in your list, and distinguishes one list from another list, and helps you to identify list data from other worksheet data.

In this topic, you learn how to quickly filter the IBM Cognos Analytics data using the Excel **List** command.

The sample report, 2005 Sales Summary, summarizes revenue and gross profit for 2005, and shows the top sales representatives by revenue and quantity sold. Your focus is on Central Europe, but you will also filter the report to show the top representative who sold over 320,000 quantities, highlighting those in the Americas region.

It should take 5 to 10 minutes to complete this topic.

Procedure

1. Select the **Browse Content** tab.
2. Import the **2005 Sales Summary** report from **Go Sales (analysis)**, **GO Office Report Samples**.

For the list element, select the **Import as an Excel list** and the **Automatically resize columns** options.

The report includes the AutoFilter arrows at the top of each column.

3. In Excel, use the AutoFilter feature to narrow the focus of the **Quantity** column to show only quantities over 320,000, and then apply conditional formatting to highlight the **Americas** region.

Results

For more information,

- on the **List** command, see the Microsoft Excel online help.
- on the **Conditional Formatting** command, see the Microsoft Excel online help. For more details, see "Import IBM Cognos report elements into Microsoft Excel" on page 34

Import a burst report and hide worksheets for burst recipients

When report authors burst a report, users can run a report once and divide the results for distribution to multiple recipients. Each report recipient sees only the subset of data to which they have access. You can distribute burst reports by email, save to a directory for viewing in IBM Cognos Connection, or both.

IBM Cognos Analytics recipient users can use IBM Cognos for Microsoft Office to import burst reports.

In this topic, you learn how to

- show sales targets for each sales representative on a single worksheet

  The sample list report, **Bursted Sales Performance Report**, shows how the product sales report is bursted to a sales manager for Northern Europe sales staff.
- hide worksheets so that only some burst recipients see the information
- protect the workbook so that access to the hidden worksheets is restricted

  Important: Hiding, locking, and protecting a workbook and worksheet is not intended to help secure or protect any confidential information that you keep in a workbook. It helps to only obscure data or formulas that might confuse other users and prevents them from viewing or making changes to that data.

It should take 10 to 15 minutes to complete this topic.

Procedure

1. Select the **Browse Content** tab.
2. Import the **Bursted Sales Performance Report** report from **GO Data Warehouse (query)**, **GO Office Report Samples**.
3. When importing the report, create a new worksheet for each report page, ignore the formatting for the headers, and automatically resize the columns for your list element.

   The sales target for each representative appears in a separate worksheet.
4. Hide the worksheets for **Hester Uhlenbroek (Bursted Sa Page 1-3)** and **Lovisa Svinhufvud (Bursted Sa Page 1-5)**.

   Note that the sheets labeled **Bursted Sa Page 1-3** and **Bursted Sa Page 1-5** are not shown.
5. Protect the structure of the workbook.

   Locking the structure of a workbook prevents users from

   - viewing worksheets that you have hidden
   - moving, deleting, hiding, or changing the names of worksheets
   - inserting new worksheets

   You can also hide a worksheet so that it can only be recovered using VBA code, and then protecting the project or the Visual Basic Editor with a password.

Results

For more information, see

- Import IBM Cognos Report Elements into Microsoft Excel
- For help on hiding worksheets and protecting workbooks, see the Microsoft Excel online help
- For help on protecting the visual basic code or macros, see Microsoft Visual Basic help.

Microsoft PowerPoint exercises

Microsoft PowerPoint allows you to visually organize and communicate performance targets and business results, or what is driving delivery performance and service levels.

Compile reports into a presentation

Each slide in the presentation can represent a specific report, or it can be a combination of different report elements, such as lists, crosstabs, or charts from multiple reports.

In this topic, you learn how to create slides for a PowerPoint presentation that highlights sales revenue for the Sample Outdoors Company.

It should take 20 to 25 minutes to complete this topic.

Procedure

1. To create the slides, open PowerPoint.
2. For the Sales Review presentation, use the Default Design.pot template as the slide design.
3. Use the **title, content, text** slide layout.

   For the logo, use the logo_great_outdoors.gif from the samples folder installed with the IBM Cognos Analytics products.

   The samples default location is
   `installation_directory\cognos\ibmcognos\webcontent\samples\images`
4. In the title box, type `Great Outdoors Company`.
5. In the text box, type **Sales Review**.
6. To create slide 2, select the **Browse Content** tab.
7. Import the **2005 Sales Summary** report from **Go Sales (analysis)**, **GO Office Report Samples**.
8. When importing the report, create new slides for report pages and insert this slide after slide 1.
9. Clear all headers and footers, and select to import only the **Combination Chart11111**.
10. Type the following title:

    `Revenue by Product Line`
11. Add a footer to all slides that includes the slide number.

    Ensure that the title slide (slide 1) does not include a slide number.
12. To create slide 3, select the **Browse Content** tab.
13. Import the **2005 Sales Summary** report from **Go Sales (analysis)**, **GO Office Report Samples**.
14. When importing the report, create new slides for report pages and insert this slide after slide 2.
15. Clear all headers and footers, and select only the **List 1111** and **List 2111** elements.
16. Type the following title:

    `Top Sales Staff`
17. Move the top sales staff table before the top 10 sales staff table.
18. In a text box before the top sales staff table, type `Top Sales Staff by Quantity Sold`.
19. In a text box before the top 10 sales staff table, type `Top 10 Sales Staff (% Over Target)`.
20. In a text box before the top 10 sales staff table, type `Top 10 Sales Staff (% Over Target)`.

21. To create slide 4, select the **Browse Content** tab.
22. Import the **2005 Sales Summary** report from **GO Sales (analysis)**, **GO Office Report Samples**.
23. When importing the report, create new slides for report pages and insert this slide after slide 3.
24. Clear all headers and footers, and select only the **Combination Chart 211** and **Combination Chart 311**, **Combination Chart 411**, and **Combination Chart 21** elements.
25. In the title box, type Revenue by Territory.

    Move the charts so that they are not overlapping and have a professional appearance.

Results

You have compiled reports into a Microsoft PowerPoint presentation.

Chapter 7. Best practices and guidelines

IBM Cognos for Microsoft Office provides a wide variety of options. These options can be an area of uncertainty for report consumers who must make numerous decisions when choosing how to lay out a report for consumption and analysis. This section provides guidelines to make these decisions easier, and outlines our recommendations for importing IBM Cognos Analytics reports and authoring custom reports within the Microsoft Office applications.

Using IBM Cognos for Microsoft Office

In IBM Cognos for Microsoft Office, you can include business intelligence content in your presentations or documents and update the content in the Microsoft Office applications. IBM Cognos for Microsoft Office provides the following benefits:

- augmenting the business intelligence data with commentary or explanations
- illustrating written information
- bringing together business intelligence content from other sources
- collating elements of diverse reports into a single presentation or document

Limitations

IBM Cognos for Microsoft Office helps you take advantage of the various layout capabilities in the Microsoft applications. It does not replicate the specific layout and formatting of the source IBM Cognos Analytics reports.

IBM Cognos for Microsoft Office does not include the report production capabilities that are available in IBM Cognos Connection or IBM Cognos Viewer. For example, you cannot schedule or burst reports from any of the Microsoft applications. However, you can use the capabilities in Microsoft Office to manage and distribute the IBM Cognos Analytics content that best suit the needs of the organization. To achieve distribution functionality similar to IBM Cognos Connection or IBM Cognos Viewer, you must use custom scripting. For more information, see Chapter 8, "Automating IBM Cognos Office," on page 73.

Report design

When importing IBM Cognos Analytics content, you decide which elements to import and how to arrange them on the page, worksheet, or slide. There are key areas that affect the final display and functionality of your reports.

A report consists of three main areas: the header, the footer, and the body.

- The headers and footers may include text, such as page numbers, or images.
- The body includes report types such as lists, crosstabs, charts, maps, or repeaters. It is important to understand how report elements behave if they grow and displace other elements. The report elements may grow either horizontally or vertically, depending on repeaters or repeater tables, content size, and rendering-specific reasons, such as font substitutions.

Recommendation - limit chart metadata

Limit chart metadata in image maps to what can be seen as a static image.

Microsoft Excel Microsoft PowerPoint, and Microsoft Word do not support image maps. Charts are imported as images and do not have the context sensitivity and data values that appear when that same image map is viewed in IBM Cognos Analytics.

For Word and PowerPoint, we recommend that you create images with transparent backgrounds so that they take the background color of the page or slide.

Recommendation - add report objects

In the **Manage Content** tab on the IBM Cognos pane, you can click items and see how they are positioned in the workbook. You can refresh individual objects by clicking the report and expanding the list and then right-clicking the report element.

To make multiple copies of an item, it is better to import the item again and place it in the Microsoft Office document. Report elements have different behavior based on object type.

Report design tips

This section provides general information, best practices, and tips for importing report elements and then designing customized reports. It is intended to provide a starting point for design questions and is an overview of the capabilities of IBM Cognos for Microsoft Office.

Layout principles

The way in which text, tables, and other objects are laid out onto the pages of the various Microsoft Office applications can be described as a specific layout model in the application that creates the document.

For example, the layout model for Excel is the cells, which are treated as a single, large table. For PowerPoint, the layout model is the canvas style in which layout objects are placed at x and y coordinates that may result in overlapping objects with no flow beyond the page. For Word, the layout model is a flow-based style in which text and objects are placed one following the other, breaking into new lines and pages when they flow beyond the page or when certain rules are applied.

Importing IBM Cognos Analytics report layouts

The layout model in IBM Cognos Report Studio closely resembles the flow-based model used in Word. As such, flow-based IBM Cognos Analytics reports translate well when imported into Word. However, IBM Cognos Report Studio also supports objects that are embedded within a list or crosstab. Report authors use these complex layouts to control where objects appear in the report.

When these embedded objects are converted to tabular representation, they are not rendered in the same way as when they appeared in Report Studio. IBM Cognos for Microsoft Office does not import tables that are used as container objects. If the layout structure is complex, the import process may not correctly render the embedded tables. For example, the import could result in report elements that are hidden by outer table borders or in data that is displaced to an incorrect column.

In both Excel and PowerPoint, neither the flow-based model nor the embedded objects are rendered properly. You must use the tools available in these applications to lay out objects in your reports. This means that in Excel, you must tie the objects to a cell, and, in PowerPoint, you must arrange the objects on a canvas.

Recommendation - protect user access to data

Create and manage your Microsoft Office templates for a wide variety of users.

For example, for regional sales managers, you can create a master template that contains all your corporate data.

Use the **Remove Data** pop-up command from the **Manage Data** tab to clear the document of secure data items. Publish the document to IBM Cognos Connection and give each manager access to the document. When the data is refreshed, each regional manager only sees the data for his or her region.

Recommendation - publish data with fixed content

Publish data with fixed content to prevent changes from the content store. You can send the Microsoft Office document to someone who does not have an IBM Cognos for Microsoft Office component installed or does not have a license for it.

Remove the link between the Microsoft Office document and IBM Cognos for Microsoft Office.

Use the **Remove Report** function if you want to present part of the Microsoft Office document with fixed data. In this case, you could add fixed corporate data that all regional managers should view to the master workbook, presentation, or document. Then you can delete the link from the report to the document while leaving the common data in the cells, slide, or document.

Recommendation - avoid nesting objects

Although you can import repeaters, repeater tables, and objects in conditional blocks, list objects embedded within list objects may cause problems due to the limitations of the target Microsoft application. For example, the rendering of the report could result in report elements that are hidden by outer table borders or in data that is displaced to an incorrect column.

The report author must design reports that are optimized for your Microsoft Office integration needs. That means ensuring that there is minimal formatting so that Office users can more easily use Microsoft Office formatting capabilities with the IBM Cognos content.

Recommendation - maintain table size to a minimum

All of the supported Microsoft Office applications impose restrictions on the number of rows that they can create and effectively show. For example, the original maximum size for a table in PowerPoint 2003 is 25 rows by 25 columns and for PowerPoint 2007 and 2010, 75 rows by 75 columns. Although you can add rows, the expanded table may not display correctly on a single slide.

The following conditions restrict the number of rows and columns of a cross tab or list report rendered in the Microsoft Office application:

- The size limitations imposed by the Office application
- The setting specified for the **Number of rows to display** and **Number of columns to display** option in the **Import content** wizard.

While any of these conditions exist, the query sent to the IBM Cognos Analytics server is a request for the entire list or crosstab report. The request to retrieve all report data for a large-scale report can slow down the performance of the Microsoft application or IBM Cognos for Microsoft Office, and cause the program to stop responding.

Each request to the server uses more memory; therefore, the Microsoft Office application will lack memory for its own use. If the requests use too many resources, they can significantly degrade performance.

For effective use of PowerPoint and Word, maintain the size of the tables to comply with restrictions in the Microsoft Office application. In the Microsoft Word environment, tables are limited to 32,000 rows and 63 columns. For all the Microsoft applications, large tables affect performance during an import operation. For example, you might experience performance degradation when importing tables with over 1,000 rows into Microsoft Word .

Recommendation - define image properties

Do not rely on the report context, such as row height or column width, to define the size of images.

The report author must explicitly specify the height and width of the image.

Techniques in Microsoft Excel

You can apply best practices to access IBM Cognos Analytics content and customize reports in your Excel environment.

Recommendation - reference records in large worksheets

You may want to reference records in large Excel worksheets.

If you insert rows and columns into the middle of imported report tables after a refresh, the inserted rows and columns are overwritten or will not necessarily line up.

It is better to import report tables into a data worksheet and then access that data with horizontal (HLOOKUP) and vertical (VLOOKUP) lookup functions to supply summary data in another part of the workbook. Use VLOOKUP to search through one or more columns of data, and use HLOOKUP to search through one or more rows of data.

If you want the lookup functions to return exact matches, you must sort the values in your table array in ascending order.

For more information, see the Excel *Online Help*.

Recommendation - refresh data without formatting

Format content in Microsoft Excel using data formats.

If formatting is applied to cells and the refreshed data shifts, the cell formatting does not move to the new location. This can change the meaning of data.

If you use extensive formatting, refresh data without formatting so that the changes you make are not overwritten by formatting changes in the original report.

Note: While you can copy or move imported elements between worksheets by using Windows Copy and Paste commands, you cannot properly refresh the source data on the copied content. Similarly, you cannot refresh content on a new worksheet that was copied from an existing worksheet. The report elements on the copied worksheet are no longer linked to the source data. You must reimport the report or report element on the new worksheet to properly refresh the source data.

Report rendering

You should be aware of some of the unique limitations of Microsoft Excel that affect the rendering of pre-authored IBM Cognos Analytics reports.

Maximum number of pages in long reports

To prevent Microsoft Excel from generating an error, keep track of the number of pages in lengthy reports.

Microsoft Excel can support a maximum number of worksheets per workbook, limited by available memory. If the report pages exceed that limit, Microsoft Excel generates an error.

When you import report elements from IBM Cognos Analytics, you can choose the **Create new worksheets for report pages** option in the **Import Content** wizard. When you choose this option, each page in a report becomes a worksheet in Excel.

Color differences in rendering to Microsoft Excel

Microsoft Excel supports a predefined set of colors. When a report is rendered, Excel tries to best match the report colors to those in its standard color palette for workbook elements.

Page headers and footers

The Excel headers and footers have a restriction of 255 characters. Excel truncates the string if it contains more than 255 characters.

Images

An image can be a logo or a picture, or it can be a picture that is repeated with rows of data.

If the report author used a URL-based image in a report, the image contains a URL that points to an image on the IBM Cognos Analytics report server. Images are rendered to Excel as static pictures.

If your credentials do not have sufficient rights to access the image, the image will not be shown in the report.

Lists

If the report element that you are importing is a list, you can choose to import it as an Excel list by selecting the **Import as an Excel list** option in the **Import Content** wizard. You can then easily manage and analyze groups of related data in a worksheet. When you designate a range as a list, you can also manage and analyze the data in the list independently of data outside the list. For example, using only the data contained in the list, you can

- filter columns

  By default, the AutoFilter is enabled in the header row so that you can filter and sort your data quickly.

- add a row for totals

  When you click a cell within the total row, a drop-down list of aggregate functions becomes available.

Report design tips

This section provides general information, best practices, and tips for importing report elements and then designing customized reports in Microsoft Excel.

Recommendation - use page breaks to improve performance of large reports

Microsoft Excel has no default page size. As a result, if you have a large report, Excel tries to render it as a single worksheet.

If you do not specify page breaks for a report that returns a large amount of data, some report formats try to render a report as a single page.

When importing report elements, you can use the **Insert breaks between report pages** option in the **Import Content** wizard.

In general, using page breaks improves the performance of users accessing the report because they can view the first page while the rest of the report is being rendered.

Recommendation - apply cell formatting to negative numbers

Apply cell formatting to negative numbers.

To highlight negative numbers in red, apply the cell formatting in the cell number property instead of the font color. If the data changes, the cell remains red if it is applied as red to the font, but reverts to black if the negative number format is applied.

Recommendation - use the Excel list for data validation

Use the Excel list feature with the IBM Cognos for Microsoft Office cell reference option to provide data validation.

By entering possible values in a column and designating that column as an input validation list in Excel, you can select data values for use with IBM Cognos for Microsoft Office cell reference.

For more information, see the Excel *Online Help*.

Techniques in Microsoft PowerPoint

You can apply the following best practices to access IBM Cognos content and customize reports in your Microsoft PowerPoint environment.

You should be aware of some of the unique limitations of Microsoft PowerPoint that impact rendering pre-authored IBM Cognos Analytics reports.

Recommendation - use copy and paste commands

You can copy or move imported elements between slides by using Windows Copy and Paste commands.

Each copy of an element retains its link to IBM Cognos for Microsoft Office. Changing the number of rows or columns in a table changes the amount of data that is refreshed into that shape, unless the **Autosize** option is used, in which case the application adds or deletes rows or columns as necessary. The shape accommodates as much data as it can fit.

Do not delete objects manually. Always use the **Remove Data** link or **Clear All Data** button . Otherwise, the object placeholder is lost and you can no longer refresh the item.

Recommendation - create PowerPoint-specific tables and charts

Create tables and charts specifically for importing into PowerPoint.

In PowerPoint, the number of rows and columns in a table are limited based on the version of software. For PowerPoint 2003, tables are limited to 25 rows and 25 columns. For PowerPoint 2007 and 2010, tables are limited to 75 rows and 75 columns. This may present a challenge to create report tables and lists that fit within these requirements and still provide the data that you want.

After editing tables and then refreshing data, the table reverts to the unedited version. For example, if you delete multiple rows and then refresh data, the deleted rows are added back to the table.

Edit tables in the IBM Cognos Analytics studios before importing. This eliminates the need to delete unwanted rows after refreshing data.

Techniques in Microsoft Word

You should be aware of best practices before accessing IBM Cognos content in your Microsoft Word environment.

Recommendation - create tables and charts

Create tables and charts specifically for importing into Word.

In IBM Cognos for Microsoft Office, in the Microsoft Word environment, tables are limited to 32,000 rows and 63 columns. While the maximum number of rows allowed in a Word table is 32,000, the Microsoft Word API and memory limitations can limit the import of tabular data into Word to less than 32,000 rows on most systems. Performance on the import process might be impacted at the level of 1,000 rows.

Objects within tables are rendered incorrectly after an import. Similarly, the creation of tables within tables degrades performance in Microsoft Word. Importing a large table within another table is significantly slower than importing a single table with no nested objects; therefore, avoid importing nested objects into Microsoft Word.

Create report tables and lists that fit within these requirements and still provide the data that you want.

For more information about table sizes, see "Recommendation - maintain table size to a minimum" on page 67.

For more information about avoiding nested objects, see "Recommendation - avoid nesting objects" on page 67

Recommendation - create text box titles

Create text box titles for report elements.

You can get more smart tags created by Microsoft or by other companies, who may design smart tags and actions for the specific products or services that you work with. For example, if you work in a sales

department, you may be able to click a product name smart tag in your document that offers actions such as check quantity in stock, or price.

Use the text box in the header or footer. Import the report once specifying only the header, which you insert into the section header or footer so that you can use the report labels as smart tags. The data will be recognized and labeled as a particular type on which you can perform actions.

Finally, import the report again as a second report element to get the text that you want in the header or footer.

Recommendation - import text as field codes

Combine inline field codes with introductory text to create introductory language for report tables, charts, and other objects.

Text appears as other text and you can format it using Word paragraph and character styles. Because they are field codes, they can still be distinguished as IBM Cognos for Microsoft Office content.

If you want to present report content in line with other text in the document, import the text as field codes using the **Import as inline field code** option.

Chapter 8. Automating IBM Cognos Office

Using an application programming interface (API), you can automate the refreshing or publishing of workbook, document, and presentation content. You can use a scheduling tool, such as Scheduled Task, and can process one or more workbooks, documents, or presentations.

You can use the API to create a scheduled batch program to refresh all the IBM Cognos Office workbooks, documents, or presentations on a daily, weekly, or monthly basis so that, as your period data changes, the affected files are kept up-to-date.

You can call the API within Microsoft Excel workbooks, Microsoft Word documents, or Microsoft PowerPoint presentations using VBA or using VBS and a command line interface. For these types of automation to work, you must register one or more macros within the workbook, document, or presentation.

When using sample macros and script files as part of your own processing functions, remember that the API is accessible only as user defined functions (UDFs) in the Microsoft Office products: Excel, Word, or PowerPoint. UDFs are functions created in Visual Basic for Applications (VBA). In this case, however, the UDFs are created within the IBM Cognos Office solution and are called from VBA.

To help you understand what is possible using this API, several samples are provided. You can use them to help you create your own solutions by

- creating VBA macros within Excel, Word, or PowerPoint
- passing parameters, leveraging VBS and the command line interface

In addition to these capabilities, you can schedule scripts, either ones that you create or the samples, to run as a batch process at a set time.

Before you begin

You must ask your administrator to make the sample files available to you in a location that you can access.

Procedure

1. Refresh the IBM Cognos Office data.
2. Import the CognosOfficeAutomationExample.bas file.
3. Use the IBM Cognos Office API functions.
4. Refer to the IBM Cognos Office Visual Basic (VBA and VBS) sample script files to enhance your solution.

Example - refreshing data in your Microsoft Office document

When you use automation to refresh a workbook, document, or presentation content, you must set your macro security to an appropriate level. You can set the macro security level using one of the following options depending on your version of Microsoft Office:

- Change the security level of your Microsoft Office application to medium or low.
- Change the trusted publishers setting of your Microsoft Office application so that installed add-ins or templates are trusted.

The following code shows the most basic techniques for using the IBM Cognos Office CognosOfficeAutomationObject property.

In the following example, you must log on to the IBM Cognos Analytics Web server, *ibmcognos*/bi/v1/disp, to refresh the data contained in your Microsoft Office document.

```
Sub Logon()
    Dim UserName As String
    Dim Password As String
    Dim Namespace As String
    Dim URL As String
    Dim LogonResult As Boolean
    UserName = "Admin"
    Password = "Admin"
    Namespace = "Production"
    URL = "http://localhost/ibmcognos/bi/v1/disp"
        '    Check that the automation object returned by
        '    CognosOfficeAutomationObject is valid before using it.
    If Not CognosOfficeAutomationObject is Nothing Then
        LogonResult = CognosOfficeAutomationObject.Logon
            (URL, UserName, Password, Namespace)
        If LogonResult = True Then
            MsgBox "Logon succeeded."
        End If
    End If
End Sub
```

After logging on, you can refresh your data. For more information, see .

Setting up the Microsoft Office applications for automation

The quickest way to set up the Microsoft Excel, Word, or PowerPoint applications for automation is to import the CognosOfficeAutomationExample.bas file into the Microsoft Excel workbook or the Microsoft Word document or the CognosOfficeAutomationPPExample.bas file into the Microsoft PowerPoint presentation.

These files contain all the necessary macros, including the CognosOfficeAutomationObject macro. Alternatively, you can create templates that already contain this imported .bas file that supply the code for logging on to IBM Cognos Office, refreshing the content of specified workbooks, documents, or presentations, and logging off.

Before you begin

To use the IBM Cognos Office automation macro files, you must import the CognosOfficeMessageSuppressor.cls file. The .cls file contains the SuppressMessages function that allows you to disable the standard alerts and messages.

Procedure

1. Open a new Office document, workbook, or presentation.
2. From the **Tools** menu, click **Macro**, and then click **Visual Basic Editor**.
3. Do the following based on the Microsoft Office application:

   - For Microsoft Excel and Microsoft PowerPoint, right-click **VBAProject** and click **Import File**.

   - For Microsoft Word, right-click **Project** and click **Import File**.

   The **Import File** dialog box appears.
4. Browse to the location where the IBM Cognos Office Automation macro files are installed.

   The default location is *client_installation_directory*\Automation.
5. For Microsoft Excel or Microsoft Word click the CognosOfficeAutomationExample.bas file or for Microsoft PowerPoint click the CognosOfficeAutomationPPExample.bas file and import it into the VBA project.

   Do not edit this code module. Do not import both files, which are application specific. This will cause problems for the Open routine.
6. Repeat steps 3 to 5 to import the CognosOfficeMessageSuppressor.cls file.

7. Close the **Visual Basic Editor** and return to IBM Cognos Office.
8. Save the file as a template, close it, and then reopen the template file.

Results
You can now call the macros contained in the Cognos Office automation macro files from the VBA code that you write in Excel, Word, or PowerPoint.

Logging automation activities and errors

Use the automation log to track automation activities and troubleshoot problems with automation tools and scripts. The automation log is automatically generated when you run an automation script.

The automation log is returned using a call to the Automation API function TraceLog. For information about the TraceLog function, see "TraceLog" on page 79.

IBM Cognos global API functions

Global API functions can be used to interact with any IBM Planning Analytics for Microsoft Excel worksheets.

The global functions that are exposed through the IBM Cognos automation objects are:

HttpLogonCredentials

The HttpLogonCredentials function authenticates a user to a Web site that requires new authentication credentials, such as Basic, Kerberos, and SiteMinder. HttpLogonCredentials takes the URL, user name, and password that are used for authentication on the Web site.

Syntax

IBM Cognos does not support SiteMinder form-based authentication. You must use the IBM Cognos menu commands and options instead of the API to automate the refreshing and publishing of content.

HttpLogonCredentials (*url, user name, password*)

Table 12. Arguments for HttpLogonCredentials		
Argument	Description	Data type
url	The URL for the Web site against which you want to authenticate	String
user name	The user name for authentication	String
password	The password for authentication	String

Logon

The Logon function takes the URL of the server and the credential elements required by IBM Cognos to perform a logon: user ID, password, and namespace. The namespace parameter is case-sensitive; therefore, you must match the namespace exactly.

Syntax

IBM Cognos Office stores user credentials only in memory. For this reason, users are responsible for storing their credentials in a secured area and passing them to the logon methods at run time.

If you use the Logon function with incorrect credentials, the system raises a CAMException error, however, no exception is written to the log file indicating a failure. To avoid this situation, remember that strings are case-sensitive and ensure that you use valid user IDs, passwords, and namespaces.

Logon does not appear in the macro list in the Microsoft application because the macro receives an argument. Any macro with parameters is by definition private and private macros are not shown in the macro options by default.

Boolean Logon (*url, user name, password, namespace*)

Parameters

Table 13. Arguments for Logon		
Argument	**Description**	**Data type**
url	The URL for the IBM Cognos server to which you want to log on	String
user name	The user name for authentication	String
password	The password for authentication	String
namespace	The specific namespace for authentication	String

Return value

Data type: Boolean

The Boolean value that is true if successful

Example

Here is an example of this syntax:

```
Dim bResult As Boolean
```

```
bResult = CognosOfficeAutomationObject.Logon
("http://localhost/ibmcognos/bi/v1/disp",
"Administrator", "CognosAdmin", "Production")
```

ClearAllData

ClearAllData clears all the IBM Cognos data values in the current document.

Syntax

```
ClearAllData()
```

Example

The following syntax is an example:

```
CognosOfficeAutomationObject.ClearAllData
```

RefreshAllData

RefreshAllData fetches the most current data values from the IBM Cognos server and updates those values in the current document.

Syntax

The system must be successfully logged on to the IBM Cognos server.

If you are using IBM Cognos Office with IBM Cognos Analytics data, ensure that the **Prompt Update Method** property on the **Manage Data** tab in the IBM Cognos pane is set to **Use=Display** or **Do Not Update** to complete the operation. Otherwise, the report cannot be refreshed without user intervention and generates errors.

```
RefreshAllData()
```

Example

The following is an example of this syntax:

```
Dim bResult as Boolean
```

```
bResult = CognosOfficeAutomationObject.Logon
("http://localhost/ibmcognos/bi/v1/disp",
"Administrator", "CognosAdmin", "Production")
```

```
'Refresh the data if we successfully logged on to the
IBM Cognos server.
```

```
If bResult Then
```

```
   CognosOfficeAutomationObject.RefreshAllData
```

```
End If
```

RefreshAllDataAndFormat

RefreshAllDataAndFormat retrieves the most current data values and formatting from the IBM Cognos server and updates those values and formats in the current document.

Syntax

The system must be successfully logged on to the IBM Cognos server.

If you are using IBM Cognos Office with IBM Cognos Analytics data, ensure that the **Prompt Update Method** property on the **Manage Data** tab in the IBM Cognos pane is set to **Use=Display** or **Do Not Update** to complete the operation. Otherwise, the report cannot be refreshed without user intervention and generates errors.

```
RefreshAllDataAndFormat()
```

Example

The following example shows how the RefreshAllDataAndFormat method is used:

```
Dim bResult as Boolean
```

```
bResult = CognosOfficeAutomationObject.Logon
("http://localhost/ibmcognos/bi/v1/disp",
"Administrator", "CognosAdmin", "Production")
```

```
'Refresh the data and formatting if we successfully logged on to the
IBM Cognos server.
```

```
If bResult Then
```

```
CognosOfficeAutomationObject.RefreshAllDataAndFormat
```

```
End If
```

UnlinkAllData

UnlinkAllData disconnects all the IBM Cognos data values in the current document. The values are no longer updated with subsequent calls to RefreshAllData. The values become static.

Syntax

For IBM Cognos Office, any IBM Cognos data values that are imported into the current document after UnlinkAllData is called will continue to be linked to the IBM Cognos data source.

The values can be updated with new server data using the RefreshAllData call.

```
UnlinkAllData()
```

Example

The following is an example of the syntax:

```
CognosOfficeAutomationObject.UnlinkAllData
```

Publish

Use Publish to publish content to IBM Cognos Connection or to a TM1 server.

Syntax

The arguments mirror the entry boxes in the dialog box that is used in the user interface.

Publish does not appear in the macro list in the Microsoft application because the macro receives an argument. Any macro with parameters is by definition private and private macros are not shown in the macro options by default.

Publish (*URL, document path*, *server path*, *name, description, screenTip*)

Parameters

Table 14. Parameters for the Publish macro		
Argument	**Description**	**Data type**
URL	The server to which you are publishing.	String
document path	The location of the document to be published. It is the local path of the file that you want to publish. If the path of your folder is not correct when you publish using automation, you are again prompted to log on. This is because IBM Cognos does not distinguish between non-existing folders and folders for which the user does not have permissions. This security feature helps to prevent the discovery of the folder path by trial and error. In IBM Cognos Analytics, the folder path is a search path. For more information, see the IBM Cognos Analytics *Administration Guide*.	String
server path	The path in the content store where the document is saved.	String

Table 14. Parameters for the Publish macro (continued)		
Argument	Description	Data type
name	The document name that will appear in IBM Cognos.	String
description	The document description that will appear in IBM Cognos.	String
screenTip	The text that users see when they point to the document in IBM Cognos.	String

Example

Following is an example of this syntax:

```
Publish("CAMID('::Anonymous')/folder[@name='My
Folders']","Description of 'My Folders'", "")
```

Logoff

Logoff logs off all the IBM Cognos servers to which users are currently logged on.

Syntax

```
Logoff()
```

Example

The following syntax is an example:

```
CognosOfficeAutomationObject.Logoff
```

TraceLog

TraceLog returns all the automation activities and errors.

Syntax

String TraceLog()

Return value

Data type: String

The value of the logging item as string

Example

The following is an example of the syntax:

```
Dim strTraceLog as String
```

```
strTraceLog = CognosOfficeAutomationObject.TraceLog
```

```
MsgBox strTraceLog
```

SuppressMessages

SuppressMessages suppresses the standard alerts and messages that are shown during the normal operations of IBM Cognos applications.

Syntax

```
SuppressMessages()
```

Example

The following is an example of the syntax:

```
Private Sub Class_Initialize()

    CognosOfficeAutomationObject.SuppressMessages True

End Sub
```

```
Private Sub Class_Terminate()

    CognosOfficeAutomationObject.SuppressMessages False

End Sub
```

ClearCache

ClearCache reduces the size of an IBM Planning Analytics for Microsoft Excel workbook by clearing metadata and data from formulas.

Syntax

```
ClearCache()
```

Example

The following is an example of the syntax:

```
CognosOfficeAutomationObject.ClearCache()
```

UpdateServerUrl

Use UpdateServerUrl to update the IBM Cognos server information for existing reports and formulas.

Syntax

The UpdateServerUrl method takes two arguments: the old server URL and the new server URL. These arguments mirror the entry boxes in the **Update System** dialog box. To gain access to this control from IBM Cognos, click the **Options** button on the IBM Cognos ribbon, then click **Update System Utility**.

The UpdateServerUrl method replaces the server information for existing reports. When running this command, the name of the package or data source remains the same. You can use this method to change only one server, such as a test server to a production server. The URL arguments can be full or partial URLs. If any argument is empty, this command does nothing, however, running this command with empty arguments has the potential to corrupt the report. Server information is stored in both the server property and the serialized report property. Running an empty command could cause these two instances to get out of sync.

Because the UpdateServerUrl method searches and replaces strings, it is possible to use only part of the URL, provided it is a unique substring.

Note: The UpdateServerUrl search looks at all data in the workbook and updates data that matches the search string, not just report properties containing the URL string. Therefore, when you use only part or all of the original URL string with the UpdateServerUrl method, you will change all data that matches the search string

UpdateServerUrl "*old server URL string*" "*new server URL string*"

Parameters

Table 15. Parameters for the UpdateServerUrl method

Argument	Description	Data type
old server URL string	Indicates the URL of the source or current system.	String
new server URL string	Indicates the URL of the target system.	String

Example

The following example uses the complete URL:

```
UpdateServerUrl "http://testserver1/bi/v1/disp"
"http://prodserver1/bi/v1/disp"
```

The following example uses only the part of the URL that is changing:

```
UpdateServerUrl "testserver1" "prodserver1"
```

Example - code for processing within VBA

The following example demonstrates how to call the Logon method within VBA:

```
Dim bResult as Boolean


bResult = CognosOfficeAutomationObject.Logon
("http://localhost/ibmcognos/bi/v1/disp","Administrator",
"CognosAdmin", "Production")


If bResult Then


    CognosOfficeAutomationObject.ClearAllData()


    CognosOfficeAutomationObject.RefreshAllData()


    CognosOfficeAutomationObject.Logoff()


    Dim sTraceLog as String


    sTraceLog = CognosOfficeAutomationObject.TraceLog


    'Here is where you could write the trace log to file.


    MsgBox sTraceLog
```

```
End If
```

Example - code for processing outside VBA

You may want to use IBM Cognos Office Automation outside VBA. You cannot call the APIs directly.

You must create wrapper macros in the Microsoft Office document for every API. You can then call these macros from your code. The module CognosOfficeAutomationExample.bas is an example of a wrapper macro that you can call from outside VBA.

The following Visual Basic Script opens Microsoft Office Excel, logs on to IBM Cognos Analytics, refreshes the content, and logs off.

```
' Start Excel in batch mode

Set objExcel = CreateObject("Excel.Application")

objExcel.Visible = False

objExcel.ScreenUpdating = False

objExcel.DisplayAlerts = False

'Open a workbook that has IBM Cognos data
in it.

Set objWorkbook = objExcel.Workbooks.Open("C:\workbook1.xls")

' Call the wrapper macros

objExcel.Run "Logon", "http://localhost/ibmcognos/bi/v1/disp",
"Administrator", "", "Production"

objExcel.Run "RefreshAllData"

objExcel.Run "Logoff"

objExcel.Run "TraceLog", "C:\AutomationLog.log"

objWorkbook.Save

objWorkbook.Close

objExcel.Quit
```

Macro files for automating Cognos Office

The macro files for Cognos Office are written in Microsoft Visual Basic for Applications (VBA).

They are installed with IBM Cognos Office in the Automation folder. The default location is *client_installation_directory*\Automation.

The Microsoft Excel and Word applications share the same CognosOfficeAutomationExample.bas file. The Microsoft PowerPoint application has its own file named CognosOfficeAutomationPPExample.bas. Do not import both files, which are application specific, into the same application. This will cause problems for the Open routine.

The following macro files are installed.

Table 16. Sample macros	
File	**Description**
CognosOfficeAutomationExample.bas	Because it is a BASIC file created using VBA, this file has the extension .bas. It contains the CognosOfficeAutomationObject property that enables IBM Cognos Office automation in the current Microsoft Excel workbook or Word document. It also contains wrapper functions that call the API exposed by IBM Cognos Office.
CognosOfficeAutomationPPExample.bas	This file is the same as the CognosOfficeAutomationExample.bas file, except that it is tailored to suit the Microsoft PowerPoint application.
CognosOfficeMessageSuppressor.cls	This file shows how to use the SuppressMessages API function.

Script files

The installation includes sample script files that you can use to automate functions. The samples include script files for scheduling the refresh of workbooks, documents, or presentations. Also, there is a script file to update the server URL.

You must modify the script files to meet your particular needs or use them as a reference to create your own programs. For more information, see the comments in the file.

These Visual Basic Scripts (VBS) are provided as sample programs and are located in *client_installation_directory*\Automation:

- Automate_COI.vbs
- Automate_COI_Excel.vbs
- Automate_COI_Word.vbs
- Automate_COI_PowerPoint.vbs
- AutomateServerURLSample.vbs

Chapter 9. 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

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

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

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
   ```

IBM Cognos button is disabled or missing

You have started a Microsoft Office application, but the IBM Cognos button is disabled or missing from the toolbar or the Add-ins tab. A security warning is displayed with a **Always trust macros from this publisher** check box. The warning will vary according to the level of security that you have chosen for macros and add-ins. You must either select the check box in the security message or lower the macro security level so that you are not prompted each time that you start an application.

The Trust Center has detected the IBM Cognos Office add-in as unsafe, and it has disabled the add-in by default. The add-in did not satisfy specific security criteria, such as a valid and current digital signature, a reputable certificate, or a trusted publisher. There are different potential causes for the disabled IBM Cognos button and the security message.

- Your macro security level is set to High

  You have also disabled the **Trust all installed add-ins and templates** security option by clearing the check box. In this case, all unsigned macros are automatically disabled. To resolve this problem, you must lower the macro security level.

- In Microsoft Office 2007, the **Require Application Add-Ins to be signed by Trusted Publisher** security option was enabled, which prevents the IBM Cognos Office add-in from displaying in the Add-in list.

Note: If your company's security policy does not permit you to set a macro security level lower than High, or it requires that all add-ins have a signed certificate, in the security warning message, select the **Always trust macros from this publisher** check box, close the Microsoft Office application, and then restart it.

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 cognoisapi.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.

The server committed a protocol violation

The EXCEL.EXE.config file is required and is missing. Section=ResponseHeader Detail=CR must be followed by LF.

You must create the EXCEL.EXE.config file, copy it to the same location as IBM Cognos Analysis for Microsoft Excel and add the following lines:

<?xml version="1.0" encoding="utf-8" ?>

<configuration>

<system.net>

<settings>

<httpWebRequest useUnsafeHeaderParsing="true" />

</settings>

</system.net>

</configuration>

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

HTTP 500 - Internal server error or program stops responding when importing a prompted report

If you are using Microsoft Internet Information Services (IIS) v7.5 as the Web server for IBM Cognos Analytics products, when importing a prompted report, you receive an HTTP 500 - Internal server error or the program stops responding.

This message is a general server-side error in which the web server encountered an unexpected condition that prevented it from fulfilling the request from the client. The web server is able to display only the generic HTTP 500 status code because it cannot be more specific about the error condition. While the web server might generate an internal error log, it is not configured to display the exact problem or error message in the remote browser.

To understand the cause of the error and support IBM Cognos for Microsoft Office, you must configure IIS to send the exact error message to the remote browser (client).

Sending error messages to the requesting client browser

To display the exact reason that a request to the IBM Cognos server was not successful, you must configure IIS v7.5 to send the error message to the remote client. By default, IIS does not send error details to the requesting client.

Before you begin

To receive a detailed description of the error, in Internet Explorer, disable the **Show friendly HTTP error messages** option. Otherwise, the actual text of the HTTP 500 error message that is sent to the browser could be masked by an Internet Explorer general error message.

Procedure

1. On the Cognos web server, open Internet Services Manager, and select the Cognos cgi-bin virtual directory.
2. In the IIS section, expand **Debugging Properties** and ensure that the **Send errors to browser** is set to **True**, and then click **Apply**.
3. To view the actual error message description, in IIS Manager, expand the server node, expand **Sites**, select **Default Web Site**, and in the IIS section, double-click the **Error Pages** icon.

   The list of error codes and related IIS error pages are displayed.

   a) Right-click **500**, and then click **Edit Feature Settings**.

   b) In the **Edit Error Pages Settings** window, select **Detailed errors**.

Results

Now you can view the exact IBM Cognos for Microsoft errors in the web browser remotely. The specific error associated with your prompted report is displayed.

What to do next

Change the settings back to the default if and when the IBM Cognos server is used in a production environment.

Processing Issues

The following issues are related to processing and rendering reports.

Cannot Render this Report

The Report Data Service (RDS) cannot bring report elements into a Microsoft Office document. Some combinations of text and images are beyond the scope of the target application.

To resolve this problem, evaluate the report and attempt to simplify the content requirements so that IBM Cognos for Microsoft Office can render the report.

RDS Data Limit Exceeded When Importing from Large Report Outputs

While attempting to import all or part of a large report, the application attempts to open the entire report. A provisional governor limit restricts the size of report output allowed and might result in an error (even if you are trying to import only part of a report).

To resolve this problem, you can adjust the size limit for report data by changing the Governor limit setting.

Procedure

1. Start IBM Cognos Connection.
2. In the upper-right corner, click **Launch**, **IBM Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change view** menu. Click **Services**, and then click **Report Data**.
5. Click the arrow next to **ReportDataService** to view the **Action** menu, and then click **Set Properties**.
6. Click the **Settings** tab.
7. In the **Value** column, change the number for **Governor limit (MB)**, and then click **OK**.

RDS Server Unavailable

The IBM Cognos Report Data Service (RDS) manages the transfer of report data between IBM Cognos Business Intelligence and applications that consume the data, such as IBM Cognos for Microsoft Office.

To resolve this problem, restart Report Data Server. Report Data Service restarts when the IBM Cognos service is restarted.

Procedure

1. In a browser, connect to IBM Cognos Analytics as an administrator.
2. In IBM Cognos Connection, in the upper-right corner, click **Launch**, **IBM Cognos Administration**.
3. On the **Status** tab, click **System**.

4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change View** menu. Click **Services**, and then **Report Data**.

5. With the **Report Data** service displayed, click the arrow to view the **Actions** menu next to the service, and then click **Start**.

6. If Report Data Service fails to start, or if IBM Cognos Analytics is not responding, start IBM Cognos Configuration.

7. Choose whether to start or restart IBM Cognos Analytics.

   - If IBM Cognos Analytics is not running, click **Start**.

   - If IBM Cognos Analytics is running, click **Restart**.

Imported Reports Are Missing Charts or Images

IBM Cognos for Microsoft Office is functioning normally, but charts and images are missing. The client machine, which is running IBM Cognos for Microsoft Office, cannot connect to the gateway URL as configured in IBM Cognos Analytics.

This may be because it is behind a firewall, the hostname/DNS is not known to this client machine, or the client machine has proxy issues.

To resolve the connectivity issues, work with your system administrator.

Report Objects are missing after opening a saved Microsoft Word 2007 document

When you open a local document that was saved in Microsoft Word 2007, you may notice that the report objects that were originally imported are missing. Additionally, you are unable to properly refresh the report.

Microsoft Word 2007 has problems processing document variables contained in files that are saved in new file formats, such as .docx. The problem occurs in the Word 2007 hotfix package as described in KB 969604 on Word 2007 SP2. This update is automatically applied if you turned on the Windows **Automatic Updates**. When installed, the version of Word 2007 with SP1 or SP2, including this update, is 12.0.6504.5000.

In general, imported IBM Cognos Analytics reports that are saved as Microsoft Word documents include document variables that store hidden metadata. When you save a document in the Word 2007 format, the document variables may change unexpectedly and become corrupted if the Microsoft Word application was at the hotifx level as described in KB 969604. When the document variables are corrupted, you are not able to refresh the report data.

To resolve this issue, you must download and install Microsoft Word hotfix package that is dated June 30, 2009 (KB 970942). When installed, the version of Word 2007, after the new hotfix, is 12.0.6510.5001.

This hotfix is not available through the Windows **Automatic Updates**; you must request and download it from the Microsoft Web site. After downloading this hotfix version, re-import the report to successfully refresh it.

RSV-CM-0005 Content Manager did not return an object

When refreshing a prompted report in IBM Cognos for Microsoft Office, an error appears if the Prompt parameter was set to Always Prompt.

RSV-CM-0005 Content Manager did not return an object for the requested search path storeID <store_ID>

You are refreshing a report that was saved with the same file name as an existing report. You cannot replace the existing report by creating a new report with the same name because the new report has a different internal ID. The fully qualified location of the report entry in the content store is represented by the the search path, ID and URL. Entries are assigned a unique identification (ID) number. If the Prompt

parameter in IBM Cognos for Microsoft Office is set to **Always Prompt**, the application uses the content store ID to load the report, not the search path.

Another cause for this error might be that you are refreshing an imported report from a full deployment in which you have moved the entire content store from a source environment to a target environment. References to deployment objects are based on search paths, not IDs. For a specific IBM Cognos Connection page, the page ID of an object remains valid until the application's deployment mechanism transfers the original object to another IBM Cognos Analytics server. In the target environment, all IDs are different.

To resolve these issues, in IBM Cognos for Microsoft Office, you must change the value of the **System** report property.

Procedure

1. In IBM Cognos for Microsoft Office, click the **Manage Data** tab.
2. Expand the hierarchical list and click the report.
3. In the **Properties** pane, expand the **Report** group.
4. Change the **System** property by adding a forward slash "/"at the end of the system gateway URI.

   For example, http://*server_name*/ibmcognos/bi/v1/disp/

5. On the IBM Cognos toolbar, click the refresh all data button   .

   The prompt value that was saved with the report is discarded and you are prompted for a new value.
6. Close the **Prompt** window.
7. Change the **System** property by removing the forward slash "/" that you added in step 4.

   For example, http://*server_name*/ibmcognos/bi/v1/disp.
8. On the IBM Cognos toolbar, click the refresh all data button.

   The properties for the updated prompt now have default values. If you want to prompt users each time the report is refreshed, you must set the **Prompt** property value to **Always Prompt**.

   Note: The URI that was modified in step 4 was automatically added to the list of system gateway URIs in the **Options** dialog box. You must manually remove this invalid URI.

   If the invalid URI is retained, the saved prompt values are ignored and the application will always prompt you for a value.

IBM Cognos pane is not available after refreshing data

During the refresh process, the IBM Cognos for Microsoft Office program stops responding and you need to restart the Microsoft Office application. When the Microsoft Office application is restarted, and you have logged onto the namespace, the IBM Cognos pane is not available.

The Microsoft Office program has encountered a startup problem. When a problem is detected at startup, Microsoft Office either fixes the problem or isolates it, allowing the program to start successfully.

One of the reasons that the IBM Cognos pane is not available is because the Microsoft Office program has disabled the application add-in when a process that is running is not responding. The process may stop responding when you are refreshing very large reports.

A list of disabled items is accessible through the **Disabled Items** dialog box (**Help**>**About Microsoft Office <Application Name>**). You can use this dialog box to enable the listed items by clicking **Enable**. However, enabling the item might require you to reload or reinstall the IBM Cognos add-in program. You can also enable the add-in by following the procedures later in this section.

Enable IBM Cognos Add-ins (Office 2007)

PowerPoint and Excel automatically disable add-ins that haven't started successfully before. Therefore, the IBM Cognos for Microsoft Office add-ins may be disabled if the program stopped responding while starting PowerPoint or Excel.

About this task

You can manually enable the IBM Cognos add-ins when they are automatically disabled by the Microsoft Office program. The following steps apply to Microsoft Office 2007.

Procedure

1. Click the **Microsoft Office** button, click **Excel Options**, and then click **Add-Ins**.
2. In the **Manage** box, select the **COM Add-ins** type, and then click **Go**.
3. In the Com Add-Ins dialog box, select either or both of the following Add-ins that you want to enable and click **OK**.

   - IBM Cognos Office for Excel
   - OfficeAddIn

4. Close the Microsoft Office application and then restart it.

#ERROR Appears in Cells that Contain Multiple Images (Excel Only)

Multiple images in a cell cannot be rendered.

To resolve this issue, the report author must change the design of the report by moving each image to its own cell. When this is accomplished, you can reimport the report.

The Dispatcher Is Unable to Process the Request

A message indicates that the request is directed to an unknown service name: <content>. The IBM Cognos Report Data Service (REDS) cannot bring report elements into a Microsoft Office document. Some combinations of text and images are beyond the scope of the target application.

To resolve this problem, evaluate the report and attempt to simplify the content requirements so that IBM Cognos for Microsoft Office can render the report.

Report Content is Not Imported

When importing a report, Microsoft Excel does not render the report and the worksheet remains blank.

If the report name has a single quotation mark and the **Create new worksheets for report pages** option is selected, the report content is not imported.

To resolve this problem, you must rename the report without the single quotation mark.

Saved report output versions are not available for import

On the **Select Report Properties** page of the **Import Content** wizard, under **Report Version**, the **Select a specific output version** option is disabled. To make the report output versions available for import, the report author or administrator must have configured the necessary report property in the business intelligence studio in which the report was saved.

About this task

For reports, a report output version is kept each time a report is run in a business intelligence studio according to a schedule. To import or run saved report output versions, your administrator must have

selected the **Enable enhanced user features in saved output versions** option when the report version was run or saved in any of the studios.

Your administrator must manually set this option, as described in the following procedure, for every IBM Cognos Analytics report version that requires access from IBM Cognos for Microsoft Office.

Procedure

1. In IBM Cognos Connection, locate the entry item that is the report whose saved versions you want to view or import.
2. In the **Actions** column, click the Set Properties button for the entry.
3. On the **Report** tab, expand **Advanced Options**, select the **Enable enhanced user features in saved output versions** check box, and click **OK**.
4. Recreate the report output versions for the report.

Results

The saved report output versions are available for import from the **Import Content** wizard.

Your administrator can also specify how long to keep report output. For example, the administrator can keep report output for a specific number of runs or for a specific number of days or months. For more information, see the *IBM Cognos Connection User Guide*.

Depending on the properties set for the report versions, each time that you use the **Refresh All Data** command, you either view an output version of the report or update the imported report with the most recent data. For more information, see "View or run report output versions" on page 48.

Incorrect Format for the Prompt Value in Prompted Reports

When you refresh a prompted report using the Specified Value type, the prompt value does not display properly in the UseValue field.

Not all prompt values are affected. Some of the prompt properties appear as expected while others may look like this:

```
[great_outdoors_company].[Products].[Products].[Product line]->
:[PC].[@MEMBER].[5~236]
```

In this example, the selected prompt value is "Golf Equipment" which is displayed properly in the **Display Value** prompt property.

In cases where this occurs, you must know that the equivalent format in the **Specified Value** is the value with which you want to refresh the report. In the example, [great_outdoors_company].[Products]. [Products].[Product line]-> :[PC].[@MEMBER].[5~236] is equivalent to Golf Equipment.

To refresh the report, we recommend that you use the **Always Prompt** option. That way, users can select the value from the report's own prompt dialog box.

Procedure

1. To view the report properties, from the **Manage Data** tab, click the report.
2. Expand the prompt properties.
3. In the **Type** box, click **Always Prompt**.
4. Refresh the report.

   The report refreshes with the requested parameters.

   Note: This does not affect the import of prompted reports.

DPR-ERR-2079 Firewall Security Rejection

If you run a report after your session has expired and then try to navigate away from the first page of the report, you encounter an error.

DPR-ERR-2079 Firewall Security Rejection. Your request was rejected by the security firewall. CAF rejection details are available in the log. Please contact your administrator.

When the DPR-ERR-2079 error occurs after an expired session, you must log on again to resolve the problem.

Procedure

1. In the report list, right-click the node item, which appears before other items.
2. Click **Log On**.
3. Provide your authentication credentials as prompted and click **OK**.

Item cannot be expanded

Microsoft Excel has reached the maximum number of rows or columns for this worksheet. The number of rows and columns is limited in Microsoft Excel. Expanding the current item is not possible because it would shift rows or columns beyond this worksheet limit. Microsoft Excel cannot shift nonblank cells off the worksheet.

Manually move items so that the row or column item can expand without reaching the limit, or move your Exploration View, list, or report to another worksheet. Or, you can move the data to a new location and try again.

Prompted to Log on for Each Imported Report

When refreshing all data in a document before logging on to the required servers, you are automatically prompted to log on for each report in the document even if the reports originate from the same server.

To log on only once to each server, use the Log On toolbar button to log on to the required servers before refreshing report data.

Object reference not set to an instance of an object

An internal processing error occurred. Initialization of a critical process failed.

Contact IBM Cognos Resource Center. Be ready to supply all relevant logs and details related to this error.

Security Issues

The following issues are related to security setup.

Cognos Office Unable to Create Trust Relationship

If you are using HTTPS to Report Data Service and you receive an error in IBM Cognos Office about being unable to trust the relationship, the Certificate Authority (CA) certificate that was issued by the Web server is not trusted on the client workstation.

To resolve this problem, you must ensure that the Certificate Authority (CA) that issued the Web server certificate is also trusted on the client workstation. If the certificate is not from an authority that is already trusted on the client, such as Verisign, you must install the CA certificate in the trust store on the client.

Procedure

1. Retrieve the CA certificate from the issuing authority.

   The file has a .cer extension. This is not the same certificate as the one used by the Web server. It is the certificate for the issuing authority itself.

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**.

Unable to View Reports After Clicking View Report

IBM Cognos for Microsoft Office is functioning normally, but you cannot use the View Report option to view reports. The client machine, running IBM Cognos for Microsoft Office, cannot connect to the gateway URL as configured in IBM Cognos Analytics. This may be because it is behind a firewall, the hostname/DNS is not known to this client machine, or the client machine has proxy issues.

To resolve the connectivity issues, work with your system administrator.

Cognos Office Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the IBM Cognos Office log.

COI-ERR-2002 Block type is not valid

An internal processing error occurred. The block object was not able to be processed.

Contact IBM Cognos Resource Center. Be ready to supply all relevant logs and details related to this error.

COI-ERR-2003 Unexpected type: *stacked block*

An internal processing error occurred. The data object was not of the expected type and could not be processed.

Contact IBM Cognos Resource Center. Be ready to supply all relevant logs and details related to this error.

COI-ERR-2005 This version of Microsoft Office is not supported

IBM Cognos Office supports only specific versions of Microsoft Office applications.

Load the report content into one of the supported applications and environments.

To review an up-to-date list of environments supported by IBM Cognos Office products, including operating systems, patches, browsers, web servers, directory servers, database servers, and application servers, go to the IBM Support Portal for IBM Cognos Analysis for Microsoft Excel or the IBM Support Portal for IBM Cognos for Microsoft Office.

COI-ERR-2006 This Microsoft Office product is not supported

IBM Cognos Office supports only specific Microsoft Office applications, such as Microsoft Excel, Microsoft Word, and Microsoft PowerPoint. You cannot load IBM Cognos Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

To review an up-to-date list of environments supported by IBM Cognos Office products, including operating systems, patches, browsers, web servers, directory servers, database servers, and application servers, go to the IBM Support Portal for IBM Cognos Analysis for Microsoft Excel or the IBM Support Portal for IBM Cognos for Microsoft Office.

COI-ERR-2008 Unable to Retrieve from Resources. Tried '{0}'

An internal processing error occurred.

Contact IBM Cognos Resource Center. Be ready to supply all relevant logs and details related to this error.

COI-ERR-2009 Unable to Perform This Operation Because Microsoft Excel is in Edit Mode

Report content cannot be refreshed while one of the cells of the workbook is being edited.

Click outside the active cell to return it to a non-edit mode and try again.

COI-ERR-2010 The name {0} is not valid. A name must not contain both a quote (") character and an apostrophe (') character

When you create a folder, rename a folder, or publish a document, the name can contain an apostrophe or a quote, but not both.

To resolve this problem, rename the folder or document. Exclude the apostrophe or quote character from the name.

COI-ERR-2011 The server did not return the expected response. Check that the gateway is valid.

This error message is displayed if the value entered in the System Gateway URI box of the Options dialog box is not a valid IBM Cognos Analytics server.

To resolve this problem, reenter the **System Gateway URI** with the gateway address for a valid IBM Cognos Analytics server.

COI-ERR-2012 Prompted metadata is not supported

Although reports with prompted data are supported by IBM Cognos for Microsoft Office, prompted metadata is not.

Import a report that does not require prompted metadata or create defaults for the prompted metadata.

COI-ERR-2013 Unable to load metadata

You may be unable to load metadata because you do not have security rights to all of the items in the worksheet or because the items were removed or changed on the server.

Ensure that you have security rights to all of the items that you are trying to view. If this does not fix the problem, ensure that the server and package information are correct and that any items that have been removed from the source database are also removed from the worksheet.

COI-ERR-2014 Help file not found

The help file is missing or corrupted.

To fix the problem, re-install your IBM Cognos component, such as IBM Cognos Analysis for Microsoft Excel or IBM Cognos for Microsoft Office.

COI-ERR-2015 There was a problem parsing the MIME encoded server response. Tried to find the boundary [{0}] but found the boundary [{1}] instead

While using GZip compression, an option for compressing data that is retrieved from the server, an error occurred. The codes to decompress the data are missing or unrecognized by IBM Cognos Office.

Turn compression off. Although compression is turned on by default, it can be turned off by setting the UseGzipCompression property to false in the CommManagerSettings.xml file, which, by default, is located in the Office Connection directory, such as C:\Documents and Settings*user name*\Local Settings\Application Data\Cognos\Office Connection or C:\Users*user name*\AppData\Local\Cognos\Office Connection.

Turn compression off if you need to run tests or perform troubleshooting.

To turn gzip compression off set the following attribute:

<setting name="UseGzipCompression">False</setting>

Report Data Service Numbered Error Messages

The following error report data service (RDS) messages may appear in a dialog box and are recorded in the server log, which is located at c10_location/logs/cogserver.log.

RDS-ERR-1000 Report Data Service Could Not Process the Response from the Content Provider

This error may occur for the following reasons:

- In WebSphere®, this error occurs if another XML parser, such as Xalan is colliding with the one Report Data Service uses.
- In BEA WebLogic, this error occurs if the JAVA_OPTIONS variable has not been set with the correct parser information.
- This error can also occur if a package from a previous version of IBM Cognos Analytics (or ReportNet) was deployed to IBM Cognos Analytics without the report specifications being upgraded.
- Another possible reason for this error message is that Report Data Service cannot handle the report. For example, this error occurs if a IBM Cognos Report Studio report contains a block with either of the following:
  - a repeater or repeater table inside a block or a table
  - a layout object, such as a list, crosstab, chart, or text object in a conditional block inside another block or a table

Set the Class Loader Policy in WebSphere

For WebSphere, the best solution is to set the Class loader policy to **PARENT_LAST**. The WebSphere documentation tells the administrator how to do this.

Set the JAVA_OPTIONS Variable in WebLogic

If you are accessing IBM Cognos for Microsoft Office through IBM Cognos Analytics on a BEA WebLogic Application Server add the following to the JAVA_OPTIONS variable of the startManagedWebLogic.cmd (Microsoft Windows operating system) or startManagedWebLogic.sh (UNIX operating system) script file:

```
-Dorg.xml.sax.driver=org.apache.xerces.parsers.SAXParser
```

Upgrade Report Specifications

Follow the steps for "Upgrading Report Specifications" in the *IBM Cognos Business Intelligence Administration and Security Guide*.

Edit the Report

To avoid problems with report layout, you must modify the report by performing one of the following:

- Take the repeater or repeater table out of the block or table.
- Cut the layout object from the conditional block into a new conditional block, block, or table.

RDS-ERR-1001 The PowerPlay Report [Name]...

The PowerPlay Report [Name] Could Not Be Run. The Expected Response Was Not Returned by PowerPlay

To resolve this problem, ensure that PowerPlay is functioning properly. The user should check to see that the PowerPlay server is running, or check the PowerPlay logs for errors. If IIS is being used for the Web server, ensure that Anonymous Access is enabled. For more information, see the *IBM Cognos Business Intelligence Installation and Configuration Guide.*

RDS-ERR-1003 The file could not be read

Cognos Content service could not read the system files. One cause is that one or more of the system files was accidentally deleted from the installation directory, corrupting the installation of IBM Cognos Analytics.

For example, you may get an error that is similar to the following:

```
c10_installation\templates\ccs\xslt\ppes\pptrans.xslt could not be read
```

To resolve this problem, reinstall IBM Cognos Analytics. For more information, see the *IBM Cognos Analytics Installation and Configuration Guide.*

RDS-ERR-1004 A Connection Could Not Be Established with IBM Cognos BI

IBM Cognos Analytics is not responding.

Check the IBM Cognos Analytics logs. Ensure that IBM Cognos Analytics is functioning properly.

RDS-ERR-1005 The Logon Requirements for IBM Cognos BI Could Not Be Obtained

A message indicates that you may already be logged into this namespace, or the target namespace does not exist. Generally, this error occurs when trying to log on to the same namespace twice. In some cases, it may indicate a problem with a security setup such as SiteMinder.

Ensure that you are not already logged in.

RDS-ERR-1011 Report Data Service was unable to retrieve the locale

At system startup, IBM Cognos Content service makes a request for the locale of the system and the request fails.

Contact customer support, and be prepared to provide the cogserver.log file.

RDS-ERR-1012 IBM Cognos Content Service was Unable to Discover the Content Providers

This error usually appears in conjunction with RDS-ERR-1028 and means that Report Data Service could not communicate with any PowerPlay providers. (RDS-ERR-1028 can occur separately if there is more than one PowerPlay server, and only one has failed).

Check that all instances of PowerPlay Enterprise Server are running properly.

RDS-ERR-1013 Report Data Service Was Unable to Query Content Manager

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1014 Report Data Service Was Unable to Create the Document Object *Object Name*

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1015 Report Data Service Was Unable to Create a New Document Version

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1016 Report Data Service Was Unable to Create a New Document Content Object

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1018 The IBM Cognos BI Report [Name] Could Not Be Run

A message indicates that the expected response was not returned by IBM Cognos Analytics. An error was returned by IBM Cognos Analytics when the report was run or refreshed. One of the following may be the cause:

- PowerPoint does not contain the necessary facilities to recreate the rich formatting and layout of this report.

  Check the IBM Cognos Analytics error log for troubleshooting information. If the report in question was not able to be rendered, adjust the report to remove the formatting and layout to expose the data in PowerPoint, where you can modify formatting and layout.

- You tried to refresh a Series 7 PowerPoint report that was migrated to IBM Cognos Analytics. Series 7 content is not accessible from the Series 7 PowerPlay Enterprise Server, and the IBM Cognos Report Data Service (RDS) is attempting to resolve the path of the PowerCube data source.

  In IBM Cognos for Microsoft Office, ensure that the value of the Search Path property of the report matches the search path of the same report that was migrated to IBM Cognos Analytics and published to IBM Cognos Connection.

- For prompted reports in IBM Cognos for Microsoft Office using Microsoft Excel, if you have set, in the Properties pane, prompt values to be retrieved from a cell reference and the value in the cell reference is invalid for the prompt, you receive this error message.

  We recommend that you select Always Prompt as this is the best practice for prompted reports.

  For more information, and to determine if this is the exact cause for this error message, see the IBM Cognos Analytics server log file.

  Search for this error message, RDS-ERR-1018 and then look for error messages similar to the following:

  Failure QFS-ERR-0139 The request has multiple errors. RQP-DEF-0354 The query contains one or more unresolved prompts. QE-DEF-0385 Invalid format for prompt 'Parameter1'. Expected format is unknown.

RDS-ERR-1019 IBM Cognos Content Service Was Unable to Retrieve the Portal Information from IBM Cognos Connection

IBM Cognos Analytics may have stopped processing.

Ensure that IBM Cognos Analytics is started.

RDS-ERR-1020 The Currently Provided Credentials are Invalid

A message indicates that you provide the logon credentials Your user name and password are not correct.

Ensure that you type a valid user name and password.

RDS-ERR-1021 The IBM Cognos BI Report [Name] Could Not be Run Because it Contains Unanswered Prompts.

A message indicates that you provide the prompt answers, and run the report again. The report has prompts that have not been set.

You must open the report and then save a version of the report with the desired prompt answers before importing the content into IBM Cognos for Microsoft Office.

Note: If you are using Microsoft IIS version 7.0 or 7.5 as your Web server to run IBM Cognos Analytics products, and it has not been configured to support IBM Cognos for Microsoft Office, the program stops responding and you will not prompted for a value. To resolve this issue, see

RDS-ERR-1022 The Request Received by Report Data Service Is Not Valid

This error message may indicate that someone is trying to externally access the Report Data Service.

Stop and restart the Report Data service.

RDS-ERR-1023 The Report [Name] Could Not Be Run Because It Exceeds the Report Data Service Data Size Limit Set by the Administrator

A report fails because it exceeds the data size limit set by the administrator. The default limit for IBM Cognos for Microsoft Office is 10 MB.

Increase the size limit for report data by changing the Governor limit setting. For more information, see the *IBM Cognos Business Intelligence Administration and Security Guide*.

RDS-ERR-1027 The Encoding for the PowerPlay Server [Name] Could Not Be Determined

A message indicates that ISO-8859-1 will be used as the encoding. This error message may be displayed if PowerPlay is not responding.

Ensure that PowerPlay is started and functioning properly.

RDS-ERR-1030 A Security Error Occurred While Trying to Establish a Connection

The CA certificate was not installed into Report Data service.

Install the CA certificate.

RDS-ERR-1031 Report Data Service was unable to retrieve the metadata for [Report Name]

The provider, such as IBM Cognos Analytics or PowerPlay is not responding.

Ensure that IBM Cognos Analytics or PowerPlay is running. Check the server log for error messages related to these providers.

RDS-ERR-1033 Report Data Service Was Unable to Create the Report View [Name]

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1034 The Report Specification for [Report Name] Could Not Be Retrieved From IBM Cognos BI

This message occurs if the metadata could not be retrieved from IBM Cognos Analytics.

Ensure that IBM Cognos Analytics is running. Check the server log for error messages related to IBM Cognos Analytics.

RDS-ERR-1037 The Configuration for Report Data Service could not be updated

Communication with Content Manager failed.

Ensure that Content Manager is running and that other services are able to communicate with Content Manager.

RDS-ERR-1038 The server locale could not be determined

The attempt to identify the server locale failed.

Contact customer support.

RDS-ERR-1039 The Request Could Not Be Cancelled

A message indicates that the request is no longer running. This error occurs if a user (or administrator) tries to cancel an Report Data Service request, but the request no longer exists. This can happen if the user clicks **Cancel** after the administrator has already restarted Report Data Service.

Wait for Report Data Service to restart.

RDS-ERR-1040 The Conversation With [Request ID] Has Been Cancelled

This message appears in the audit log if a request is cancelled by either the user or the administrator. Users can cancel their own requests. Administrators cannot cancel specific requests, but can cancel all requests by stopping and restarting the service.

Stop the service and abandon all running requests.

By using this method, you can cancel long running requests, such as running a report.

Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **Launch**, **IBM Cognos Administration**.
2. On the **Status** tab, click **System**.
3. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change View** menu. Click **Services**, and then **Report Data**.
4. With the Report data service displayed, click the arrow to view the **Actions** menu next to the service, and then click **Stop immediately**.

RDS-ERR-1041 The object [object ID] could not be deleted

A session object could not be deleted because it does not exist. Another service may have removed the object as IBM Cognos Content service tries to cleanup other objects.

RDS-ERR-1042 Prompt answers could not be found

Answers to prompts in a report that were saved do not exist.

The probable cause is that the session may have timed out or a server failover occurred during the time the Prompt dialog box closed and the data was retrieved from the IBM Cognos Analytics server.

Run the report again and provide answers to all the prompts in the report.

RDS-ERR-1043 Unable to parse style definition

The server is unable to parse a report style that is defined in the report specification.

Ensure that the report specification is valid. If the report specification is valid, and this error message appears, contact IBM support.

RDS-ERR-1044 The Output for the Requested Version for Object [Object ID] Could Not be Retrieved

The report output version that you want to run cannot be retrieved from the content store.

This problem can be caused by one or more of the following:

- the requested report version name, specified burst key, or burst ID, does not exist
- the requested version does not have any outputs that meet any of the accepted formats, such as XML, PDF, or HTML

  The report author did not specify a default format to be used when the report is run.
- you do not have sufficient access permissions to retrieve this output

To run the report, you must have read permission for the report and traverse permissions for the folder that contains the report.

RDS-ERR-1045 LayoutDataXML Output Was Not Generated for the Requested Version for Object [*Object ID*]

The report version you want to run exists in the content store, but was not saved with the LayoutDataXML output.

When the report output version is saved, the report author must select the **Enable enhanced user features in saved output version** check box in IBM Cognos Connection.

For more information, see the *IBM Cognos Connection User Guide*.

RDS-ERR-1047 Unable to process the XML output stream

The XML is invalid, and there is failure with the RSVP.

To resolve this problem, do one of the following:

- Ensure that you can run the report in IBM Cognos Viewer and try accessing or viewing the last page of the report.
- Check the server log for the RSVP error message. Refer to the RSVP Error Message guide for help with the problem cited in the error log.

RDS-ERR-1048 Unable to Process the Context Selection Specification *\<selection specification\>*

Unable to parse an agent specification for a watch item on a saved report.

Examine the server logs for RSVP or ASV errors.

RDS-ERR-1049 Report Data Service was Unable to Create an Object in the Content Store

The item could not be saved to IBM Content Manager.

Examine the server log for RSVP errors.

RDS-ERR-1050 Drill Operation on the IBM Cognos BI Report

You are unable to drill up or drill down in the report.

Examine the log for RSVP errors.

RDS-ERR-1053 The Credential Format Received by Report Data Service is Invalid

A credential passed to the Report Data service authentication service is invalid.

Verify that the XML credential validates against the schema, and that the values correspond to the missing value definitions of the logon request.

RDS-ERR-1055 An Error Occurred Trying to Load the Supported Conversion Formats

The installation of IBM Cognos Analytics is corrupted.

Reinstall IBM Cognos Analytics.

RDS-ERR-1057 A Runtime Error Occurred While Report Data Service Was Processing the Request

An error that was not handled occurred in the Report Data Service.

Contact customer support.

IBM Cognos for Microsoft Office Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the IBM Cognos for Microsoft Office log.

COC-ERR-2005 The Import Failed

An unknown issue caused the import of report content to fail.

Other possibilities may include

- the logon requirements for IBM Cognos Analytics are not available. You may already be logged onto this namespace, or the target namespace does not exist.
- protection for the Excel workbook structure exists

The protection prevents users from adding or deleting worksheets or from displaying hidden worksheets.

- no workbook, document, or slide is open in the Microsoft Office application.

Check that your report uses standard practices. Revise and resave the report, ensuring that text and images are not located in the same cell.

If the workbook structure is protected, ensure that the **Structure** check box in the **Protect Workbook** dialog box is cleared. In Excel, from the **Tools** menu, click **Protection**, and then click **Protect Workbook**. In the **Protect Workbook** dialog box, clear the **Structure** check box, and then click **OK**.

Ensure that you have a workbook, document, or slide open in the Microsoft Office application to which you want to import report content.

COC-ERR-2006 Failed to Load the Portal Tree

This error occurs while attempting to log on to the IBM Cognos Analytics Server from an IBM Cognos for Microsoft Office session. You must install .NET Framework version 4.0 or later.

It may be because .NET Framework version 4.0 or later is not installed, or it may be a connectivity issue. It may also mean that the IBM Cognos Analytics service has stopped.

As documented in the *IBM Cognos for Microsoft Office Installation Guide,* to deploy IBM Cognos for Microsoft Office, you must first install Microsoft .NET Framework version 4.0 or later on the client workstation.

If you have already installed the required Microsoft .NET framework, check for LAN connectivity issues. Restart the IBM Cognos Analytics service.

COC-ERR-2014 Refresh Failed

IBM Cognos for Microsoft Office cannot refresh report content. Another error message should indicate why. If there is no other error message, the problem is outside IBM Cognos for Microsoft Office. This may indicate a system problem, a server malfunction, or no LAN connectivity.

Attempt to refresh the content again. Check system and server functions.

COC-ERR-2015 Failed to Open the Import Wizard Dialog

When the IBM Cognos for Microsoft Office Import Content wizard loads, it pages through the report and populates the tree and creates a page for each report element. If an unexpected error occurs in the report, this error is logged.

Try importing the report again. If it fails, open the report in the studio in which is was created and save the report. Check the log file for more detailed information.

COC-ERR-2301 Logon Failed

Your user name and password are not correct.

Ensure that you enter a valid user name and password.

COC-ERR-2303 This Report Is Not Valid for Rendering

IBM Cognos for Microsoft Office cannot render a top report, where a report is nested within another report.

Take the report out of its nested report and resubmit the request.

Procedure

1. Redesign the report.
2. Save the report.

3. Import the saved report into IBM Cognos for Microsoft Office.

COC-ERR-2305 Microsoft Excel Returned an Error

A message indicates that you should ensure that Microsoft Excel is not in edit mode, then try again. Report content cannot be refreshed while one of the cells of the workbook is being edited.

Click outside the active cell to return it to a non-edit mode and try again.

COC-ERR-2308 Report Specification is Empty

The report you attempted to import into IBM Cognos for Microsoft Office has no content. To import a report, it must have content.

Choose another report to import, or finish authoring the report before attempting to import it.

COC-ERR-2603 You Must Add a Slide to the Presentation Before Importing Any Content

The presentation has no slides. IBM Cognos for Microsoft Office requires at least one slide in the presentation for the Import Content wizard to start.

Add a slide to the presentation and then try to import report content again.

COC-ERR-2607 *Microsoft Office Message*

During initialization, you receive an error, COC-ERR-2607, and, in some instances, a Microsoft Office message, such as:

File or assembly name Microsoft.Office.Interop.ApplicationName, or one of its dependencies, was not found.

This error indicates that a required application or the .NET support for one of the required Microsoft Office applications is not installed.

Microsoft Office Excel, PowerPoint, and Word, and Microsoft .NET Programmability support for all three of these applications is required for IBM Cognos for Microsoft Office to work properly.

Ensure that you have installed all three Microsoft Office applications and that the Microsoft .NET support is enabled. For more information, see the *IBM Cognos for Microsoft Office Installation Guide*.

COC-ERR-2609 The Custom property [Property_Name] does not exist

You have imported a prompted report and have specified a name for Custom Property in the Properties pane that does not match the custom document property name in the Microsoft Office Properties dialog box.

In IBM Cognos for Microsoft Office, in the **Properties** pane, for each prompt, ensure that the value specified in the **Custom Property** box, matches the value specified in the custom document property in the Microsoft Office **Properties** dialog box (**File**, **Properties**, **Custom** tab). Ensure that there are no leading and trailing character spaces in the name of the custom document property.

Appendix A. Accessibility features

IBM Cognos for Microsoft Office 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 IBM Cognos for Microsoft Office:

- You can use accelerators and command keys to navigate through IBM Cognos for Microsoft Office.

  In Microsoft Windows, press the Alt key, then the accelerator to trigger an action; for example, Alt+F shows the File menu. If they are enabled, you can use extended accelerators as well.

- IBM Cognos for Microsoft Office 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.

- IBM Cognos for Microsoft Office supports your system's display settings, such as color scheme, font size, and high-contrast display.

IBM Cognos for Microsoft Office has other features that you can customize to fit your individual needs:

- "Increasing font size for future sessions" on page 117
- "Viewing reports or report items in Windows High Contrast Mode" on page 117

Keyboard navigation

You can use keyboard shortcuts to navigate and perform tasks. If an action you use often does not have a shortcut key, you can record a macro in Microsoft Excel to create one.

This product uses standard Microsoft Windows navigation keys in addition to application-specific keys.

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

Access and use menus

Keyboard shortcuts allow you to access menus and the IBM Planning Analytics ribbon without using a mouse or other pointing device.

Note: Shortcut keys may vary depending on the individual setup and operating systems used.

Table 17. IBM Planning Analytics ribbon	
Action	**Shortcut keys**
Start IBM Planning Analytics for Microsoft Excel or IBM Cognos for Microsoft Office.	ALT+Y, to place focus on the IBM Planning Analytics tab in the ribbon.
When an item on the IBM Planning Analytics tab is selected, select the next or previous button or menu on the tab.	LEFT ARROW, RIGHT ARROW, UP ARROW, or DOWN ARROW
Select the first or last command on the menu or submenu.	HOME or END
Open the selected menu, or perform the action for the selected button or command.	ENTER

Table 17. IBM Planning Analytics ribbon (continued)

Action	Shortcut keys
Open the context menu for the selected item or area of focus.	SHIFT+F10
Close an open context menu.	ESC

Access and use the task pane

Keyboard shortcuts allow you to access the task pane without using a mouse or other pointing device.

Table 18. Task pane

Action	Shortcut keys
Selecting a database to log onto. **Note:** A menu or the IBM Planning Analytics tab must be active when performing this action.	Office 2013 and 2016 users: • Move the focus to the task pane by holding Shift and pressing F6 3 times. **Note:** The focus will be moved to the task pane, however, there is no visual representation to indicate this. • Select the server by pressing tab 2 times. The **Open** icon will be highlighted. Press SPACE and then press the DOWN ARROW to open and navigate the sub menu. • Select the database by pressing the RIGHT ARROW and then pressing ENTER.
When the task pane is active, select a component, such as IBM Planning Analytics for Microsoft Excel or IBM Cognos for Microsoft Office	Office 2013 and 2016 users: LEFT ARROW or RIGHT ARROW Office 2010 users: CTRL+TAB LEFT ARROW or RIGHT ARROW
When the IBM Cognos Office pane is active, select the next or previous option in the pane.	Office 2013 users: TAB Office 2010 users: CTRL+TAB
Place the focus on the metadata tree.	CTRL+M, T
Place the focus on the overview area of an Exploration View.	CTRL+M, U

Use filter window

Keyboard shortcuts allow you to use the **Edit Filter** window without using a mouse or other pointing device.

Table 19. Edit Filter window	
Action	**Shortcut keys**
When the **Edit Filter** window is active, change the focus on controls by moving between buttons, filter lines and conjunctions, which are the AND and OR operators.	TAB
Toggle the expression between AND and OR when a conjunction control is active.	SPACE KEY
When a conjunction control, such as AND and OR operators are active, compress the expression.	LEFT ARROW MINUS KEY (-) on the numeric keypad
When a conjunction control, such as AND and OR operators are active, expand the expression.	RIGHT ARROW PLUS KEY (+) on the numeric keypad

Use windows

Keyboard shortcuts allow you to access dialog boxes without using a mouse or other pointing device.

Table 20. Dialog boxes or windows	
Action	**Shortcut keys**
Move to the next option or option group.	TAB
Move to the previous option or option group.	SHIFT+TAB
Move between options in an open drop-down list, or between options in a group of options.	Arrow keys
Perform the action for the selected button, or select or clear the selected check box.	SPACEBAR
Open the context menu, if it is closed, and move to that option in the context menu.	SHIFT+F10, then press the first letter of an option in a drop-down list
Open the selected drop-down list.	DOWN ARROW First letter of an option in a drop-down list
Close the selected drop-down list.	Office 2013 users: ESC Office 2010 users: First letter of an option in a drop-down list
Expand or collapse a folder.	Office 2013 users: RIGHT ARROW, LEFT ARROW Office 2010 users: CTRL+ENTER

Table 20. Dialog boxes or windows (continued)

Action	Shortcut keys
Cancel the command and close the window.	ESC
Open the **Select Package** dialog box.	CTRL+M, O
When the **Open** dialog box is active, open the selected report locally.	ENTER
When the **Select Package** dialog box is open, select a package.	Office 2013 users: TAB, to place focus on the **System** box DOWN ARROW, to select a Cognos system ENTER to view the packages Office 2010 users: TAB, to place focus on the **System** box ENTER to view the packages
When the **Publish** dialog box is active and the appropriate folder is expanded, publish the selected Microsoft Office document.	After selecting the file name, tab to the Publish button and press ENTER.
In IBM Cognos for Microsoft Office, move to a tab page, such as the **Browse Content** or the **Manage Data** page, on the IBM Cognos pane.	CTRL+TAB

Use tree view

Keyboard shortcuts allow you to access tree view without using a mouse or other pointing device.

Table 21. Tree view

Action	Shortcut keys
Move to the first selectable node. If the node has children and the child node is expanded, move to the first child node.	DOWN ARROW
Move to the next selectable node.	UP ARROW or DOWN ARROW
Expand the selected node, or move to the first selectable child node	RIGHT ARROW
Collapse the selected node, move to the parent node, or move to the first selectable node.	LEFT ARROW
Move to the first node in a tree control.	HOME
Move to the last node in a tree control.	END

Interface Information

The following sections describe various ways that you can customize your settings to make IBM Cognos for Microsoft Office more accessible.

Increasing font size for future sessions

It is best to change the size of your IBM Cognos Office fonts by changing your display fonts in Windows. (Changing your Windows display fonts affects all programs on your computer.) For more information, refer to Windows Help.

Note: In Microsoft Windows XP, selecting the **Large size** option in the **DPI setting** field will not have the desired effect in IBM Cognos Office. You must select **Custom** setting and then select the percentage to scale to.

Viewing reports or report items in Windows High Contrast Mode

Microsoft Windows users with low vision can make IBM Cognos for Microsoft Office easier to view by enabling High Contrast Mode. For more information, see the documentation for your operating system.

Vendor software

IBM Cognos for Microsoft Office includes 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

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

http://www.ibm.com/able

Appendix B. Sample reports and packages

The IBM Cognos for Microsoft Office products include sample reports and packages that are based on the sample company, The Sample Outdoors Company. After the samples are set up, you can find the samples in Public Folders in IBM Cognos Connection, and in the source tree on the IBM Cognos pane.

The Sample Outdoors Company

The Sample Outdoors Company samples illustrate product features and technical and business best practices. You can also use them for experimenting with and sharing report design techniques and for troubleshooting. As you use the samples, you can connect to features in the product.

The Sample Outdoors Company, or GO Sales, or any variation of the Sample Outdoors name, is the name of a fictitious business operation whose sample data is used to develop sample applications for IBM and IBM customers. Its 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. Unauthorized duplication is prohibited.

Samples outline

The samples consist of the following:

- Two databases that contain all corporate data, and the related sample models for query and analysis
- Sample cubes and the related models
- A metrics data source including associated metrics and a strategy map for the consolidated company, and a model for Metric extracts.
- Reports, queries, query templates, and workspaces

  To run interactive reports, scripts are required. To see all the reports included in the samples packages, copy the files from the samples content installation into deployment folder and then import the deployments into the IBM Cognos Business Intelligence product.

Security

Samples are available to all users.

To implement security, see the IBM Cognos Business Intelligence *Administration and Security Guide*.

The Sample Outdoors Group of Companies

To make designing examples faster, especially financial examples, some general information about The Sample Outdoors Company is useful. To look for samples that use particular product features, see the individual sample descriptions in this section.

Revenue for The Sample Outdoors Company comes from corporate stores and from franchise operations. The revenues are consolidated from the wholly-owned subsidiaries. There are six distinct organizations, each with its own departments and sales branches. Five of these are regionally-based companies.

The sixth company, GO Accessories:

- Has its own collection of products, differentiated from the other GO companies by brand, name, price, color and size.
- Sells from a single branch to all regions and retailers.
- Functions both as an operating company based in Geneva, and as a part owner of the three GO subsidiaries in Europe.

The following diagram illustrates the consolidated corporate structure of the Sample Outdoors Company. The diagram also includes the percentage changes in ownership for GO Central Europe, and the reporting currency and GL (general ledger) prefix for each subsidiary. In year 1, GO Asia Pacific owns 60% of GO Central Europe, and in year 3, its ownership decreases to 50%. In year 1, GO Accessories owns 40% of GO Central Europe, and in year 3 its ownership increases to 50%.
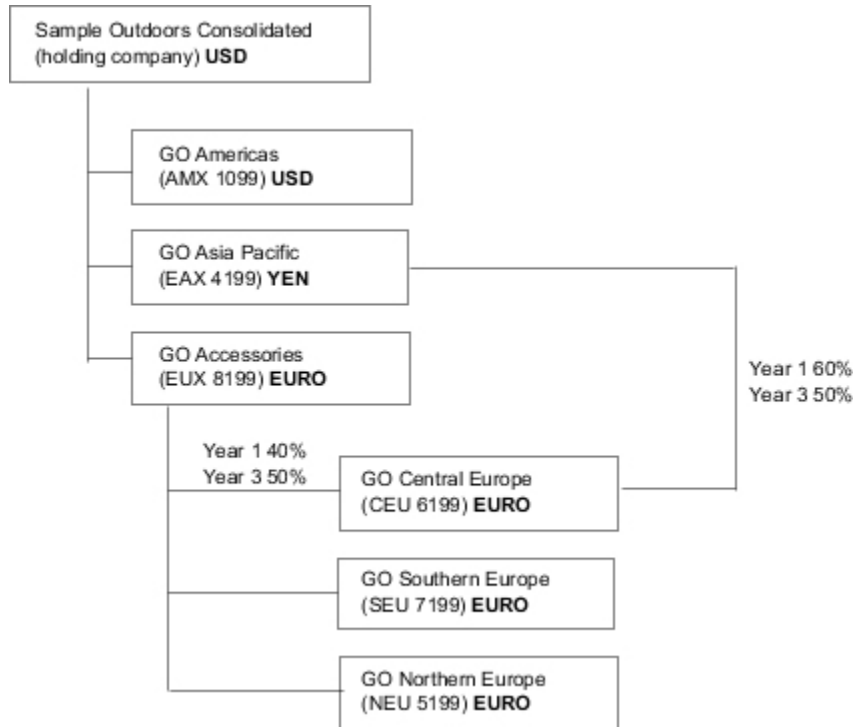
Figure 3. Consolidated corporate structure of the Sample Outdoors Company

Each corporation in the Sample Outdoors Company has the same departmental structure and the same general ledger (GL) structure, as shown in the following table. Divisions may not report in the same currencies. For example, the Americas subsidiary reports in US dollars, but the Corporate division local currency reports in Canadian dollars, and the Operations division local currency is pesos.

Table 22. Departmental structure	
Division (GL)	**Department (GL)**
Corporate (1700)	Sales (1720)
	Marketing (1750)
	IS&T (1760)
	Human Resources (1730)
	Finance (1740)
	Procurement (1710)
Operations (1800)	Production and Distribution (1820)
	Customer Service (1820)

Each corporation has a complete chart of accounts. Most of the accounts, such as those under non-personnel expenses, are at the department level, and contain only summary amounts. For example, although each marketing department has expenses, the cost is unspecified at the transaction level where marketing promotions occur.

Employees

The Sample Outdoors data contains a full list of employees in all divisions, departments, and locations.

Data is available for reports about bonuses (Global Bonus report) and sales commissions (Sales Commissions for Central Europe report), training (Employee Training by Year report), and performance reviews and employee satisfaction surveys (Employee Satisfaction 2012). If you use Metric Studio, sample metrics for human resources are also available.

In the GO Data Warehouse (analysis) package, groups of measures and the related dimensions are organized into folders. The employees are organized in hierarchies for region and manager, to make different kinds of aggregation easy to report on. Aggregation has been defined for the Employee Position Summary measures, so that Position count and Planned position count aggregate correctly at each level of time: monthly, quarterly, or yearly. For example, see the Planned Headcount report.

The employees are also listed in a sample LDIF file which could be used for any LDAP IBM product authentication including Tivoli®. This authentication directory is necessary for IBM Cognos Planning samples. No other samples depend on security profiles.

Sales and marketing

Data about sales and marketing is available for all of the companies in the Sample Outdoors group.

GO Accessories has richer details to support analysis examples. For example, see the Revenue vs % Profit Margin by Product Brand analysis, based on the Sales and Marketing cube. Marketing and sales campaigns are tied to the Sample Outdoors regional companies.

Overall, the GO companies have experienced solid growth across most product lines (Sales Growth Year Over Year), in all regions (Revenue by GO Subsidiary 2011), because of factors like an increase in repeat business and new or improved products, such as the high margin sunglasses product line. In the product lines sold by the five regional companies (all but GO Accessories) promotions have had mixed success (Promotion Success by Campaign, Bundle and Quarter). If you use Metric Studio, this can also be seen in the sample metrics.

Customer surveys

The data also contains information from customer surveys. For example, the product line that includes bug spray, sun screen, and so on has not been successful (Product Satisfaction - Outdoor Protection 2011) and a source of retailer dissatisfaction may be the level of customer service rather than the returns (Customer Returns and Satisfaction). If you use Metric Studio, this information can also be monitored in metrics.

Sales outlets

Revenue from the corporate outlets is available at the transaction level. Revenue from the franchise outlets is available at the consolidated level only (Sales and Marketing cube). Metrics about retailers show that the number of new retail outlets has dropped over the time period covered by this data.

GO Accessories sells worldwide, and sells only accessories. Transaction data for GO Accessories is the primary source for analysis of product by brand, color and size. The other five subsidiaries in the group of companies are regional and sell all product lines for retailers in their region. For example, the report Top 10 Retailers in 2011 uses sparklines and list data to review revenues at the retailer level.

Sample Outdoors Company models, Powercubes, and packages

The sample Outdoors Company Framework Manager models that are included with the extended samples illustrate modeling techniques and support the samples. The models are based on the GO data warehouse and the GO sales transactional databases and are the basis for the sample reports and queries. Each model contains two packages for publishing analysis (dimensional) and query views of the data.

To look at the sample models, you must have access to Framework Manager, the modeling tool in IBM Cognos Business Intelligence. You also need to set up the sample databases and connections. See Downloading and configuring the extended samples.

GO Data Warehouse

The GO Data Warehouse model, `great_outdoors_data_warehouse.cpf`, is based on the database GOSALESDW. It contains data about human resources, sales and marketing, and finance, which is grouped into business areas. In the Database view, the three business areas are grouped into separate namespaces. The Database view contains a fourth namespace (GO Data) for the common information.

The Database view is similar to the structure of the underlying database. All tables (database query subjects) are unchanged. This enables IBM Cognos Analytics to retrieve metadata directly from the package in most cases, instead of using a metadata call to the database. The following changes and additions were made in the Database view:

- Joins were added as necessary.
- To allow for aggregation at different levels of granularity, some model query subjects were created. For example, see the relationships between Time and Sales or Sales fact.
- To allow single joins to be made between the lookup tables and each level in a dimension, lookup tables were copied. For example, see the Products look up tables.

The Business view contains only model query subjects, with no joins. The following changes and additions were made in the Business view:

- Calculations were added to the model query subjects. For example, the time dimension contains language calculations.
- Where the database has multiple hierarchies, new dimensions were created to organize each hierarchy. For example, the employee hierarchies are organized into several categories, such as manager and region.

The GO Sales transactional database

The GO Sales model, `great_outdoors_sales.cpf`, is based on the GOSALES database, which is structured as a transactional database. It contains principally sales data.

The Database view is similar to the underlying database structure. The following changes and additions were made in the Database view:

- To make it possible to join the fact tables to the time dimension, model query subjects and multipart joins are used.
- Other joins were added as necessary.

The Business view contains only model query subjects, with no joins. The following changes and additions were made in the Business view:

- Calculations were added to the model query subjects.
- Model query subjects that were created in the Database view to enable joins on the time dimension were linked as reference shortcuts.
- Where the database has multiple hierarchies, new dimensions were created to organize each hierarchy.
- Sales Staff is a subset of the slowly changing Employee dimension. There is no unique Employee key in GO Sales, so a filter retrieves the current record only. This model does not use historical data.

The samples PowerCubes

The following cubes are delivered with the Sample Outdoors samples in English, French, German, Japanese, and Chinese:

- `sales_and_marketing.mdc`
- `employee_expenses.mdc`
- `go_accessories.mdc`
- `go_americas.mdc`
- `go_asia_pacific.mdc`
- `great_outdoors_sales_en.mdc`
- `great_outdoors_7.mdc`

The samples packages

The Sample Outdoors samples include six packages. A brief description of each available package is provided.

Go Data Warehouse (analysis) is a dimensionally modeled view of the GOSALESDW database. This package can be used in all studios, including IBM Cognos Analysis Studio. Using this package, you can drill up and down.

Go Sales (analysis) is a dimensionally modeled view of the GOSALES database. This package can be used in all studios, including Analysis Studio. Using this package, you can drill up and down.

Go Data Warehouse (query) is a non-dimensional view of the GOSALESDW database. This package can be used in all studios except Analysis Studio, and is useful for reporting when there is no need for drilling up and down.

Go Sales (query) is a non-dimension view of the GOSALES database. This package can be used in all studios except Analysis Studio, and is useful for reporting when there is no need for drilling up and down.

Sales and Marketing (cube) is an OLAP package, based on the `sales_and_marketing.mdc` cube.

Great Outdoor Sales (cube) is an OLAP package, based on the `great_outdoors_sales_en.mdc` cube.

Note: The OLAP packages, Great Outdoor Sales (cube), and Sales and Marketing (cube), are not multilingual. The `IBM_Cognos_PowerCube.zip` archive contains five versions of each package; one in English, French, German, Japanese, and Chinese. For more information about `IBM_Cognos_PowerCube.zip`, see Legacy Samples.

Samples in the GO Data Warehouse (analysis) package

The following are some of the reports found in the GO Data Warehouse (analysis) package and GO Office Report Samples.

Employee Satisfaction Workspace

This workspace shows different measures of employee satisfaction, like training, bonuses, and employee survey scores. The bonus list is filtered by country.

Return Quantity by Order Method

This report shows quantity sold, number of returns, and percentage of returns (with those greater than 5% highlighted) by return reason for each product in the Outdoor Protection product line. This report uses the following features:

- filters
- lists
- conditional highlighting

- grouping

Return Quantity by Product Line Chart

This pie chart report shows return quantities of product lines for all subsidiaries.

Revenue Data Workspace

The workspace shows revenue by region, by country and product type (filtered with multiple values check boxes), and by order method.

Samples in the GO Data Warehouse (query) package

The following reports are some of the reports found in the GO Data Warehouse (query) package and GO Office Report Samples.

Baselines

This chart report shows the numeric baselines, mean and percentage, based on prompt values that are used to filter on years.

Bursted Sales Performance Report

This list report shows how to burst a sales performance report to a manager of Northern Europe sales staff. To successfully burst this report, IBM Cognos 10 must be configured to use an email server. This report uses the following features:

- lists
- bursting
- conditional highlighting
- filters
- calculations
- summarizing
- blocks
- custom headers and footers
- sorting
- grouping

Samples in the Sales and Marketing (Cube) package

The following reports are some of the reports found in the Sales and Marketing (Cube) package and GO Office Report Samples.

Revenue by Product Brand

This report shows the revenue and gross profit by product filtered by the product brand. There is always product turnover, so the report conditionally highlights products that are discontinued. This report uses the following features:

- lists
- filters
- prompts
- combination charts
- bar charts
- HTML items

- grouping
- sorting
- axis titles

Samples in the GO Sales (analysis) package

The following reports are some of the reports found in the GO Sales (analysis) package and GO Office Report Samples.

Sales Summary

This report summarizes revenue and gross profit and shows the top sales representatives by revenue and quantity sold. This report uses the following features:

- lists
- filters
- combination charts
- axis titles
- custom headers and footers
- conditions

Samples in the GO Sales (query) package

The following reports are some of the reports found in the GO Sales (query) package and GO Office Report Samples.

Horizontal Pagination

This report shows a very wide Exploration View rendered across several horizontal pages. The first Exploration View shows the fit-to-page behavior, while the second Exploration View shows the horizontal pagination.

This report uses the following features:

- multiple pages
- horizontal pagination
- Exploration Views
- custom headers and footers

No Data

Each page of this report presents a different option for dealing with a No Data condition. It also generates invoices of sales for the Order Invoices - Donald Chow, Sales Person report in the GO Sales (query) package.

This report uses the following features:

- Exploration Views
- custom headers and footers
- no data
- lists

Appendix C. 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 127.
- 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 128.
- 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 128.

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.

Table 23. Permission requirements to view and import reports	
Goal	**Permissions**
View a report or a report output version, including reports in the result set of a search.	Execute and Traverse

Table 23. Permission requirements to view and import reports (continued)

Goal	Permissions
View the folder or package that contains the report.	Traverse
Import a report version with the most recent content changes. **Note:** The **Select a specific output version** 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.

Table 24. Permission requirements to view or edit a package or folder

Goal	Permissions
View the contents of a package or a folder, without full access to the content of the folder. **Note:** 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 25. Cognos Connection permissions to download Office documents	
Goal	**Permissions**
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 D. 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.

Table 26. IBM Cognos Office resource 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

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	cocmsgs.ja.resx	coimsgs.ja.resx
Kazakh	cormsgs.kk.resx	cocmsgs.kk.resx	coimsgs.kk.resx
Korean	cormsgs.ko.resx	cocmsgs.ko.resx	coimsgs.ko.resx
Norwegian	cormsgs.no.resx	cocmsgs.no.resx	coimsgs.no.resx
Polish	cormsgs.pl.resx	cocmsgs.pl.resx	coimsgs.pl.resx
Portuguese	cormsgs.pt.resx	cocmsgs.pt.resx	coimsgs.pt.resx
Romanian	cormsgs.ro.resx	cocmsgs.ro.resx	coimsgs.ro.resx
Russian	cormsgs.ru.resx	cocmsgs.ru.resx	coimsgs.ru.resx
Slovenian	cormsgs.sl.resx	cocmsgs.sl.resx	coimsgs.sl.resx
Spanish	cormsgs.es.resx	cocmsgs.es.resx	coimsgs.es.resx
Swedish	cormsgs.sv.resx	cocmsgs.sv.resx	coimsgs.sv.resx
Thai	cormsgs.th.resx	cocmsgs.th.resx	coimsgs.th.resx
Turkish	cormsgs.tr.resx	cocmsgs.tr.resx	coimsgs.tr.resx

Table 26. IBM Cognos Office resource files (continued)

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

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:

*componentcode*msgs.*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 *componentcode*msgs.*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.

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