IBM Cognos for Microsoft® Office

Version 10.1.0

User Guide
Table of Contents

Introduction 7

Chapter 1: What’s new? 9
   New features in version 10.1.0 9
      Support for standards for Section 508 of the U. S. Federal Rehabilitation Act 9
      Importing reports or report elements from dashboards 9
      Viewing business cards 10
   New features in version 8.4 10
      Importing PowerPlay cubes 10
      Test connection 10
      The Publish method 10
      Display of non-scaled values in Microsoft Excel 11
      Respecting soft page breaks 11
   New features in version 8.3 11
      Improved layout and rendering of report content 11
      Automatic assignment of names to specific report elements 11
      Importing stored and burst report versions 12
      Alternative method for setting prompt values 12
      Searching the content portal for reports and report content 12

Chapter 2: IBM Cognos Office 15
   The IBM Cognos Office window 15
      IBM Cognos toolbar 16
      IBM Cognos pane icons 17
   Getting started with IBM Cognos Office 17
      Start IBM Cognos Office 18
      Customizing IBM Cognos Office 19
      Log on to an IBM Cognos Business Intelligence server 23
      Clear Cache 23

Chapter 3: Working with Microsoft Office documents 25
   Refreshing data 25
   Clearing cells of content 25
   Converting dynamic data to static data 26
   Publishing a Microsoft Office document to IBM Cognos Connection 26
   Opening, saving, and downloading existing Microsoft documents 27
      Open and save a report locally from IBM Cognos Connection 27
      Download a Microsoft Office document from IBM Cognos Connection 28

Chapter 4: IBM Cognos for Microsoft Office 29
   The user interface for IBM Cognos for Microsoft Office 29
      IBM Cognos pane 30
      The Properties pane 30
      Customizing IBM Cognos for Microsoft Office 31
      Viewing business cards 31
Table of Contents

Showing cell-based border styles in Microsoft Word 32
Importing report content 32
   Additional supported report objects 33
   Unsupported report objects and formatting properties 34
   Importing scaling formatting 35
   Named ranges in Excel 35
   Importing IBM Cognos PowerPlay reports 36
   Importing dashboard content 38
   Import IBM Cognos report elements into Microsoft Excel 38
   Import IBM Cognos report elements into Microsoft PowerPoint 41
   Import IBM Cognos report elements into Microsoft Word 44
Working with prompted reports 48
   Change prompt values 49
   Remove answers to prompts 50
Working with reports and content 51
   Run a report in PowerPlay Studio, Analysis Studio, or Report Studio 52
   View or run report output versions 53
   Verify or change properties for imported data 54
   Refresh report content 55
   Refresh a folder 56
   Remove a report or data from a Microsoft Office document 57
   Search for reports or report content 58
Save a Microsoft Office document created using IBM Cognos for Microsoft Office 60
Open IBM Cognos Connection from a Microsoft Office application 60

Chapter 5: Try it yourself exercises 61
Microsoft Excel exercises 61
   Import a list report 61
   Create an Excel list to narrow the focus of a report 66
   Import a burst report and hide worksheets for burst recipients 68
Microsoft PowerPoint exercises 72
   Compile reports into a presentation 72

Chapter 6: Best practices and guidelines 77
Using IBM Cognos for Microsoft Office 77
Report design 77
   Recommendation - limit chart metadata 78
   Recommendation - add report objects 78
Report design tips 78
   Recommendation - protect user access to data 79
   Recommendation - publish data with fixed content 79
   Recommendation - avoid nesting objects 79
   Recommendation - maintain table size to a minimum 79
   Recommendation - define image properties 80
Techniques in Microsoft Excel 80
   Recommendation - reference records in large worksheets 80
   Recommendation - refresh data without formatting 80
   Report rendering 81
   Report design tips 82
Techniques in Microsoft PowerPoint 82
Recommendation - use copy and paste commands 82
Recommendation - create PowerPoint-specific tables and charts 83
Techniques in Microsoft Word 83
Recommendation - create tables and charts 83
Recommendation - create text box titles 83
Recommendation - import text as field codes 84

Chapter 7: Automating IBM Cognos Office 85
Example - refreshing data in your Microsoft Office document 85
Set up the Microsoft Office applications for automation 86
Logging automation activities and errors 87
IBM Cognos Office API functions 87
  HttpLogonCredentials 88
  The Logon 89
  ClearAllData 90
  RefreshAllData 90
  UnlinkAllData 90
  Publish 91
  Logoff 92
  TraceLog 92
  SuppressMessages 92
  ClearCache 93
Example - code for processing within VBA 93
Example - code for processing outside VBA 93
Macro files 94
Script files 95

Chapter 8: Troubleshooting 97
Troubleshooting resources 97
  Error messages 97
  Log files 97
  Windows Event Viewer 98
  Samples 98
  Search the Technotes knowledge base 98
  Call Cognos software services 99
Common errors 100
  Configuration Issues 100
  Processing Issues 105
  Security Issues 110
IBM Cognos Office Numbered Error Messages 111
Report Data Service (RDS) Numbered Error Messages 114
IBM Cognos for Microsoft Office Numbered Error Messages 121

Appendix A: Sample reports and packages 125
The Great Outdoors Company Samples 125
The Great Outdoors Group of Companies 126
Employees 128
Sales and Marketing 128
Great Outdoors Database, Models, and Packages 129
Samples in the GO Data Warehouse (analysis) package 131
Introduction

This document is intended for use with IBM® Cognos® for Microsoft® Office. IBM Cognos for Microsoft Office is an add-in for retrieving content from IBM Cognos reporting products, such as IBM Cognos BI 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 BI, IBM Cognos Connection, IBM Cognos PowerPlay Studio, and Microsoft Office software such as Microsoft Excel, Microsoft Word, and Microsoft PowerPoint.

Finding information

To find IBM® Cognos® product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers at http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp. Updates to Release Notes are published directly to Information Centers.

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

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. This product has accessibility features. For information on these features, see the accessibility section in this document.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Samples disclaimer

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

cations. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.
Chapter 1: What's new?

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

For information about upgrading, see the Installation and Configuration Guide for your product.

For information about new IBM® Cognos® BI features for this release, see the IBM Cognos Business Intelligence New Features Guide.

For changes to previous versions, see:

- "New features in version 8.4" (p. 10)
- "New features in version 8.3" (p. 11)

To review an up-to-date list of environments supported by IBM Cognos products, including operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Customer Center Web site www.ibm.com/software/data/cognos/customercenter/

New features in version 10.1.0

Listed below are new features since the last release. 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.

For more information, see "Accessibility features for IBM Cognos for Microsoft Office" (p. 135).

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 BI 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 dashboard content" (p. 38).

**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 business cards" (p. 31).

**New features in version 8.4**

Listed below are features that were new in version 8.4. Links to directly-related topics are included.

**Importing PowerPlay cubes**

You can upgrade Series 7 PowerPlay® cubes to their corresponding PowerPlay cubes in content manager.

If the Series 7 PowerPlay cubes were migrated to IBM Cognos BI, IBM Cognos for Microsoft Office users can import PowerPlay Studio report elements into any of the supported Microsoft Office applications. To import the elements, the document in IBM Cognos for Microsoft Office must accurately reflect the new search path to the content store.

For more information, see "Importing IBM Cognos PowerPlay reports" (p. 36).

**Test connection**

A **Test Connection** button has been added to the **Options** dialog box. Use it to test data connections either as part of your troubleshooting procedures or when you add a new connection.

For more information, see "Add or modify the address for the IBM Cognos BI gateway" (p. 20).

**The Publish method**

The Publish method has been added to the IBM Cognos for Microsoft Office API. Use Publish to publish IBM Cognos for Microsoft Office enabled documents to Cognos Connection.

For more information, see "Publish" (p. 91).
**Display of non-scaled values in Microsoft Excel**

Report values that have had scaling applied in other IBM Cognos BI reporting applications, such as Report Studio, display the actual, non-scaled value in IBM Cognos for Microsoft Office workbooks. For previous versions of IBM Cognos for Microsoft Office, you may need to adjust cell references or calculations to account for this change.

For more information, see "Import IBM Cognos report elements into Microsoft Excel" (p. 38).

**Respecting soft page breaks**

When importing IBM Cognos BI content into Microsoft PowerPoint or Microsoft Word, IBM Cognos for Microsoft Office now respects the page size settings specified in the authored report or query.

A new option labeled **Respect soft page breaks** was added to the **Import Content** wizard to allow the program to automatically separate document pages or slides based on page footers or margins.

For more information see "Import IBM Cognos report elements into Microsoft PowerPoint" (p. 41) and "Import IBM Cognos report elements into Microsoft Word" (p. 44).

**New features in version 8.3**

Listed below are features that were new in version 8.3. Links to directly-related topics are included.

**Improved layout and rendering of report content**

The detailed IBM Cognos BI report definition presents a report in the supported Microsoft Office applications similar to the originally designed report, including information regarding the relative position of objects.

Support is provided for the following report objects:

- conditional blocks
- repeater blocks
- rich text items
- hyperlinks
- repeater tables

IBM Cognos for Microsoft Office can now render more reports similar to Cognos Viewer. For example, the following style information is supported: reading order, horizontal and vertical alignment, and preferred height and width values.

For more information, see "Additional supported report objects" (p. 33).

**Automatic assignment of names to specific report elements**

If no name attribute is defined for a report layout element in any of the studios, a default value is now automatically assigned when the report or query is saved to Content Manager. The value uniquely identifies a report element and uses the same Report Studio naming convention.
Chapter 1: What's new?

A default value is assigned only to the following elements:
- list
- crosstab
- repeater table
- chart elements, such as scatter, pie, polar, and combination

Default values are also assigned to these elements when they are part of a template.

For more information, see "Object names in IBM Cognos Report Studio" (p. 32).

Importing stored and burst report versions

You can now import saved report output versions into Microsoft Excel, Microsoft Word, and Microsoft PowerPoint. This feature is most useful to burst recipients who want to use IBM Cognos for Microsoft Office to import content from IBM Cognos reports into Microsoft Office documents. They can then include business intelligence data in presentations or briefing books and update data in Microsoft Office. Recipients can select a version of a report previously run instead of running the report again. Previously, IBM Cognos for Microsoft Office ran all report content on demand.

Users with execute permission can run a specified saved report output version while those with read permission are allowed to view only the report output. New properties, which can be changed, are associated with report output versions.

A new report property labeled Enable enhanced user features in saved output versions was added to IBM Cognos Connection. Report authors must select this check box to allow IBM Cognos for Microsoft Office users to import saved output versions of a report.

For more information, see "View or run report output versions" (p. 53).

Alternative method for setting prompt values

You can now use the Microsoft Office custom document properties to set prompt values. This is most useful when you want to prompt users for an initial value that is used for the same prompt in multiple reports in a Microsoft Office document.

A new prompt type named Custom Property was added to IBM Cognos for Microsoft Office to indicate the user-defined custom document property. The prompt name that you specify for the Custom Property must match the prompt name in the Microsoft Office Properties dialog box (File, Properties, Custom tab).

For more information, see "Change prompt values " (p. 49).

Searching the content portal for reports and report content

IBM Cognos for Microsoft Office now includes two modes for searching content to find reports for import: enhanced search and name or description searches.

Use the enhanced search to perform full-text searches of content published to IBM Cognos BI. The search examines the full content of the document, and not just the titles. Use the name or description
search to search for reports whose name, description, or both match the string entered in the search criteria.

For more information, see "Search for reports or report content" (p. 58).
Chapter 1: What's new?
Chapter 2: IBM Cognos 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.

IBM Cognos Office integrates the following applications.

<table>
<thead>
<tr>
<th>Applications</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM Cognos for Microsoft Office</td>
<td>Importing IBM Cognos Business Intelligence 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 Business Intelligence 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.</td>
</tr>
<tr>
<td>IBM Cognos Analysis for Microsoft Excel®</td>
<td>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.</td>
</tr>
</tbody>
</table>

The IBM Cognos Office window

Descriptions of the toolbar buttons and key screen elements will help you get started with IBM® Cognos® Office.

The following illustrates the different areas of the IBM Cognos Office window.
IBM 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 Office commands become available as buttons on the toolbar at the top of your Microsoft Office application.

The toolbar (ribbon in a Microsoft Office 2007 environment) provides the following options to help you design reports or perform your exploration.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="IBM Cognos" /></td>
<td>Start IBM Cognos Office by showing the IBM Cognos pane and the IBM Cognos toolbar. Based on the set preferences, the IBM Cognos pane shows either the IBM Cognos Office page or the tools and commands for the default application. Use to also hide the IBM Cognos pane.</td>
</tr>
<tr>
<td><img src="image" alt="Log on/off" /></td>
<td>Log on to a specific IBM Cognos BI system that contains the reports or package information that satisfy your reporting requirements. Logging on requires authentication information, such as user ID and password.</td>
</tr>
<tr>
<td><img src="image" alt="Log off" /></td>
<td>Log off all IBM Cognos Business Intelligence systems. Log off all namespaces.</td>
</tr>
<tr>
<td><img src="image" alt="Set options" /></td>
<td>Set options, such as startup application, system gateway URI, and display limits to customize IBM Cognos Office and applications for the way you work.</td>
</tr>
<tr>
<td><img src="image" alt="Open document" /></td>
<td>Open a saved IBM Cognos Office document from IBM Cognos Connection so that you can work with the report in the Microsoft application used to create it, and then save the report locally.</td>
</tr>
</tbody>
</table>
Publish the saved workbook 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.

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

In exploration mode, each box in the **Rows** and **Columns** drop zones continues to reflect the metadata in the package. You can then publish and distribute the document so that users can open and refresh the data to see an updated version of the exploration.

Refresh data to see the most recent version of the information in the package or data source that a report uses.

Convert data items to static text by disconnecting from the content store. In this format, you can distribute the document to anyone for review.

### IBM Cognos pane icons

The IBM Cognos pane contains icons that help you to switch easily between the various applications and the IBM Cognos Office page.

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>Shows the IBM Cognos Welcome page in the IBM Cognos pane or the pane for the default application that starts for each session.</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>Opens the IBM Cognos for Microsoft Office pane that contains commands related to importing and refreshing pre-authored reports and report content.</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>Opens the IBM Cognos Analysis for Microsoft Excel pane that contains package information required for exploration, analysis, and design of custom reports.</td>
</tr>
</tbody>
</table>

### 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:
Start 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 (p. 19), define the IBM Cognos BI gateway addresses of the data sources, and log on to the IBM Cognos BI servers (p. 23).

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.

Steps

1. On the IBM Cognos Office toolbar, click the IBM Cognos button.
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.

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.
Customizing 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 (p. 19).
- the datasource connection to the database (p. 20).
- the location of IBM Cognos BI gateways (p. 20).
- whether to enable single signon for authentication (p. 21).
- whether to enable forms-based authentication (p. 21).
- whether to enable logging and at what level of detail (p. 22).

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

Customize 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, by default it appears on the right side of your work area and 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.

Steps

1. On the IBM Cognos toolbar, click the Options button.
2. In the left 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 located at the bottom of the IBM Cognos pane.
   - To start a specific application when opening IBM Cognos Office, in the Startup application box, click the application that you want.
4. Click OK.
Specify the data source used to connect to the database

A data source defines the physical connection information necessary for accessing the database that was used to create the models and packages published using Framework Manager, the IBM Cognos BI modeling tool.

Data sources are stored in the Cognos namespace and have unique names. You are not required to enter database authentication information each time the connection is used because the authentication information is encrypted and stored on the server.

IBM Cognos BI supports several types of data sources, such as DB2 or Oracle. You can select the data source to which you want to connect for your analysis.

Steps
1. On the IBM Cognos toolbar, click the Options button.
2. In the left navigation pane, click IBM Cognos.
3. Under IBM Cognos Datasource, in the Datasource box, click the data source to which you want to connect, and then click OK.

Add or modify the address for the IBM Cognos BI gateway

Before you can access IBM Cognos BI content, you must specify the location of the IBM Cognos BI gateway. The IBM Cognos BI application server runs requests, such as reports, analyses, and queries that are forwarded by a gateway. The IBM Cognos BI server then connects to the underlying data sources to obtain data.

You can specify more than one IBM Cognos BI gateway.

If you do not specify a gateway, you cannot open a report from IBM Cognos Connection (p. 27), publish a Microsoft Office document to IBM Cognos Connection (p. 26), or open a package. All these commands require that you specify the IBM Cognos BI server that contains the necessary data source. A message will prompt you to add the gateway location.

Steps to add an address
1. On the IBM Cognos toolbar, click the Options button.
2. In the left navigation pane, click IBM Cognos.
3. Under IBM Cognos Systems, in the System gateway URI box, type the URI that identifies the location of the IBM Cognos BI gateway.
   An example is the following, where server name is either the IP address of the computer or the computer name:
   http://server name/ibmcognos/cgi-bin/cognos.cgi
4. If you want to assign an abbreviated or more meaningful name to the URI, in the Friendly name box, type a name.
   If a name is not specified, the default name is server name:port .
5. Click Add.
The gateway location and friendly name appear in the Systems box.

**Tip:** To delete an existing address, in the Systems box, select the address that you want to delete, and click **Delete**.

6. To ensure that you have added the address properly, click the connection that you want to test, and the click **Test Connection**.

   If you receive the *Connection failed, server is unavailable* message, for help with troubleshooting, see the Configuration Issues in the Troubleshooting section.

7. Click **OK**.

In IBM Cognos for Microsoft Office, the friendly name appears in the IBM Cognos pane as the top or root node in the tree hierarchy.

In IBM Cognos Analysis for Microsoft Excel, the friendly name appears in a list in the Select Package dialog box. After the gateway is chosen, you can select the package or data structure that will provide items for a report.

After specifying the location of the IBM Cognos BI servers, 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.

### Steps to modify an address or friendly name

1. On the IBM Cognos Office toolbar, click the **Options** button.

2. In the left navigation pane, click **IBM Cognos**.

3. In the Systems box, click the URI that you want to change.

4. Choose whether to change the address or the friendly name:

   * To change the address, in the System gateway URI box, make the necessary changes to the URI that identifies the correct location of the IBM Cognos BI gateway.

     An example is the following, where *server name* is the name of the IBM Cognos BI server computer:

     http://server name/ibmcognos/cgi-bin/cognos.cgi

   * To change the friendly name, in the Friendly name box, make the necessary changes.

5. Click **Replace**, and click **OK**.

After specifying the location of the IBM Cognos BI servers, 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.

### Set up user authentication

Your administrator has already configured an authentication provider for IBM Cognos BI components. To enable security between IBM Cognos Office and IBM Cognos client applications, you can enable single signon. Single signon ensures that users who are logged on to one IBM Cognos client application, such as IBM Cognos Planning or IBM Cognos Controller, are not prompted for
authentication when they run another IBM Cognos client application, such as IBM Cognos Analysis for Microsoft Excel.

For single signon to work properly, it must also be established on the IBM Cognos BI servers. The IBM Cognos BI administrator must set a parameter in IBM Cognos Configuration that specifies that a client application can share session information with another client on the same computer. Users can then access reports without subsequent signons because the system automatically identifies users and provides security information.

If your company uses other 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 users to enter their credentials, such as the user name and password, through a form on a Web page. If the credentials are valid, users are logged on to the site. The credentials persist until the user explicitly logs off.

**Steps**

1. On the IBM Cognos Office toolbar, click the Options button.
2. In the left navigation pane, click IBM Cognos.
3. Under IBM Cognos Systems, choose whether to use single signon or forms-based authentication:
   - To enable single signon, select the Enable single signon check box.
     After logging on for the first time, each time that a secure report is accessed, no signon is required because the system automatically provides the security information.
   - To enable forms-based authentication, select the Enable forms based authentication check box.

**Enable logging as a diagnostic tool**

A log file is an important diagnostic tool for investigating the behavior of IBM Cognos Office. It can help you troubleshoot problems by recording the activities that take place when you work with IBM Cognos Office. These activities include information about the environment, exceptions, and entry and exit functions.

You can specify whether information about IBM Cognos Office 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.

**Steps**

1. On the IBM Cognos toolbar, click the Options button.
2. In the left navigation pane, click IBM Cognos.
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.

By default, the log file, Log_yymmdd_hhmmsst.txt, captures the activities and is located in drive:\Documents and Settings\user name\Local Settings\Application Data\Cognos\Office Connection\Logs.

The next time that you start IBM Cognos Office, activities and information about the environment are logged in the file.

Log on to an IBM Cognos Business Intelligence server

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

The procedures for logging on may vary depending on your credential system. You may have several logon screens that require credentials, such as user ID and password, or no logon screens are shown. Anonymous users do not log on.

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

Steps

1. On the IBM Cognos toolbar, click the Logon button, and select the server that contains the data source or package for the desired reports.

2. If there is more than one namespace, in the Namespace box, click the desired namespace and click OK.

3. Type your User ID and Password, and click OK.

4. Repeat steps 1 to 3 for each additional server.

After logging on and showing the IBM Cognos pane, you can use IBM Cognos Office.

Clear Cache

For each workbook that you open or create during or after logging on to IBM Cognos Office or its components, a cache worksheet is created. This worksheet holds information about the data that needs to be rendered. You can clear the cache of packages used in workbooks that use IBM Cognos Analysis for Microsoft Excel. Clearing the package cache reduces the size of the workbooks by deleting unused data and metadata associated with exploration and formulas. The Clear Cache
button works for all the data sources and packages defined in IBM Cognos Analysis for Microsoft Excel. After you clear the cache, you must save workbooks to see a reduction in file size.

Clear the cache when workbook size matters. If the size of your workbook is too large due to extensive data, the clear cache function reduces the size of the workbook. However, there is a trade-off: the processing time for populating the workbook with data increases because the data must be retrieved from the IBM Cognos BI data server instead of relying on the data that is saved in the cache.

Alternatively, you can specify to clear the local cache of retrieved data each time that you save the workbook or save the workbook with a new file name. You can do this by selecting the Clear Cache on save check box.

**Steps**

1. Start IBM Cognos Analysis for Microsoft Excel.
2. Open a workbook.
3. From the IBM Cognos toolbar, click Options.
4. Under Cache Management, choose how you want to clear cache:
   - To clear the local cache for the active workbook, click Clear Cache.
     
     The cache is cleared and the size of the workbook is reduced. You can now open and save additional workbooks. To avoid creating a cache worksheet for non-IBM Cognos workbooks, you must exit Microsoft Excel.
   
   - To clear the local cache each time you save a workbook, or save a workbook with a new file name, select the Clear Cache on save check box.
     
     Data displayed on the workbook is cleared only when using the Clear All Data button from the IBM Cognos toolbar.
5. Click OK, and then save the workbook.

You can also automate the process for clearing the cache. For more information, see "ClearCache" (p. 93).
Chapter 3: 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® Business Intelligence 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 (p. 25)
- clear cells of contents (p. 25)
- convert dynamic data to static data (p. 26)

Refreshing data

If the package or source data that a report is using changes, you can refresh it to ensure that you are working with the latest version.

In Microsoft® Excel, all worksheets in the workbook are updated with the most recent data. These include any imported reports or explorations, 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.

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

In IBM Cognos for Microsoft Office, the results of the Refresh command differ based on whether you are running a report or viewing a report output version.

For more information, see "View or run report output versions" (p. 53).

Any modifications made to an exploration, such as adding or removing columns and rows, formatting, and manipulating data, are lost. Changes to cell-based analysis remain in effect. Any report or exploration whose data was converted to static text or numeric data remains unchanged.

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.

Clearing the contents does not break the link to the data sources.

You can continue with your exploration 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" (p. 57).

**Converting dynamic data to static data**

If you modify a report, an analysis, or an exploration 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.

**Publish 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 Business Intelligence.

You can also automate this task by using the Publish method. For more information, see "Publish" (p. 91).

If IBM Cognos BI 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.

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.

**Steps**

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 BI 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**.

The active document is published to IBM Cognos Connection.

---

**Opening, saving, and downloading existing Microsoft documents**

You may have existing workbooks or presentations that you want to update with IBM® Cognos® Business Intelligence 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 BI gateway appears in the list of addresses under **IBM Cognos Systems**, if one was not already defined in custom properties.

**Open and save a report locally from IBM Cognos Connection**

You can store the reports that you create or modify on the IBM Cognos BI 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 (p. 28).

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

**Steps**

1. On the IBM Cognos Office toolbar, click the **Open** button.

2. In the **Look in** box, select the IBM Cognos BI server that contains the report that you want.

3. Choose the type of folder in which the report is saved:
Chapter 3: Working with Microsoft Office documents

- 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**.

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 (p. 26).

**Download 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 BI **Administration and Security Guide**.

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

**Steps**

1. In IBM Cognos Connection, locate the document that you want to open.

2. Click **more** on the actions toolbar to the right of 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.

   You can now perform the same actions that you would perform for any Microsoft Office document of the selected type.
Chapter 4: IBM Cognos for Microsoft Office

Use IBM® Cognos® for Microsoft® Office to access IBM Cognos business intelligence content in Microsoft Excel where you can work with existing IBM Cognos BI reports, apply calculations, and use your existing Excel macros. You can also import content into Microsoft PowerPoint and Microsoft Word. You can use IBM Cognos business intelligence 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 (p. 32).
- Modify IBM Cognos business intelligence content using familiar interfaces (p. 48).
- Refresh the Microsoft Office documents with updated information on demand for strategic planning, forecasting, and business reporting (p. 55).
- Publish and share IBM Cognos-enabled files to the secure IBM Cognos BI portal (p. 26).

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 BI 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 the Installation Guide.

The user interface for IBM Cognos for Microsoft Office

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

The IBM Cognos 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 BI 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 business cards" (p. 31).

- **the Manage Data tab**
  
  Contains reports or report elements that were imported from the IBM Cognos BI servers, such as crosstabs, lists, or charts, and their associated properties.

- **the Properties pane on the Manage Data tab**
  
  Lists the properties that you can view or set for a report or an object in a report.

The Properties pane

The Properties pane provides 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 BI 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" (p. 53).

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 business cards

IBM Cognos for Microsoft Office provides business cards to show thumbnails and high-level information about the reports or report items, such as owner, contact, the date the report was last modified, location, and description.

When you enable the business card feature, the business 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 business 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 BI 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.

Steps

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 to show or hide business cards:
   • To show business cards so that you can preview items in the source tree or the Import Content wizard, select the Show Business Cards check box.
   • To hide the business cards, clear the Show Business Cards check box.
4. Click OK.

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 top, left cell of the report 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.

Steps
1. On the IBM Cognos toolbar, click the Options button.
2. In the left 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.

Importing report content

You can import report content into the following Microsoft® Office applications: Excel (p. 38), PowerPoint (p. 41), and Word (p. 44).

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® BI elements such as crosstabs, graphs, charts, and tables. 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.

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" (p. 44).

Multilingual reports and content language
IBM Cognos BI 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 BI, 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
The following additional objects are imported when they are part of the IBM Cognos report layout.

<table>
<thead>
<tr>
<th>Object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditional blocks</td>
<td>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.</td>
</tr>
<tr>
<td>Repeater blocks</td>
<td>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.</td>
</tr>
</tbody>
</table>
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. These items cannot contain HTML code that may be used to change the text formatting.

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 " (p. 32).

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 (p. 35).
- 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.

**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.

**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, Budget vs. Actual, the following default named ranges have been assigned:

<table>
<thead>
<tr>
<th>Named range</th>
<th>Group of cells</th>
</tr>
</thead>
<tbody>
<tr>
<td>BudgetvsActual_Crosstab1_Crosstab1</td>
<td>The entire crosstab</td>
</tr>
<tr>
<td>BudgetvsActual_Crosstab1_Crosstab1_Columns</td>
<td>All column header cells in the crosstab.</td>
</tr>
</tbody>
</table>
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 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 BI, 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 BI 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 BI, 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.

### Change the 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.

**Steps to view the search path for PowerPlay reports in IBM Cognos Connection**

1. Open IBM Cognos Connection.

2. Locate the entry for the PowerPlay report for which you want to 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.

**Steps to add the new search path to migrated PowerPlay reports in IBM Cognos for Microsoft Office**

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 "Download a Microsoft Office document from IBM Cognos Connection" (p. 28).

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 "Publish a Microsoft Office document to IBM Cognos Connection" (p. 26).
Importing dashboard content

You can import dashboards that were created and assembled using IBM Cognos Business Insight into any of the supported Microsoft applications. Dashboards can include the following objects:

- composite reports
- report parts such as lists, crosstabs, and charts
- metric lists and individual metrics

All report parts, such as lists, crosstabs, and charts, that are supported for import from Report Studio or Analysis Studio are also supported for import from the dashboards (p. 33). Composite reports in a dashboard are imported as a discrete element. That is, only the composite report and not the individual report parts that make up the report is available for selection in the Import Content wizard or on the tab pages of the IBM Cognos pane. However, when you import the composite report, the individual report parts appear as separate elements in the Microsoft Office document, worksheet, or slide.

For example, suppose the pre-assembled dashboard that you want to import includes the following report objects:

- an image
- a composite 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 composite report, and the list report into Excel, the worksheet will render the image, the composite report and all the report objects, including the two charts and crosstab, and the list report. These elements may not display in the same order in which they were assembled on the dashboard. That is because the dashboard is made of multiple reports and report objects that may be returned by the server in a different order than requested.

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.

A composite report assembled in IBM Cognos Business Insight is available for import as a single report element. However, all of its report parts appear as separate elements on the worksheet after it is imported into Microsoft Excel.

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 "Refresh report content" (p. 55).
**Note:** 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.

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.

For more information about best practices for working with Microsoft Excel, see "Techniques in Microsoft Excel" (p. 80).

**Steps**

1. In IBM Cognos for Microsoft Office, click the **Browse Content** tab.

2. Expand the list of reports from the top node and click the report to import into the workbook.

3. Click **Import Content**.
   
   If this report was imported into this workbook already, a unique name for this instance of the report is assigned.

4. If you want to change the default name, in the **Name** box, type a different name, using no more than 215 characters.

5. 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.
     
     If the element is a composite report imported from a dashboard assembled in IBM Cognos Business Insight, no breaks are applied to the report pages within the composite report.

   - 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.
     
     If the element is a composite report imported from a dashboard assembled in IBM Cognos Business Insight, no new worksheets are created for the report pages within the composite report.

6. 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 run a report. You must have read and traverse permissions for the folder that contains the report. If you have only read permission, you can view only 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 only need read permission to view a report output version.

7. If you selected **Select a specific output version**, on the **Select Report Properties** page, click the burst key, or language version, 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.

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" (p. 48).

  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**.

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

9. 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.

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

    For dashboard composite reports, the report is imported as a single element. If the element was imported to this workbook already, a unique named range for this instance of the element is assigned. If you choose, you can assign a named range, using no more than 215 characters.

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

    For dashboard composite reports, all report objects within the report are rendered individually in the specified worksheet location.

    **Tip**: Click the button to the right of the **Location** box 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.

12. Select the workbook options that you want.

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide Labels</td>
<td>Hides or shows labels for row or column metadata.</td>
</tr>
<tr>
<td>Repeat Labels</td>
<td>Repeats labels for row or column metadata.</td>
</tr>
<tr>
<td>Group</td>
<td>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.</td>
</tr>
<tr>
<td>Import as an Excel List</td>
<td>Shows items as a list, which enables list controls at the top of each column. This feature is not supported in Microsoft Excel XP.</td>
</tr>
<tr>
<td>Ignore Formatting</td>
<td>For list report elements, imports numeric data without formatting or masks.</td>
</tr>
<tr>
<td>Automatically resize columns</td>
<td>Adjusts the column size to fit the contents.</td>
</tr>
</tbody>
</table>

13. Click **Next**.

14. For each report element, repeat steps 10 to 13.

   **Tip:** 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" (p. 48).

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 a variety of IBM Cognos BI 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.

A composite report assembled in IBM Cognos Business Insight is available for import as a single report element. However, all of its report parts appear as separate elements on the worksheet after it is imported into Microsoft PowerPoint.

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.

We recommend that you 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 " (p. 82).

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.

**Steps**

1. In IBM Cognos for Microsoft Office, click the Browse Content tab.

2. Expand the list of reports from the top node and click the report that you want to import into the presentation.

3. 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.

4. To change the default name, in the Name box, type a name using no more than 215 characters, and click Next.

5. 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.

     This setting does not apply to report pages within a composite report imported from a dashboard assembled in IBM Cognos Business Insight.

   • 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 bottom of the slide, 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.

6. 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 run a report. You must have read and traverse permissions for the folder that contains the report. If you have only read permission, you can only view 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 permission to view a report output version.

7. If you selected **Select a specific output version**, on the **Select Version Parameters** page, click the burst key or language version 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 will only see data that is meant for you.

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" (p. 48).

  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**.

  **Tip:** To jump to a particular page in the wizard, click the element or options page listed in the left 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.

    Dashboard composite reports are imported as a single element.

    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.

    **Tip:** Click the **New Slide** button to the right of the **Location** box 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.

- **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.

13. If the object is a composite report imported from IBM Cognos Business Insight, 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.

   **Tip**: 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 "Working with prompted reports" (p. 48).

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.

A composite report assembled in IBM Cognos Business Insight is available for import as a single report element. However, all of its report parts appear as separate elements on the document after it is imported into Microsoft Word. Select report elements that can be sized to fit on a page.

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" (p. 83).

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.

**Steps**

1. In IBM Cognos for Microsoft Office, click the **Browse Content** tab.

2. Expand the list of reports from the top node and click the report that you want to import into the document.

3. Click **Import Content**.
   
   If this report was already imported into this document, a unique name for this instance of the report is assigned.

4. If you want to change the default name, in the **Name** box, type a name using no more than 215 characters.

5. If the report element is a dashboard composite report from IBM Cognos Business Insight, 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.

6. 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 the element is a composite report imported from a dashboard assembled in IBM Cognos Business Insight, no page breaks are applied to the report pages in the composite report.
• 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 bottom margin, 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.

7. **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 run a report. You must have read and traverse permissions for the folder that contains the report. If you have only read permission, you can view only 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 permission to view a report output version.

8. If you selected **Select a specific output version**, on the **Select Version Parameters** page, click the burst key or language version 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 will only see 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" (p. 48).

     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.

     **Tip**: To jump to a particular page in the wizard, click the element or options page listed in the left 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" (p. 83).

  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.
  
  **Tip:** 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" (p. 48).

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

---

### Working with prompted reports

Prompts act as questions that help users customize the information in a report. 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. The prompts appear after an import is complete if the report has unanswered prompts. If you set and saved default answers for the prompts, IBM Cognos for Microsoft Office uses those answers.

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.

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 satisfy parameter values before running a report. 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.

You can work with prompts in IBM Cognos for Microsoft Office by changing prompt values (p. 49) or removing prompt values (p. 50).
Change prompt values

After you set prompts the first time in the IBM Cognos Viewer window and you import the report into a Microsoft Office document, you can change prompt answers or set answers for prompts. The default setting is Specified Value. If you change the server from which you are reading reports, 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.

Specified Value

Sets the answer to the prompt. Users must provide a prompt value, which appears in the Use Value box. The value is saved for future renditions of the Office document.

Applies to Excel, Word, and PowerPoint.

Always Prompt

Requires the user to be prompted. No 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 answer 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 name must match the name that is entered in the Microsoft Office custom document property, and is saved for future renditions of the Office document.

The prompt answer 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.

Applies to Excel, Word, and PowerPoint.

Steps

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

   The list of parameters appears.

2. Expand each of the parameters.

3. Choose one of the prompt options:

   • 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 imported into the Microsoft Office document, 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, in the **Type** box, click **Custom Property**, and then, in the **Custom Property** box, type the name of the custom document property.

From the **File** menu, click **Properties**, and then click the **Custom** tab. In the **Name** box, type a name for the custom document property. The name you type must match the name in the **Custom Property** box in the **Properties** pane.

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.

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.

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

**Tip:** You can use 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.

In some cases, the display value for the prompt is not the same as the use value. The use value is the value in the data source and must be used for any cell references created in Excel.

### Remove 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 any defaults.

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 where other users can access it using their own security privileges.

**Steps**

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

## Working with reports and content

IBM® Cognos® for Microsoft® Office is fully integrated with IBM Cognos Business Intelligence 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 BI 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 BI 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 both read 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.

To work effectively with reports and report content, you can do the following in your preferred Microsoft application:

- Run reports in IBM Cognos PowerPlay Studio, IBM Cognos Analysis Studio, and IBM Cognos Report Studio (p. 52).
- View report output versions (p. 53).
- View source and version information (p. 54).
- Search for reports or content (p. 58).

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 BI, 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.

Steps

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.

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 "Refresh report content" (p. 55).

**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.

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 about report output versions, see "Report output versions" (p. 51).

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

**Steps**

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.
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. This helps you ensure that you are working with the latest version of the right data.

### Report properties

You can verify or change values for the these Report properties.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the imported report. If a report with the same name already exists in the document, you can change the name to distinguish it from other reports.</td>
</tr>
<tr>
<td>Last Refreshed</td>
<td>The date and time when the report was last updated with the most recent content changes.</td>
</tr>
<tr>
<td>System</td>
<td>The URI that is the address to the IBM Cognos BI gateway.</td>
</tr>
<tr>
<td>Search Path</td>
<td>The search path that shows the fully qualified location of the report in the IBM Cognos BI content store.</td>
</tr>
<tr>
<td>Version</td>
<td>The property values related to the report output versions available on the IBM Cognos BI server. If set to Run, the report is as current as 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 may be older than what is currently available in the content store. For more information, see &quot;Working with reports and content&quot; (p. 51).</td>
</tr>
<tr>
<td>Burst Key</td>
<td>The dimension or level of a query in the report specification that is used to create, or burst, a set of report results.</td>
</tr>
</tbody>
</table>

### Report element properties

Verify or change values for the report element properties.
<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the imported report element.</td>
</tr>
<tr>
<td>Element ID</td>
<td>The unique identifier for the imported report element to be reused, usually</td>
</tr>
<tr>
<td></td>
<td>to take advantage of any applied formatting.</td>
</tr>
<tr>
<td>Last Refreshed</td>
<td>Date and time when the report element was last retrieved from the content</td>
</tr>
<tr>
<td></td>
<td>store.</td>
</tr>
</tbody>
</table>

**Steps**

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 or change the property values.

   If the report content is a cube, a list of dimensions and the measure is also provided.

After you verify the settings or make your changes, you may choose to refresh the content. For more information, see "Refresh report content" (p. 55).

**Refresh report content**

You can refresh the content of reports, including report output versions or scheduled reports, to retrieve the latest updates and changes.

The **Refresh Data** function runs the report or report component, updates the data, and includes any changes to the report hierarchy. Any formatting applied from the Microsoft Office application remains unchanged. In Microsoft Excel, refreshed data may exceed the target range in the workbook, overwriting existing cell contents or named ranges. If this happens, you must move existing named ranges to create an acceptable row or column range for the updated report data.

The **Refresh Data and Formatting** function refreshes data and formatting, such as cell color and number formatting. If you have customized cell formats, the function changes the special formatting to the current report formatting.

**Microsoft Excel**

The query used to refresh data is for the entire report element that you select. Refreshing data may impact the report layout in Microsoft Excel. If you try to insert rows or columns within this imported object, they are overwritten when you refresh the data. If your data or data structure, such as the number of rows and columns, changes on a subsequent refresh, the object resizes, but other elements in the workbook may be overwritten.
Microsoft PowerPoint
The following formatting is preserved when you refresh IBM Cognos data:

- any custom formatting applied in the PowerPoint presentation, such as borders, positioning, and resizing
- any custom formatting applied in the PowerPoint presentation, such as the cell fill, cell borders, font size, and font style

The following formatting is updated when you refresh data:

- formatting applied to a chart in the report, such as the palette or legend
- columns or rows added in PowerPoint are overwritten
- columns or rows deleted in PowerPoint reappear

If the Refresh Data and Formatting option is applied, all custom formatting within a PowerPoint presentation is lost.

Prerequisites
For a specific report output version, set the report property Version on the Manage Data tab to Run to update the report content with the most recent data. For a burst report, the burst key set during the import dictates which version of the report is updated.

Tip: To change the burst key, select the new key from the Burst Key property on the Manage Data tab.

Step for all imported reports in the Microsoft Office document
- On the IBM Cognos toolbar, click the refresh all data button.

All the reports in the workbook, document, or presentation are updated. If you are a burst recipient, you see only data that is meant for you.

Steps for a specific report, report element, or component
1. In IBM Cognos for Microsoft Office, click the Manage Data tab.
2. Right-click a report element or component.
3. Choose whether to refresh data or refresh data and formatting:
   - To refresh data with formatting, click Refresh Data and Formatting.
   - To refresh only data, click Refresh Data.

The selected report content is refreshed. If you are a burst recipient, you see only data that is meant for you.

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.

**Steps**
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.

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.

**Steps**
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.

<table>
<thead>
<tr>
<th>Remove option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove Element or Remove Report</td>
<td>Breaks the link between the data in the document and the report on which that data is based</td>
</tr>
<tr>
<td>Remove Data</td>
<td>Clears the data from the document while maintaining a connection to the data source</td>
</tr>
<tr>
<td>Remove Element and Data or Remove Report and Data</td>
<td>Completely deletes the report and data from the document</td>
</tr>
</tbody>
</table>
Search 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 Business Insight components in the existing IBM Cognos BI 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 BI. 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 BI 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>
<thead>
<tr>
<th>Method</th>
<th>Search criteria</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains the exact string</td>
<td>Revenue A</td>
<td>&quot;Revenue A&quot;, &quot;Revenue ABC&quot;,&quot;Copy of Revenue A&quot;</td>
</tr>
<tr>
<td>Starts with the exact string</td>
<td>revenue</td>
<td>&quot;revenue A&quot;, &quot;Revenue ABC&quot;</td>
</tr>
<tr>
<td>Matches the exact string</td>
<td>Revenue</td>
<td>&quot;Revenue&quot;, &quot;revenue&quot;</td>
</tr>
</tbody>
</table>

Steps based on full text

1. In the IBM Cognos pane, click Search.

2. In the Server box, click the IBM Cognos BI 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.

5. If you want to refine the search content, do the following:
   - Click the left arrow in the Result pane.
     The Refine By tree shows additional details about the source locations of the search results.
     - Select items from the Refine By tree.
       If you select more than one item, you can choose to show results that include all selections, or any of the selections.
     - Use the advanced options to limit the search to a specific entry type.
       If you select more than one item, you can show results that include all selections, or any of the selections.

**Steps based on names or descriptions**
1. In the IBM Cognos pane, click Search.
2. In the Server box, click the IBM Cognos BI 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.
The reports that match the criteria and that you have permissions to view, appear in the Result pane.
Save a Microsoft Office 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.

**Steps**

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 BI and provides a single access point to all corporate data available in IBM Cognos BI. 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.

**Steps**

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**.

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 5: 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 BI content into Microsoft Excel, including complex business, production, managed, and dashboard reports. You can also import individual elements such as crosstabs, graphs, charts, and tables and multiple heterogeneous queries with contextual information.

As users update BI 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.

Steps to import IBM Cognos content

1. Select the Browse Content tab.
2. Import the Sales Growth Year Over Year report from Go Data Warehouse (analysis), Report Studio Report Samples.
Chapter 5: Try it yourself exercises

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 so that the worksheet appears as follows:

![Excel worksheet with custom number format applied to the Revenue column](image)

### Steps to refresh data and formatting

1. Change the revenue for **Camping Equipment** to $600,382,422.83.
2. Click the refresh all data button.

Clicking the refresh all data button retrieves the most up-to-date data from the content store and updates the worksheet. Note that the changes in Revenue are overwritten by the data in the content store. Excel formatting changes are preserved.
3. From the Manage Data tab, right-click the report and click Refresh Data and 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.

**Steps to remove data and refresh the report**

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.

For more information, see

- "Import IBM Cognos report elements into Microsoft Excel" (p. 38)
- "Refresh report content" (p. 55)
- "Remove a report or data from a Microsoft Office document" (p. 57)

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 at the top of the list in the header row. The blue border 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 BI 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, and your report will appear as follows:
Steps

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.

For more information, see
- For help on the List command, see the Microsoft Excel online help.
- For help on the Conditional Formatting command, see the Microsoft Excel online help. "Import IBM Cognos report elements into Microsoft Excel" (p. 38)

**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 BI 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.

**Steps**

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, and the report appears as follows:
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.

For more information, see

- **Import IBM Cognos report elements into Microsoft Excel**
- For help on hiding worksheets and protecting workbooks, see the Excel online help
- For help on protecting the visual basic code or macros, see 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 five slides for a PowerPoint presentation that highlights sales revenue for the Great Outdoors Company.

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

Steps to create slide 1

1. 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 BI 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.

   Your slide should appear as follows:
Steps to create slide 2

1. Select the **Browse Content** tab.

2. Import the **2005 Sales Summary** report from **Go Sales (analysis), GO Office Report Samples**.

3. When importing the report, create new slides for report pages and insert this slide after slide 1.

4. Clear all headers and footers, and select to import only the **Combination Chart11111**.

5. At the top of the slide, type the following title:
   
   **Revenue by Product Line**

6. Add a footer to all slides that includes the slide number.
   
   Ensure that the title slide (slide 1) does not include a slide number.

Your slide appears as follows:
Steps to create slide 3

1. Select the Browse Content tab.

2. Import the 2005 Sales Summary report from Go Sales (analysis), GO Office Report Samples.

3. When importing the report, create new slides for report pages and insert this slide after slide 2.

4. Clear all headers and footers, and select only the List 1111 and List 2111 elements.

5. At the top of the slide, type the following title:
   Top Sales Staff

6. Move the top sales staff table to the left side of the slide and the top 10 sales staff table to the right of the slide.

7. In a text box above the top sales staff table, type Top Sales Staff by Quantity Sold.

8. In a text box above the top 10 sales staff table, type Top 10 Sales Staff (% Over Target).

Your slide appears as follows:
Steps to create slide 4

1. Select the Browse Content tab.

2. Import the 2005 Sales Summary report from GO Sales (analysis), GO Office Report Samples.

3. When importing the report, create new slides for report pages and insert this slide after slide 3.

4. Clear all headers and footers, and select only the Combination Chart 211 and Combination Chart 311, Combination Chart 411, and Combination Chart 21 elements.

5. In the title box, type Revenue by Territory.

Move the charts so that your slide appears as follows:
Chapter 5: Try it yourself exercises

Revenue by Territory

![Revenue by Territory chart](chart.png)
Chapter 6: 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 BI 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 BI 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 BI 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 "Automating IBM Cognos Office" (p. 85).

Report design

When importing IBM® Cognos® BI 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 BI.

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 BI 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 BI 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** command 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 is 25 rows by 25 columns. Although you can add rows, the expanded table may not appear 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 BI 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® BI 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.

80 IBM Cognos for Microsoft® Office
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.

**Report rendering**

You should be aware of some of the unique limitations of Microsoft Excel that affect the rendering of pre-authored IBM Cognos BI 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 BI, 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 BI 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 BI 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, tables are limited to 25 rows and 25 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 in to the table.

Edit tables in IBM Cognos BI 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" (p. 79).

For more information about avoiding nested objects, see "Recommendation - avoid nesting objects" (p. 79)

**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 7: 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.

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

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

- Refresh the IBM Cognos Office data (p. 85).
- Import the CognosOfficeAutomationExample.bas file (p. 86).
- Use the IBM Cognos Office API functions (p. 87).
- Refer to the IBM Cognos Office Visual Basic (VBA and VBS) sample script files to enhance your solution (p. 95).

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 Business Intelligence Web server, ibmcognos/cgi-bin/cognos.cgi, to refresh the data contained in your Microsoft Office document.

```vba
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/cgi-bin/cognos.cgi"
' 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 Sub
```

After logging on, you can refresh your data. For more information, see "RefreshAllData" (p. 90).

### Set up the Microsoft Office applications for automation

The quickest way to set up Microsoft® Excel, Microsoft Word, or Microsoft PowerPoint for automation is to import the CognosOfficeAutomationExample.bas file into the Microsoft Excel workbook, the Microsoft PowerPoint presentation, or the Microsoft Word document. It contains 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.
To use the IBM Cognos Office AutomationExample.bas file, you must import the CognosOfficeMessageSuppressor.cls file. The .cls file contains the SuppressMessages function that allows you to disable the standard alerts and messages.

**Steps**

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. Click the CognosOfficeAutomationExample.bas file and import it into the VBA project. Do not edit this code module.
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 and close as a template, and then reopen the template.

You can now call the macros contained in the CognosOfficeAutomationExample.bas file 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 " (p. 92).

**IBM Cognos Office API functions**

After the reference to IBM® Cognos® Office Automation is established, any macro in VBA can call the functions exposed in the IBM Cognos Office Automation API.

Use API functions to process Microsoft® Office documents, such as workbooks, documents, and presentations. If Microsoft Office is open when a command is executing, the command executes in interactive mode. If Microsoft Office is closed when the command is executing, the command executes in batch mode. Executing in batch mode means that all display alerts are turned off.

The functions that are exposed through the IBM Cognos Office automation objects are
HttpLogonCredentials, which authenticates a user to a Web site that requires new authentication credentials (p. 88).

- Logon, which authenticates users to the IBM Cognos Business Intelligence Web server (p. 89).
- ClearAllData, which clears all the IBM Cognos Business Intelligence data values in the document, workbook, or presentation (p. 90).
- RefreshAllData, which refreshes all the current IBM Cognos Business Intelligence data values that are in the document, workbook, or presentation (p. 90).
- UnlinkAllData, which converts the linked IBM Cognos Business Intelligence data values into static values that are no longer updated when functions such as RefreshAllData are called (p. 90).
- Publish, which publishes IBM Cognos Office documents to IBM Cognos Connection (p. 91).
- LogOff, which logs off all the IBM Cognos Web servers that are currently logged on (p. 92).
- TraceLog, which returns all the automation activities and errors (p. 92).
- SuppressMessages, which suppresses the alerts and messages shown during normal operations of IBM Cognos Office (p. 92).
- ClearCache, which reduces the size of an IBM Cognos Analysis for Microsoft Excel workbook by deleting metadata and data from the workbook (p. 93).

To learn about the properties and methods of an object, consult the online help for more information. Because the object is obtained at run time and there is no type library installed on the client's machine, the user cannot use IntelliSense to determine what properties and methods are available on the object.

**HttpLogonCredentials**

The HttpLogonCredentials 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.

IBM Cognos Office does not support SiteMinder form-based authentication. You must use the IBM Cognos Office menu commands and options instead of the API to automate the refreshing and publishing of workbook, document, and presentation content.

**Syntax**

HttpLogonCredentials *(url, user name, password)*

<table>
<thead>
<tr>
<th>Argument</th>
<th>Description</th>
<th>Data type</th>
</tr>
</thead>
<tbody>
<tr>
<td>url</td>
<td>The URL for the Web site against which you want to authenticate</td>
<td>String</td>
</tr>
<tr>
<td>user name</td>
<td>The user name for authentication</td>
<td>String</td>
</tr>
</tbody>
</table>
The Logon

The Logon takes the URL of the IBM Cognos Business Intelligence Web 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.

The IBM Cognos Office API supports the IBM Cognos Office strategy of storing 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 IDs, passwords, and namespaces.

Logon does not appear in the macro list (Tools menu, Macro, Macros, or ALT+F8) in any of the Office applications because it receives an argument. Any macro with parameters is by definition private and private macros are not shown in the macro options by default.

Syntax

Logon (url, user name, password, namespace)

<table>
<thead>
<tr>
<th>Argument</th>
<th>Description</th>
<th>Data type</th>
</tr>
</thead>
<tbody>
<tr>
<td>url</td>
<td>The URL for the IBM Cognos Web server to which you want to log on</td>
<td>String</td>
</tr>
<tr>
<td>user name</td>
<td>The user name for authentication</td>
<td>String</td>
</tr>
<tr>
<td>password</td>
<td>The password for authentication</td>
<td>String</td>
</tr>
<tr>
<td>namespace</td>
<td>The specific namespace for authentication</td>
<td>String</td>
</tr>
<tr>
<td>Return</td>
<td>The Boolean value that is true if successful</td>
<td>Boolean</td>
</tr>
</tbody>
</table>

Example

Here is an example of this syntax:

Dim bResult As Boolean
Chapter 7: Automating IBM Cognos Office

**ClearAllData**

ClearAll Data clears all the IBM Cognos data values in the current Microsoft Office document, workbook or presentation.

**Syntax**

ClearAllData()

**Example**

The following is an example of this syntax:

CognosOfficeAutomationObject.ClearAllData

**RefreshAllData**

RefreshAllData fetches the most current data values from the IBM Cognos Web server and updates those values in the current Microsoft Office document, workbook, or presentation.

The system must be successfully logged on to the IBM Cognos Web server.

**Syntax**

RefreshAllData()

**Example**

The following is an example of this syntax:

```vba
Dim bResult as Boolean
'Refresh the data if we successfully logged on to the IBM Cognos server.
If bResult Then
    CognosOfficeAutomationObject.RefreshAllData
End If
```

**UnlinkAllData**

UnlinkAllData disconnects all the IBM Cognos data values in the current Microsoft Office document, workbook, or presentation. These values are no longer updated with subsequent calls to RefreshAllData. They become static values.

Any IBM Cognos data values that are imported into the current Microsoft Office document, workbook, or presentation after UnlinkAllData is called will continue to be linked to the IBM Cognos data source on the Web server. They are updated with new server data using the RefreshAllData call.

**Syntax**

UnlinkAllData()
Example
The following is an example of the syntax:
CognosOfficeAutomationObject.UnlinkAllData

Publish

Use Publish to publish IBM CognosOffice documents to IBM Cognos Connection.
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 (Tools menu, Macro, Macros, or ALT+F8) in any of the Office applications because it receives an argument. Any macro with parameters is by definition private and private macros are not shown in the macro options by default.

Syntax
IResult Publish (URL, document path, server path, name, description, screenTip)

<table>
<thead>
<tr>
<th>Argument</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>Indicates the server to which you are publishing. Data type: string</td>
</tr>
<tr>
<td>document path</td>
<td>Indicates the location of the Office document to be published. It is the local path of the file that you want to publish. The folder path is a search path in IBM Cognos Business Intelligence. For more information, see the IBM Cognos BI User Guide. If the path of your folder is not correct when you publish using IBM Cognos Office 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. Data type: string</td>
</tr>
<tr>
<td>server path</td>
<td>Indicates the path in the content store where the document is saved. Data type: string</td>
</tr>
<tr>
<td>name</td>
<td>Indicates the name of the document as it appears in IBM Cognos BI. Data type: string</td>
</tr>
<tr>
<td>description</td>
<td>Describes the Office document as it should appear in IBM Cognos BI. Data type: string</td>
</tr>
</tbody>
</table>
### Argument

**screenTip**

Fills the screen tip text that users see when they point to the Office document in the list of published items in IBM Cognos BI.

Data type: string

Following is an example of this syntax:

```vbnet
Dim resultObject As Object
Set resultObject = Publish("CAMID('::Anonymous')/folder[@name='My Folders']", "Description of 'My Folders'", ","")
```

### Logoff

Logoff logs off all the IBM Cognos Web servers to which users are currently logged on.

**Syntax**

Logoff()

**Example**

The following is an example of the syntax:

```vbnet
CognosOfficeAutomationObject.Logoff
```

### TraceLog

TraceLog returns all the IBM Cognos Office automation activities and errors.

**Syntax**

String TraceLog()

**Example**

The following is an example of the syntax:

```vbnet
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 Office.

**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, which can only be used with IBM Cognos Analysis for Microsoft Excel® workbooks, reduces the size of a workbook by clearing metadata and data from explorations and formulas.

**Syntax**

ClearCache()

**Example**

The following is an example of the syntax:

CognosOfficeAutomationObject.ClearCache()

**Example - code for processing within VBA**

The following example demonstrates how to call the Logon method within VBA:

```vba
Dim bResult as Boolean
bResult = CognosOfficeAutomationObject.Logon
("http://localhost/ibmcognos/cgi-bin/cognos.cgi","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 Office, refreshes the content, and logs off.
Chapter 7: Automating IBM Cognos Office

' 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/cgi-bin/congnos.cgi", "Administrator", ",", "Production"
objExcel.Run "RefreshAllData"
objExcel.Run "Logoff"
objExcel.Run "WriteTraceLog", "C:\AutomationLog.log"
objWorkbook.Save
objWorkbook.Close
objExcel.Quit

Macro files

The macro files are written in Visual Basic for Applications (VBA). They are installed with IBM® Cognos® Office in the Automation folder. The default location is client_installation_directory\Automation.

Microsoft® Excel and Microsoft Word share the same CognosOfficeAutomationExample.bas file. Microsoft PowerPoint has its own file named CognosOfficeAutomationPPExample.bas.

The following macro files are installed.

<table>
<thead>
<tr>
<th>File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CognosOfficeAutomationExample.bas</td>
<td>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 Office document. It also contains wrapper functions that call the API exposed by IBM Cognos Office.</td>
</tr>
<tr>
<td>CognosOfficeAutomationPPExample.bas</td>
<td>This file is the same as the CognosOfficeAutomationExample.bas file, except that it is tailored to suit Microsoft PowerPoint.</td>
</tr>
<tr>
<td>CognosOfficeMessageSuppressor.cls</td>
<td>This file shows how to use the SuppressMessages API function.</td>
</tr>
</tbody>
</table>
Script files

Use the sample script files to help you with more advanced automation functions, such as scheduling the refresh of workbooks, documents, or presentations.

You must modify them 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
Chapter 8: 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 resources

Troubleshooting resources are sources of information that can help you resolve a problem that you are having with a product.

Sources of troubleshooting information include logs, debugging modes, documentation, and technical support. In addition to this document, the following troubleshooting resources are available when you work with IBM® Cognos® for Microsoft® Office:

- error messages (p. 97)
- log files (p. 97)
- Windows Event Viewer (p. 98)
- samples (p. 98)
- Technotes knowledgebase (p. 98)
- IBM Cognos Customer Center (p. 99)

Error messages

The first indication of a problem is often an error message. Error messages contain information that can be helpful in determining the cause of a problem.

Log files

Log files can help you troubleshoot problems by recording the activities that take place when you work with a product. Operations performed in IBM Cognos for Microsoft Office are recorded in a log file for tracking purposes.

Before you begin viewing log files, ensure that they contain the information that you need. The number of log files and the information they contain are set by parameters that you control. In most cases, the log file is locked while the application is running. To email the log file, you must exit the application first.

When troubleshooting, the following files can assist you:

IBM Cognos server log file

This file contains information about the Report Data Service processes.
IBM Cognos Office log file

This file contains information about IBM Cognos for Microsoft Office processes. You turn this log on or off by setting the Enable Logging check box in the Options dialog box in IBM Cognos for Microsoft Office.

For more information, see "Enable logging as a diagnostic tool" (p. 22).

Windows Event Viewer

Windows Event Viewer provides information about program, security, and system events. For example, if an IBM Cognos service fails to start, this fact is recorded in the event log.

Windows Event Viewer does not record information that is specific to operations or tasks performed in IBM Cognos for Microsoft Office. Consult the IBM Cognos for Microsoft Office log file for these problems.

For information about how to use Windows Event Viewer, see the Windows help.

Samples

IBM Cognos for Microsoft Office uses samples to highlight product features and to help you learn how to use the product. You can also use samples to troubleshoot problems. You can use the samples that come with IBM Cognos for Microsoft Office to determine if various components are working together as expected. For example, if you are having a problem running a report, you can try running a sample report to see if the problem persists. You may discover that the problem is related to connecting to a database.

Search the Technotes knowledge base

Technotes is a database of documents maintained by IBM Cognos support personnel that contains problems logged by customers. A problem that you are experiencing with IBM Cognos for Microsoft Office may already be reported by someone else, and a solution already found. If Technotes does not include the problem you are experiencing, you can call IBM Cognos Customer Center for individual assistance.

You can search the Technotes from anywhere on ibm.com. The Web page that you are on is the product filter. That means you can search the Technotes knowledge base by doing one or more of the following:

- Search from the top masthead that appears on any IBM Web page.
  
  Note: This method searches across all of IBM and is not recommended.

- Search from the main IBM Cognos Customer Center Web page at www.ibm.com/software/data/cognos/customercenter/.
  
  Searches all IBM Cognos products.

- Search from a particular product page.
  
  Returns only the documents that are associated with that product.
Call Cognos software services

If you are unable to resolve a problem using all other troubleshooting resources, call IBM Cognos support to receive immediate help. For information about IBM Cognos support locations and programs, see the IBM Cognos Customer Center Web site at (www.ibm.com/software/data/cognos/customercenter/).

To contact IBM Cognos Customer Center, you must have a current support agreement with Cognos, an IBM Company.

Before you call, do the following:

● Ensure that the problem is related to IBM Cognos software and results in an IBM Cognos error message.

● Attempt to reproduce the problem to ensure that it is not just a simple error.

● Check obvious things like file locations, directories, paths, and access.

● Review all relevant documentation, including any release notes or readme files.

● Check to see if any recent changes in your computing environment may be responsible for the problem.

Steps
1. Have the following information at hand:
   ● your customer identification number
   ● your case reference number, if it is an ongoing case
   ● 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 appear
   ● any steps you took to attempt to solve the problem

2. Contact the IBM Cognos support center nearest you.

3. You are asked whether this is a new or ongoing case. If it is an ongoing case, provide your case reference number or, if appropriate, your customer identification number.

If you don’t have support on the software about which you are calling, you will be directed to a support renewal representative.
Common errors

This section lists the most-common errors that you might encounter with IBM® Cognos® for Microsoft® Office. For a complete listing, which includes numbered error messages and warnings for IBM Cognos BI products, refer to the IBM Cognos Administration and Security Guide.

Configuration Issues

The following issues are related to configuration and setup.

The IBM 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 2.0 or later. Another possible reason for this condition is that the IBM Cognos Office COM 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 version 2.0 or later.

To install the IBM Cognos Office COM add-in, run the .msi program that is found on the installation CD. For more information, see the installation guide.

Before you attempt to install Microsoft .NET Programmability Support, you must have installed Microsoft .NET Framework version 2.0 or later.

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.

IBM Cognos Office Fails to Initialize in Microsoft Internet Explorer

If you use Internet Explorer to browse IBM Cognos Business Intelligence and open a workbook, document, or presentation published by IBM Cognos 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.

Steps to Configure Internet Explorer to Open Microsoft Office Documents in Microsoft Office Applications

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 IBM Cognos Office**
If you observe Microsoft Office trying to open a published document twice when you double-click the workbook, document, or presentation from 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.

**Steps to Reregister Workbook File Types for Microsoft Office Excel**
1. From the Start menu, click Run.

2. Type the following command and click OK.
   "C:\Program Files\Microsoft Office\Office\Excel.Exe" /regserver
   You can adapt this command to your environment by providing the proper local drive and location.

**Steps to Reregister Presentation File Types for Microsoft Office PowerPoint**
1. From the Start menu, click Run.

2. Type the following command and click OK.
   "C:\Program Files\Microsoft Office\Office\Powerpnt.Exe" /regserver
   You can adapt this command to your environment by providing the proper local drive and location.

**Steps to Reregister Document File Types for Microsoft Office Word**
1. From the Start menu, click Run.

2. Type the following command and click OK.
"C:\Program Files\Microsoft Office\Office\winword.exe" /regserver
You can adapt this command to your environment by providing the proper local drive and location.

Unable to Open Published Microsoft Office Documents from IBM 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.

Steps to Confirm Opening of Documents
1. Start the Windows Control Panel.
2. Double-click Folder Options.
3. From the Folder 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.

Steps to Reset Internet Security Options
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 PowerPlay Studio reports
The request to import a PowerPlay Studio report fails.

When using single signon with Microsoft® Internet Information Services (IIS), anonymous access must be enabled for users to access IBM® Cognos® for Microsoft Office documents that are based on PowerPlay reports. If necessary, a second PowerPlay gateway can be used to provide anonymous access for IBM Cognos for Microsoft Office. For more information, see the topic about specifying gateway mappings in the IBM Cognos BI Administration and Security Guide.
The administrator must follow these steps to enable Anonymous Access in IIS.

**Steps**

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.

**Error Messages, the .NET shortcut, or the .NET Console Are Not in the Language of the .NET Framework 2.0 That Was Installed**

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 as follows: 1033=en-en, 1036=fr-fr, 1031=de-de, and 1041=ja.

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
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <system.net>
    <settings>
      <httpWebRequest useUnsafeHeaderParsing="true"/>
    </settings>
  </system.net>
</configuration>
```
Reports Unavailable in IBM Cognos Connection Jobs after Using Save As Command in IBM 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 Windows XP or earlier, you must add GB18030 support for 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

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

The Content of the Cell-based Report Shows #NAME?

When building a cell-based report in IBM Cognos Analysis for Microsoft Excel®, the content of the cells shows #NAME?.

When you drag items from the source tree directly to a cell of a worksheet, you are creating a COGNAME or COGVAL formula that references the item in the database. This functionality is available only when the CognosOfficeUDF.Connect automation add-in is loaded.

If #NAME? appears in the contents of the cell, it means that the add-in was not loaded and the CognosOfficeUDF.Connect check box in the Add-in dialog box (Tools, Add-Ins) is not selected.

To resolve this issue and ensure that the add-in is always properly loaded, you must verify that the value of the OPEN registry key is set to /A "CognosOfficeUDF.Connect".

Steps
1. From the Windows Start menu, click Run.
2. In the Open box, type Regedit, and then click OK.
3. In the Registry Editor, go to the Registry branch:
HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\version\Excel\Options

4. In the right pane, under Name, right-click OPEN, and then click Modify.

5. In the Value Data box, type
   
   /A "CognosOfficeUDF.Connect"
   
6. Click OK, and then close the Registry Editor.

### Processing Issues

The following issues are related to processing and rendering reports.

**Processing time out**

Processing stopped because the server took too long to respond to your request for data.

Increase the processing time.

**Steps**

1. From the IBM Cognos tool bar, click Options.

2. In in the Processing time limit (milliseconds) box, type the number of milliseconds to wait for processing requests and click OK.

**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.

**Steps**

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.

**Steps to Restart the Report Data Service Server**

1. In a browser, connect to IBM Cognos BI 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 BI is not responding, start IBM Cognos Configuration.

7. Choose whether to start or restart IBM Cognos BI.
   - If IBM Cognos BI is not running, click **Start**.
   - If IBM Cognos BI 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 Business Intelligence. 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 Business Intelligence 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 hotfix 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, the following 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 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 Business Intelligence 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.

**Steps**

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/cgi-bin/cognos.cgi/

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/cgi-bin/cognos.cgi.

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.

---

### #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.

### 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:

\[
great_{\text{outdoors\_company}}.\text{Products}.\text{Products}.\text{Productline} -> \text{PC}.\text{\@MEMBER}.\text{[5~236]}
\]

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, \[great_{\text{outdoors\_company}}.\text{Products}.\text{Products}.\text{Productline} -> \text{PC}.\text{\@MEMBER}.\text{[5~236]}\] 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.

_steps to select the Always Prompt Option_

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 the following error message:

_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._

To resolve this problem, after an expired session, you must log on again.

_steps to Log On_

1. In the report list, right-click the top node item.
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 Office 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 or analysis to another worksheet. Or, you can move the data to a new location and try again.
**Error refreshing exploration saved in earlier version of Microsoft Excel**

This workbook may have been created with an older version of Microsoft Excel that has a set maximum number of rows or columns. For example, an earlier version of Microsoft Excel, such as Office 10 or Office 11, columns that go beyond the 256 maximum limit are truncated.

Although you are no longer using that version, the application is working within the limits of the older version of Excel. You may encounter this situation when you are expanding items or when you are refreshing items that have grown in size since the workbook was created.

To correct the problem, you must save the exploration with the .xlsx extension. Opening the exploration in Office 12 does not convert it to Office 12 format. Saving the exploration with the .xlsx extension converts the workbook to the 2007 format that supports columns exceeding the 256 column limit set in earlier versions of Excel.

**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.

**Error 0:RSV-BBP-0027 The Secondary Request Failed**

When you create a list report and you use the More or All option to view members, you get the following error:

*Error 0: RSV-BBP-0027 The secondary request failed. The requested session does not exist and failover has been disabled. Contact your Administrator.*

To resolve this issue, increase the number of rows that you can display on the worksheet.

**Steps**

1. On the IBM Cognos toolbar, click the Options button.
2. In the left navigation pane, click IBM Cognos Analysis.
3. Under Exploration Settings, in the Data Display Row Limit box, increase the number of rows so that you can display more or all of the remaining members in the list, and then click OK.

**Security Issues**

The following issues are related to security setup.
IBM 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.

Steps to Ensure that the CA Certificate is Trusted on the Client Workstation

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 Business Intelligence. 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.

IBM 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.
Chapter 8: Troubleshooting

**COI-ERR-2005 This version of Microsoft Office is not supported**
IBM Cognos Office supports the following Microsoft® Office applications: Microsoft Office Excel 2003 or 2007 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 or 2007 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003 to 2007, and Microsoft Office PowerPoint XP. 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.

**COI-ERR-2006 This Microsoft Office product is not supported**
IBM Cognos Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 or 2007 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 or 2007 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003 to 2007, and Microsoft Office PowerPoint XP. 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.

**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 Business Intelligence server.
To resolve this problem, reenter the System Gateway URI with the gateway address for a valid IBM Cognos BI 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 Office component, such as IBM Cognos Analysis for Microsoft Excel® or IBM Cognos for Microsoft Office.

To find the most current product documentation, including all translated documentation, access one of the IBM Cognos Information Centers at publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp.

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

**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 following directory:

C:\Documents and Settings\user name\Local Settings\Application Data\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>

**COI-ERR-2305 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-2307 Login failed**

Your user name and password are not correct.

Ensure that you typed a valid user name and password.
COI-ERR-2611 Help file not found

The help file is missing or corrupted.

To fix the problem, re-install your IBM Cognos Office component, such as IBM Cognos Analysis for Microsoft® Excel® or IBM Cognos for Microsoft Office.

To find the most current product documentation, including all translated documentation, access one of the IBM Cognos Information Centers at publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp.

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

Report Data Service (RDS) Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the server log, which is located at <IBM Cognos BI installation locations>/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® BI (or ReportNet®) was deployed to IBM Cognos BI 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 BI on a BEA WebLogic Application Server add the following to the JAVA_OPTIONS variable of the startManagedWebLogic.cmd (Windows) or startManagedWebLogic.sh (UNIX®) 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 BI 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 Could Not Be Run. The Expected Response Was Not Returned by PowerPlay

PowerPlay failed while running the report or Report Data Service cannot understand the output.

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 BI 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 Business Intelligence.

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 BI. For more information, see the IBM Cognos BI Installation and Configuration Guide.

RDS-ERR-1004 A Connection Could Not Be Established with IBM Cognos BI

IBM Cognos Business Intelligence is not responding.

Check the IBM Cognos BI logs. Ensure that IBM Cognos BI 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.
Chapter 8: Troubleshooting

**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 Business Intelligence. An error was returned by IBM Cognos BI 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 BI 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 BI. Series 7 content is no longer accessed 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 BI and published to IBM Cognos Connection.
For more information, see the IBM Cognos for Microsoft Office User Guide.

- 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 BI 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 Business Intelligence may have stopped processing. Ensure that IBM Cognos BI 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.

**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 BI Administration and Security Guide.
Chapter 8: Troubleshooting

**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 Business Intelligence or PowerPlay is not responding.

Ensure that IBM Cognos BI 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 Business Intelligence.

Ensure that IBM Cognos BI is running. Check the server log for error messages related to IBM Cognos BI.

**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.

Steps
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.

By using this method, you can cancel long running requests, such as running a report.

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 Business Intelligence 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 execute 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 Business Intelligence is corrupted.

Reinstall IBM Cognos BI.
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 Business Intelligence 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.
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.

COC-ERR-2006 Failed to Load the Portal Tree
This error occurs while attempting to log on to the IBM Cognos Business Intelligence Server from an IBM Cognos for Microsoft Office session. You must install .NET Framework v2.0 or later.
It may be because .NET Framework v2.0 or later is not installed, or it may be a connectivity issue.
It may also mean that the IBM Cognos BI 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 2.0 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 BI 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.
Chapter 8: Troubleshooting

**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.

**Steps**
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.

For more information, see the IBM Cognos for Microsoft Office User Guide.
Appendix A: Sample reports and packages

The IBM® Cognos® for Microsoft® Office products include sample reports and packages that are based on the fictional retail company, The Great Outdoors. After the samples are set up, you can find these reports in the samples subfolder under Public Folders and other studio reports and packages in the source tree on the IBM Cognos pane:

- GO Data Warehouse (analysis)
- GO Data Warehouse (query)
- Sales and Marketing (cube)

The Great Outdoors Company Samples

The Great 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.

For examples related to different kinds of businesses, see the product blueprints at www.ibm.com. For information about specific installation choices and environments, see the IBM® Cognos® "Architecture and Deployment Guide," or the Proven Practices and the IBM Cognos Implementation Roadmaps on www.ibm.com. For information about audit samples, see the IBM Cognos Administration and Security Guide. For information about Mobile samples, see the IBM Cognos Mobile Installation and Administration Guide.

The Great Outdoors Company, or GO Sales, or any variation of the Great 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.

Where to Find the Samples

The samples are included with the product and the samples for each studio are described in the related user guide and online help. To use the samples, you must install, set up, and configure them or contact your administrator to find out where they are installed. For instructions on how to install the samples, see the IBM Cognos Installation and Configuration Guide. For instructions on how to set up and configure samples, see the IBM Cognos Administration and Security Guide or the IBM Cognos Installation and Configuration Guide.

Samples Outline

The samples consist of the following:

- Two databases that contain all corporate data, and the related sample models for query and analysis
Appendix A: Sample reports and packages

- Five samples 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 dashboards
  
  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 everyone. To implement security, see the *Installation and Configuration Guide*.

The Great Outdoors Group of Companies

To make designing examples faster, especially financial examples, some general information about The Great Outdoors Company is useful. To look for samples that use particular product features, see the individual sample descriptions in this section.

Revenue for The Great 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 diagram below illustrates the consolidated corporate structure, including the percentage changes in ownership for GO Central Europe, and shows the reporting currency and GL prefix for each subsidiary.
Each corporation has the same departmental structure and the same GL structure, shown in the table below. Divisions may not report in the same currencies. For example, the Americas subsidiary reports in US dollars, but the Corporate division local currency is Canadian dollars, and the Operations division local currency is pesos.

<table>
<thead>
<tr>
<th>Division (GL)</th>
<th>Department (GL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate (1700)</td>
<td>Sales (1720)</td>
</tr>
<tr>
<td></td>
<td>Marketing (1750)</td>
</tr>
<tr>
<td></td>
<td>IS&amp;T (1760)</td>
</tr>
<tr>
<td></td>
<td>Human Resources (1730)</td>
</tr>
<tr>
<td></td>
<td>Finance (1740)</td>
</tr>
<tr>
<td></td>
<td>Procurement (1710)</td>
</tr>
<tr>
<td>Operations (1800)</td>
<td>Production and Distribution (1820)</td>
</tr>
<tr>
<td></td>
<td>Customer Service (1820)</td>
</tr>
</tbody>
</table>

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 Great 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 2006). 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 (p. 126). This authentication directory is necessary for the Transformer 8 cubes and for IBM® Cognos® Planning samples. No other samples depend on security profiles. For more information, see the IBM Cognos Business Intelligence Installation and Configuration Guide.

Sales and Marketing

Data about sales and marketing is available for all of the companies in the Great 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 Great 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 2005), 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 2005) 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 2005 uses sparklines and list data to review revenues at the retailer level.

Great Outdoors Database, Models, and Packages

The Great Outdoors models illustrate modeling techniques and support the samples. The models are based on the GO data warehouse and the GO sales transactional database 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.

For a description of each sample report or query, see the user guide for the studio that you open the sample in. For more information about modeling techniques, see the Guidelines for Modeling Metadata, or the IBM® Cognos® Framework Manager User Guide.

You must have access to Framework Manager, the modeling tool in IBM Cognos BI, to look at the sample models. You may also need to set up the sample databases and connections. For instructions, see the IBM Cognos Business Intelligence Administration and Security Guide or the IBM Cognos Business Intelligence Installation and Configuration Guide.

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, 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 very similar to the structure of the underlying database. All tables (database query subjects) are unchanged. This enables IBM Cognos BI to retrieve metadata directly from the package in most cases, instead of using a metadata call to the database. The following changes and additions have been made in the Database view:

- Joins have been added as necessary.
- To allow for aggregation at different levels of granularity, some model query subjects have been 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 have been 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 have been 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 have been created to organize each hierarchy. For example, see the employee hierarchies, where employees are organized by 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 very similar to the underlying database structure. The following changes and additions have been made in the Database view:

- To make it possible to join the fact tables to the time dimension, model query subjects and multipart joins have been used.
- Other joins have been added as necessary.

The Business view contains only model query subjects, with no joins. The following changes and additions have been 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 have been linked as reference shortcuts.
- Where the database has multiple hierarchies, new dimensions have been 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 Power Cubes

The following cubes are delivered with the Great Outdoors samples in English, French, German, Japanese and Chinese:

- sales_and_marketing.mdc
- employee_expenses.mdc
- go_accessories.mdc
The Samples Packages

The Great Outdoors samples include six packages. Below is a brief description of each available package.

Go Data Warehouse (analysis) is a dimensionally modeled view of the GOSALESDW database. This package can be used in all studios, including 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-dimensional 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.

Samples in the GO Data Warehouse (analysis) package

The following reports are some of the reports found in the GO Data Warehouse (analysis) package.

Budget vs. Actual

This report shows three years of data by retailer and retailer site for the camping equipment product line. Each year includes budget and actual data. This report uses the following features:

- summarizing
- crosstabs
- context filters

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:
Appendix A: Sample reports and packages

- filters
- lists
- conditional highlighting
- grouping

Sales Commissions for Central Europe

This report shows an annual summary of sales commissions, revenues, and gross profit for each branch in Central Europe. It also compares actual commission expenses with planned commission expenses. This report uses the following features:

- prompts
- expressions
- bar charts
- lists
- conditional highlighting
- drilling through
- custom headers and footers
- axis titles

Sales Growth Year Over Year

This report shows annual sales growth in both percentage and dollar amounts. This report uses the following features:

- bar charts
- lists
- filters
- sorting
- baselines
- axis titles

Samples in the GO Data Warehouse (query) package

The following reports are some of the reports found in the GO Data Warehouse (query) package.
Bursted Sales Performance Report

This list report shows how to burst a product sales report to a sales manager for Northern Europe sales staff. To successfully burst this report, IBM Cognos BI 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.

Revenue by Product Brand (2005)

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.

2005 Sales Summary

This report summarizes revenue and gross profit for 2005 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
Appendix B: Accessibility features for IBM Cognos for Microsoft Office

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

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" (p. 139)
- "Viewing reports or report items in Windows High Contrast Mode" (p. 140)

Keyboard navigation

You can use keyboard shortcuts to navigate through and perform tasks in IBM® Cognos® for Microsoft® Office. If you are using a screen reader, you may want to maximize your window so the keyboard shortcut tables in the following topics are completely expanded and accessible.

This product uses standard Microsoft Windows navigation keys in addition to application-specific keys.

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

If an action you use often does not have a shortcut key, you can record a macro in Microsoft Excel to create one.

You can use the following keyboard shortcuts when you want to start IBM Cognos Analysis for Microsoft Excel or IBM Cognos for Microsoft Office, or move to a button or menu on the IBM Cognos toolbar.

- "Access and use menus and IBM Cognos toolbar" (p. 136)
- "Access and use IBM Cognos pane" (p. 137)
- "Use dialog boxes" (p. 137)
- "Use tree view" (p. 138)

Access and use menus and IBM Cognos toolbar

<table>
<thead>
<tr>
<th>Goal</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start IBM Cognos Analysis for Microsoft Excel or IBM Cognos for Microsoft Office.</td>
<td>ALT (to place focus on the menu bar), CTRL+TAB (to move to the IBM Cognos button), ENTER.</td>
</tr>
<tr>
<td>When the IBM Cognos toolbar is selected, select the next or previous button or menu on the toolbar.</td>
<td>Office 12 users: LEFT ARROW or RIGHT ARROW Office 10 and Office 11 users: TAB or SHIFT+TAB.</td>
</tr>
<tr>
<td>When a menu or the IBM Cognos toolbar is active, move to the IBM Cognos Office pane.</td>
<td>Office 12 users: ALT+B to place focus on the IBM Cognos Office pane. Office 10 and Office 11 users: TAB to place focus on the IBM Cognos Office pane.</td>
</tr>
<tr>
<td>Select the first or last command on the menu or submenu.</td>
<td>HOME or END</td>
</tr>
<tr>
<td>Open the selected menu, or perform the action for the selected button or command.</td>
<td>ENTER</td>
</tr>
<tr>
<td>Open the context menu for the selected item or area of focus.</td>
<td>SHIFT+F10</td>
</tr>
<tr>
<td>Close an open context menu</td>
<td>ESC</td>
</tr>
</tbody>
</table>
## Access and use IBM Cognos pane

<table>
<thead>
<tr>
<th>Goal</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>When a menu or the IBM Cognos toolbar is active, move to the IBM Cognos pane.</td>
<td><em>Office 12 users:</em> ALT+B to place focus on the IBM Cognos pane.</td>
</tr>
<tr>
<td></td>
<td><em>Office 10 and Office 11 users:</em> TAB to place focus on the IBM Cognos pane.</td>
</tr>
<tr>
<td>When the IBM Cognos Office pane is active, select a component, such as IBM Cognos Analysis for Microsoft Excel or IBM Cognos for Microsoft Office.</td>
<td><em>Office 12 users:</em> CTRL+TAB, and then pressing LEFT ARROW or RIGHT ARROW.</td>
</tr>
<tr>
<td></td>
<td><em>Office 10 and Office 11 users:</em> TAB or SHIFT+TAB, and then pressing LEFT ARROW or RIGHT ARROW.</td>
</tr>
<tr>
<td>When the IBM Cognos Office pane is active, select the next or previous option in the pane.</td>
<td><em>Office 12 users:</em> CTRL+TAB</td>
</tr>
<tr>
<td></td>
<td><em>Office 10 and Office 11 users:</em> TAB or SHIFT+TAB</td>
</tr>
</tbody>
</table>

## Use dialog boxes

<table>
<thead>
<tr>
<th>Goal</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to the next option or option group.</td>
<td>TAB</td>
</tr>
<tr>
<td>Move to the previous option or option group.</td>
<td>SHIFT+TAB</td>
</tr>
<tr>
<td>Move between options in an open drop-down list, or between options in a group of options.</td>
<td>Arrow keys</td>
</tr>
<tr>
<td>Perform the action for the selected button, or select or clear the selected check box.</td>
<td>SPACEBAR</td>
</tr>
<tr>
<td>Open the list, if it is closed, and move to that option in the list.</td>
<td>First letter of an option in a drop-down list</td>
</tr>
</tbody>
</table>
### Appendix B: Accessibility features for IBM Cognos for Microsoft Office

<table>
<thead>
<tr>
<th><strong>Goal</strong></th>
<th><strong>Action</strong></th>
</tr>
</thead>
</table>
| Open the selected drop-down list. | Office 12 users:  
First letter of an option in a drop-down list  
Office 10 and Office 11 users:  
ALT+DOWN ARROW |
| Close the selected drop-down list. | Office 12 users:  
First letter of an option in a drop-down list  
Office 10 and Office 11 users:  
ALT+UP ARROW |
| Expand or collapse a folder. | ENTER |
| Cancel the command and close the dialog box. | ESC |
| When the **Open** dialog box is active, open the selected report locally from IBM Cognos Connection. | ALT+O |
| When the **Publish** dialog box is active and the appropriate folder is expanded, publish the selected Microsoft Office document to IBM Cognos Connection. | ALT+P |

#### Use tree view

<table>
<thead>
<tr>
<th><strong>Goal</strong></th>
<th><strong>Action</strong></th>
</tr>
</thead>
</table>
| Move to the first selectable node below.  
If the node below has children and the child node is expanded, move to the first child node. | DOWN ARROW |
| Move to the next selectable node above. | UP ARROW |
Keys for IBM Cognos for Microsoft Office

If an action you use often does not have a shortcut key, you can record a macro in Microsoft Excel to create one.

You can use the following keyboard shortcuts when you want to select reports or report items to import into Microsoft Excel, Microsoft Word, or Microsoft PowerPoint.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand the selected node, or move to the</td>
<td>RIGHT ARROW</td>
</tr>
<tr>
<td>first selectable child node</td>
<td></td>
</tr>
<tr>
<td>Collapse the selected node, move to the</td>
<td>LEFT ARROW</td>
</tr>
<tr>
<td>parent node, or move to the first</td>
<td></td>
</tr>
<tr>
<td>selectable node above.</td>
<td></td>
</tr>
<tr>
<td>Move to the first node in a tree control.</td>
<td>HOME</td>
</tr>
<tr>
<td>Move to the last node in a tree control.</td>
<td>END</td>
</tr>
</tbody>
</table>

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

See the IBM® Human Ability and Accessibility Center ([www.ibm.com/able](http://www.ibm.com/able)) for more information about the commitment that IBM has to accessibility.
Appendix C: Rebranding IBM 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 Cognos Analysis for Microsoft Excel®, IBM Cognos Office, and IBM® Cognos® for Microsoft® Office versions 8.4 and later.

Resource Files

All the customizable strings for IBM® Cognos® Office products are located 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 or Microsoft Word) 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 completely 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 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>
<thead>
<tr>
<th>Language</th>
<th>IBM Cognos Analysis for Microsoft Excel files (internal name cor)</th>
<th>IBM Cognos for Microsoft Office files (internal name coc)</th>
<th>IBM Cognos Office files (internal name coi)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Neutral</td>
<td>cormsgs.resx</td>
<td>cocmsg.resx</td>
<td>coimsgs.resx</td>
</tr>
<tr>
<td>Chinese (simplified)</td>
<td>cormsgs.zh-cn.resx</td>
<td>cocmsg.zh-cn.resx</td>
<td>coimsgs.zh-cn.resx</td>
</tr>
<tr>
<td>Chinese (traditional)</td>
<td>cormsgs.zh-tw.resx</td>
<td>cocmsg.zh-tw.resx</td>
<td>coimsgs.zh-tw.resx</td>
</tr>
<tr>
<td>Czech</td>
<td>cormsgs.cs.resx</td>
<td>cocmsg.cs.resx</td>
<td>coimsgs.cs.resx</td>
</tr>
<tr>
<td>Dutch</td>
<td>cormsgs.nl.resx</td>
<td>cocmsg.nl.resx</td>
<td>coimsgs.nl.resx</td>
</tr>
<tr>
<td>English</td>
<td>cormsgs.en.resx</td>
<td>cocmsg.en.resx</td>
<td>coimsgs.en.resx</td>
</tr>
<tr>
<td>Finnish</td>
<td>cormsgs.fi.resx</td>
<td>cocmsg.fi.resx</td>
<td>coimsgs.fi.resx</td>
</tr>
</tbody>
</table>
Rebranding or Localizing IBM 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 Cognos Analysis 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 (p. 143).

❑ Download and then run the Resource File Generator (Resgen.exe) required for compiling the updated resource files (p. 144).

<table>
<thead>
<tr>
<th>Language</th>
<th>IBM Cognos Analysis for Microsoft Excel files (internal name cor)</th>
<th>IBM Cognos for Microsoft Office files (internal name coc)</th>
<th>IBM Cognos Office files (internal name coi)</th>
</tr>
</thead>
<tbody>
<tr>
<td>French</td>
<td>cormsgs.fr.resx</td>
<td>cocmsg.f.resx</td>
<td>coimg.f.resx</td>
</tr>
<tr>
<td>German</td>
<td>cormsgs.de.resx</td>
<td>cocmsgd.resx</td>
<td>coimgd.resx</td>
</tr>
<tr>
<td>Hungarian</td>
<td>cormsgs.hu.resx</td>
<td>cocmsg.h.resx</td>
<td>coimg.h.resx</td>
</tr>
<tr>
<td>Italian</td>
<td>cormsgs.it.resx</td>
<td>cocmsgi.resx</td>
<td>coimgi.resx</td>
</tr>
<tr>
<td>Japanese</td>
<td>cormsgs.ja.resx</td>
<td>cocmsg.j.resx</td>
<td>coimg.j.resx</td>
</tr>
<tr>
<td>Korean</td>
<td>cormsgs.ko.resx</td>
<td>cocmsg.k.resx</td>
<td>coimg.k.resx</td>
</tr>
<tr>
<td>Polish</td>
<td>cormsgs.pl.resx</td>
<td>cocmsg.pl.resx</td>
<td>coimg.pl.resx</td>
</tr>
<tr>
<td>Portuguese</td>
<td>cormsgs.pt.resx</td>
<td>cocmsg.p.resx</td>
<td>coimg.p.resx</td>
</tr>
<tr>
<td>Romanian</td>
<td>cormsgs.ro.resx</td>
<td>cocmsg.r.resx</td>
<td>coimg.r.resx</td>
</tr>
<tr>
<td>Russian</td>
<td>cormsgs.ru.resx</td>
<td>cocmsg.ru.resx</td>
<td>coimg.ru.resx</td>
</tr>
<tr>
<td>Spanish</td>
<td>cormsgs.es.resx</td>
<td>cocmsg.e.resx</td>
<td>coimg.e.resx</td>
</tr>
<tr>
<td>Swedish</td>
<td>cormsgs(sv).resx</td>
<td>cocmsg.s.resx</td>
<td>coimg.s.resx</td>
</tr>
<tr>
<td>Turkish</td>
<td>cormsgs.tr.resx</td>
<td>cocmsg.t.resx</td>
<td>coimg.t.resx</td>
</tr>
</tbody>
</table>
Test your work (p. 144).

Edit the Resource (.resx) Files

For each component, there exists a set of files that support the various languages. The country code distinguishes the filenames. With the exception of the language-neutral set of files (cormsgs.resx, cocmsgs.resx, and coimsgs.resx) that serve as the default files, each file follows the following naming convention:

```
(componentcodemsgs.languagecode.resx)
```

You can change strings, not icon or graphic resources.

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

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

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

**Steps**

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\Cognos\Cognos for Microsoft Office\resources
   ```

3. In an XML Editor, open the `componentcodemsgs.languagecode.resx` file.
   
   Use an editor such as Visual Studio or XMLSpy to change the branding details or to translate strings into another language.

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

4. Save the file.

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

The updated resource files are now ready to be compiled.
Compile 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.

Steps

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 "C:\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 files directory.

Test 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 Cognos Analysis 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.
Glossary

action
A task that affects the performance of an individual metric. Metric Studio tracks the dates, resources, and status of actions and their relationship to a metric.

agent
The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform.

alias
An alternative name used instead of a primary name.

attribute
In dimensional models, a property that provides qualitative information about members of a level in a dimension. For example, the Store level within the Retailer dimension might have properties such as address or retail space. In general, dimensional attributes do not have measure values or rollups associated with them, but are used to locate or filter members.

In relational models, a query item that is not a measure or identifier. When a query item is an attribute, it is not intended to be aggregated, or used for grouping or generating prompt pick lists.

In BI modeling, a characteristic of an entity which is descriptive rather than a unique identifier or an aggregative measure.

In TM1, a property that provides qualitative information about dimensions.

authentication
The process of validating the identity of a user or server.

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.

cascading prompt
A prompt that uses values from a previous prompt to filter the values in the current prompt or pick list.

certificate
In computer security, a digital document that binds a public key to the identity of the certificate owner, thereby enabling the certificate owner to be authenticated. A certificate is issued by a certificate authority and is digitally signed by that authority.
**Common Gateway Interface**
An Internet standard for defining scripts that pass information from a web server to an application program, through an HTTP request, and vice versa.

**condition**
An expression that yields a Boolean value. Conditions are used in query expressions, query filters, and Boolean report variables that can be used for conditional formatting, styles, data sources, layouts, and blocks.

**content locale**
A code that is used to set the language or dialect used for browsers and report text, and the regional preferences, such as formats for time, date, money, money expressions, and time of day.

**cube**
A multidimensional representation of data needed for online analytical processing, multidimensional reporting, or multidimensional planning applications.

**dashboard**
A web page that can contain one or more widgets that graphically represent business data.

**data source**
The source of data itself, such as a database or XML file, and the connection information necessary for accessing the data.

In TM1®, the file or data used as the source for the TurboIntegrator import process.

**data tree**
Within a studio, a structure that contains objects such as query subjects, query items, dimensions, levels, and members. A data tree is used as a palette of the available data that can be inserted into calculations, filters, display areas, and other authoring gestures.

**deployment**
The process of moving an application (such as a report or model) to a different instance. For example, reports are often created in a test environment and then deployed to production. When an application is deployed, it is Approved, transferred, and imported.

**dimension**
In Cognos Planning, a list of related items such as Profit and Loss items, months, products, customers, and cost centers, including calculations. The rows, columns, and pages of a cube are created from dimensions.

In Cognos BI, TM1, and Express, a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or locations. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members or special categories.
**event**
A change to a state, such as the completion or failure of an operation, business process, or human task, that can trigger a subsequent action, such as persisting the event data to a data repository or invoking another business process.

In Cognos Real-Time Monitoring and Cognos Now!, a row or a series of rows of data.

**gateway**
An extension of a Web server program that transfers information from the Web server to another server. Gateways are often CGI programs, but may follow other standards such as ISAPI and Apache modules.

**hierarchy**
The organization of a set of entities into a tree structure, with each entity (except the root) having one or more parent entities and an arbitrary number of child entities.

In Data Manager, a particular view of a business dimension. A hierarchy contains the definition of related reference data that is organized into a tree structure of members related as parents and children.

**information pane**
In Analysis Studio, a pane that helps the user to confirm their selection in the data tree by displaying related information, such as the level and attributes.

**job**
A group of runnable objects, such as reports, agents, and other jobs that the user runs and schedules as a batch.

**layout**
The arrangement of printed matter on a screen or page, including margins, line spacing, type specification, header and footer information, indents, and more.

**locale**
A setting that identifies language or geography and determines formatting conventions such as collation, case conversion, character classification, the language of messages, date and time representation, and numeric representation.

**namespace**
For authentication and access control, a configured instance of an authentication provider that allows access to user and group information. In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.

In XML and XQuery, a uniform resource identifier (URI) that provides a unique name to associate with the element, attribute, and type definitions in an XML schema or with the names of elements, attributes, types, functions, and errors in XQuery expressions.
**prompt**
A report element that asks for parameter values before the report is run.

**publish**
In Cognos BI, to expose all or part of a Framework Manager model or Transformer PowerCube, through a package, to the Cognos server, so that the data can be used to create reports and other content.

In Cognos Planning, to copy the data from Contributor or Analyst to a data store, typically so that the data can be used for reporting purposes.

**repeater**
In Report Studio, a cell container that repeats values within itself with no predefined internal structure.

**repeater table**
In Report Studio, a table-like container that repeats cells across and down the page or row in the associated query.

**report**
A set of data deliberately laid out to communicate business information.

**report specification**
An executable definition of a report, including query and layout rules, which can be combined with data to produce a report output.

**report view**
A reference to another report that has its own properties, such as prompt values, schedules, and results. Report views can be used to share a report specification instead of making copies of it.

**thumbnail**
An icon-sized rendering of a larger graphic image that permits a user to preview the image without opening a view or graphical editor.

**widget**
A portable, reusable application or piece of dynamic content that can be placed into a web page, receive input, and communicate with an application or with another widget.
Index

Symbols
.NET Framework
  troubleshooting, 103
  version, 100
.NET programmability support, 100
#ERROR
  troubleshooting in Microsoft Excel, 108
#NAME? errors, 104

A
accessibility
  features in product, 135
accessibility features
  interface information, 139
  support of, 9
actions
  definition, 145
add-ins, 15
agents
  definition, 145
aggregating
  samples and time dimensions, 128
aliases
  definition, 145
All option
  Error 0:RSV-BBP-0027 error, 110
Always Prompt (property value), 108
anonymous access, 102
API functions
  ClearAllData, 90
  exposing through automation objects, 87
  HTTPLogon Credentials, 88
  Logoff, 92
  Logon, 89
  Publish method, 91
  RefreshAllData, 90
  SuppressMessages, 92
  TraceLog, 92
  UnlinkAllData, 90
  applications, 15
    associated icons, 17
    setting up startup, 19
attributes
  definition, 145
authentication
  definition, 145
  enabling single signon, 21
  forms-based authentication, 21
Automate_COI_Excel.vbs, 95
Automate_COI_PowerPoint.vbs, 95
Automate_COI_Word.vbs, 95
Automate_COI.vbs, 95
automatic page breaks, 41, 44
automation
  clearing data values, 90
  disconnecting link to IBM Cognos server, 90
  IBM Cognos Office, 85
  logging errors, 87
  logging off all the IBM Cognos servers, 92
  logging on, 89
  refreshing data, 90
  sample macro files, 94
  suppressing alerts and messages, 92
  tracking activities and errors, 92

B
BEA WebLogic
  parser collision with Report Data Service, 114
best practices
  Microsoft Excel, 80
  Microsoft PowerPoint, 82
  Microsoft Word, 83
  report design, 77
bo\heap Buffer Overflow
  troubleshooting, 101
bookmarks (in Word), 32
Browse Content tab
  purpose of, 32
burst keys
  definition, 145
business cards
  enabling and disablingumbnails, 31

C
  cache
    clearing in IBM Cognos Analysis for Microsoft Excel, 23
cascading prompts
    definition, 145
cell-based reports
    #NAME? errors, 104
Certificate Authority (CA)
  security errors, 118
  unable to create trust relationship, 111
certificates
  definition, 145
charts
  best practices in PowerPoint, 83
  imported as images, 78
  importing into Word, 83
  missing in imported reports, 106
ClearAllData (API function), 90
Clear Cache on save, 23
COC-ERR-2609 error, 123
CognosOfficeAutomationExample.bas, 86, 94
CognosOfficeAutomationPPExample.bas, 94
CognosOfficeMessageSuppressor.cls, 94
Com Add-in
  Excel workbook closes unexpectedly, 103
common gateway interface (CGI)
  definition, 145
conditional blocks, 33
conditions
  definition, 146
configuration
  issues, 100
connections
  testing, 10
content
  refreshing, 51, 55
content language
  settings in IBM Cognos Connection, 33
content locale
  definition, 146
Content Manager
  resolving unresponsiveness, 116
troubleshooting communication problems, 118
Copy command
  using in PowerPoint, 82
creating templates, 79
credentials
  accessing images on IBM Cognos report servers, 81
cubes
  definition, 146
  importing, 10
Custom Property
  troubleshooting, 123
D
dashboard
  definition, 146
dashboards
  importing, 9
  importing content from, 38
data
  deleting, 57
  refreshing, 51, 55
data formats, 80
  negative numbers, 82
data items
  converting static data, 26
data size limits, 117
data source
  maintaining connections, 82
data sources
  connecting from IBM Cognos Analysis for Microsoft Excel, 20
  definition, 146
data trees
  definition, 146
data validation
  using the Excel list, 82
deleting
  report data from a workbook, 57
  reports from a workbook, 57
deployment
  definition, 146
dimensions
  definition, 146
disabling
  logging, 22
displaying
  non-scaled values in Microsoft Excel, 11
document variables (Word 2007), 106
DPR-ERR-2079 error, 109

E
East Asian characters, 104

enabling
  AutoLogFile, 87
Error 0xRSV-BBP-0027, 110

error messages
  #ERROR appears in cells with multiple images in a
cell, 108
  bo\:heap Buffer Overflow, 101
cannot render this report, 105
COC-ERR-2005 import failed, 121
COC-ERR-2006 failed to load the portal tree, 121
COC-ERR-2014 refresh failed, 121
COC-ERR-2015 failed to open the import wizard
dialog, 122
COC-ERR-2301 logon failed, 122
COC-ERR-2303 report is not valid for render-
ing, 122
COC-ERR-2305 Microsoft Excel returned an
error, 122
COC-ERR-2308 report specification is empty, 122
COC-ERR-2603 you must add a slide to the presen-
tation before importing any content, 122
COC-ERR-2607, 122
COC-ERR-2609, 123
COI-ERR-2002 Block type is not valid, 111
COI-ERR-2005 this version of Microsoft Office is
not supported, 112
COI-ERR-2006 This Microsoft Office product is
not supported, 112
COI-ERR-2008 Unable to retrieve from
resources, 112
COI-ERR-2009 Unable to perform this operation
because Microsoft Excel is in Edit mode, 112
COI-ERR-2010 The name [0] is not valid. A name
must not contain both a quote (" ) character and
an apostrophe ( ) character, 112
COI-ERR-2011 The server did not return the
expected response, 112
COI-ERR-2305 Unable to perform this operation
because Microsoft Excel is in Edit mode, 113
COI-ERR-2307 Login Failed, 113
COI-ERR-2611 Help File Not Found, 114
dispatcher is unable to process the request, 108
Excel workbook closes unexpectedly, 103
IBM Cognos Office fails to initialize in Microsoft
Internet Explorer, 100
IBM Cognos Office Fails to Initialize in Microsoft
Office, 100
IBM Cognos Office unable to create trust relation-
ship, 111
imported reports are missing charts or images, 106
Microsoft Office Excel does not open a workbook
published from IBM Cognos Office, 101
Object reference not set to an instance of an
object, 110
prompted reports, 117
RDS Data Limit Exceeded, 105
RDS-ERR-1000 Report Data Service could not
process the response from the content
provider, 114
RDS-ERR-1001 PowerPlay report could not be
run, 115
RDS-ERR-1003 The file could not be read, 115
RDS-ERR-1004 connection could not be established
with IBM Cognos BI, 115
RDS-ERR-1005 login requirements for IBM Cognos
BI could not be obtained, 115
RDS-ERR-1011 Report Data Service was unable to
retrieve the locale, 115
RDS-ERR-1012 IBM Cognos Content Service unable
discover the content providers, 116
RDS-ERR-1013 Report Data Service unable to query
Content Manager, 116
RDS-ERR-1014 Report Data Service unable to create
the document object, 116
RDS-ERR-1015 Report Data Service unable to create
a new document version, 116
RDS-ERR-1016 Report Data Service unable to create
a new document content object, 116
RDS-ERR-1018 IBM Cognos BI report could not
be run, 116
RDS-ERR-1019 IBM Cognos Content Service unable
to retrieve portal information from IBM Cognos
Connection, 117
RDS-ERR-1020 currently provided credentials are
invalid, 117
Index

RDS-ERR-1021 IBM Cognos BI report could not be run because it contains unanswered prompts, 117
RDS-ERR-1022 request received by Report Data Service is not valid, 117
RDS-ERR-1023 report could not be run because it exceeds the Report Data Service data size limit set by the administrator, 117
RDS-ERR-1027 encoding for the PowerPlay server could not be determined, 118
RDS-ERR-1028, 116
RDS-ERR-1030 security error occurred while trying to establish a connection, 118
RDS-ERR-1031 Report Data Service was unable to retrieve the metadata for report, 118
RDS-ERR-1033 Report Data Service unable to create the report view, 118
RDS-ERR-1034 report specification for report could not be retrieved from IBM Cognos BI, 118
RDS-ERR-1037 The Configuration for Report Data Service could not be updated, 118
RDS-ERR-1038 The server locale could not be determined, 118
RDS-ERR-1039 request could not be cancelled. request is no longer running, 118
RDS-ERR-1040 conversation with conversation ID has been cancelled, 119
RDS-ERR-1041 The object (object ID) could not be deleted, 119
RDS-ERR-1042 Prompt answers could not be found, 119
RDS-ERR-1043 Unable to parse style definition, 119
RDS-ERR-1044 The output for the requested version could not be retrieved, 119
RDS-ERR-1045 LayoutDataXML Output was not generated, 120
RDS-ERR-1047 Unable to process the XML output stream, 120
RDS-ERR-1048 Unable to process the context selection specification, 120
RDS-ERR-1049 Report Data Service was unable to create an object in the content store, 120
RDS-ERR-1050 Drill operations on the IBM Cognos BI report, 120
RDS-ERR-1053 The credential format received by the Report Data Service is invalid, 120
RDS-ERR-1055 An error occurred trying to load the supported conversion formats, 120
RDS-ERR-1057 A runtime error occurred while report data service was processing the request, 121
RDS Server unavailable, 106
Report Data Service (RDS) numbered error messages, 114
reports unavailable in IBM Cognos Connection jobs after using Save As command in IBM Cognos Report Studio, 104
This item cannot be expanded, 109, 110
unable to open published Microsoft Office documents from IBM Cognos BI, 102
unable to view reports after clicking view report, 111
events
definition, 146
expired sessions, 109
exposing API functions, 87
F
field codes
importing text as, 84
file size
clearing the local cache, 23
file types
registering, 101
firewall security rejection, 109
folders
refreshing, 56
fonts
linking to core fonts, 104
footers
in Word, 83
restrictions in Excel, 81
formatting
minimizing during report design, 79
formatting content, 80
formatting properties
unsupported, 34
forms-based authentication, 21
formulas
removing, 25
G
gateway address
defining, 20
gateways
definition, 147
GB18030
support, 104
GO Data Warehouse (analysis) package (samples), 131
GO Data Warehouse (query) package (samples), 132
GO Sales (analysis) sample, 134
Governor limit setting
troubleshooting, 117
Great Outdoors Company, 126
databases, models, and packages, 129
samples, 125
Great Outdoors Company samples, 125
Group option, 32

H
Han characters
troubleshooting, 104
headers
in Word, 83
restrictions in Excel, 81
Hide Label option, 32
hierarchies
definition, 147
HLOOKUP function (Excel)
finding records, 80
hotfixes (Word 2007), 106
HTML code, 33
HTTPLogonCredentials (API function), 88
hyperlinks, 33

I
IBM Cognos Analysis for Microsoft Excel
cell-based report errors, 104
clearing cache, 23
user roles and responsibilities, 15
IBM Cognos BI gateway addresses, 112
IBM Cognos Business Insight, 38
IBM Cognos Connection, 26, 32, 41, 44, 60
content language settings, 33
downloading Microsoft Office documents, 28
opening Microsoft Office documents, 27
troubleshooting unavailable reports, 104
unable to open published Microsoft Office documents, 102
unable to retrieve portal information, 117
IBM Cognos for Microsoft Office
accessibility, 135
batch log files, 97
data size limits, 117
downloading documents in IBM Cognos Connection, 28
firewall security rejection, 109
keyboard shortcuts, 139
numbered error messages, 121
opening in Microsoft Word, 100
pane, 30
samples, 98
troubleshooting rendering reports, 105
unable to view reports, 111
user roles and responsibilities, 15
IBM Cognos for Microsoft Office gateway
log files, 97
IBM Cognos for Microsoft Office report server
log files, 97
IBM Cognos gateway
defining address, 20
IBM Cognos Office
applications, 15
automating, 85
configuration and setup issues, 100
downloading documents in IBM Cognos Connection, 28
failure to initialize in Microsoft Office, 100
interface elements, 15
keyboard shortcuts, 136
numbered error messages, 111
processing issues, 105
security issues, 110
setting preferences, 19
starting, 18
supported Microsoft Office applications, 112
troubleshooting opening published documents, 101
IBM Cognos Office page icon, 17
IBM Cognos Office pane, 17
showing or hiding, 18
suppressing, 19
IBM Cognos pane
Browse Content tab, 55
in IBM Cognos for Microsoft Office, 30
Manage Content tab, 54
Index

IBM Cognos servers
  logging on, 23
IBM Cognos support, 99
IBM Cognos systems
  defining, 20
Ignore Formatting option, 32
IIS (Internet Information Services)
  using single signon, 102
image maps
  limiting chart metadata, 78
images
  defining properties, 80
  missing in imported reports, 106
  multiple images in Microsoft Excel, 108
  URL-based, 81
Import Content wizard
  failure to open, 122
importing
  dashboards, 9
  PowerPlay cubes, 10
  report elements, 32, 41, 44
  supported formatting styles, 35
importing report items
  keyboard shortcuts, 139
information
  viewing, 51, 54
information panes
  definition, 147
installations
  COM add-in, 100
  corrupted IBM Cognos BI installation, 115
Internet Explorer, 100

J
Japanese characters
  troubleshooting, 104
jobs
  definition, 147

K
keyboard shortcuts, 135
Knowledge Base, 98
Korean characters
  troubleshooting, 104

L
languages
  troubleshooting pack subkeys, 103
layouts
  definition, 147
linked fonts, 104
list reports
  More or All errors, 110
lists
  data validation in Excel, 82
  importing as an Excel list, 81
locales
  definition, 147
  troubleshooting Report Data Service, 115
locale setting
  ignoring content language setting, 33
log files, 22, 97
  enabling, 22
logging on
  API function for new credentials, 88
  enabling single signon, 21
  Logon API function, 89
  multiple IBM Cognos servers or packages, 23
  sample API code, 93
  through forms-based authentication, 21
Logoff (API function), 92
Logon (API function), 89

M
macro files, 94
Manage Data tab
  purpose of, 30
merged cells, 34
methods
  Publish, 10, 91
Microsoft .NET support for Microsoft applications is not installed, 122
Microsoft Excel
  #ERROR, 108
  #NAME? errors, 104
  applying formatting, 82
  best practices, 80
  clearing cell contents, 25
  COC-ERR-2305 error, 122
  COC-ERR-2607 error, 122
  header restrictions, 81
importing charts as images, 78
importing lists, 81
limitations in rendering reports, 81
More or All errors, 110
no report content is imported, 108
refreshing content, troubleshooting, 112, 113
rendering report colors, 81
row and column restrictions, resolving, 109, 110
troubleshooting number of worksheets, 81
using lists for data validation, 82
using page breaks, 82
workbook closes unexpectedly, 103
Microsoft Internet Explorer
cannot initialize IBM Cognos Office, 100
setting options in IBM Cognos Office, 120
setting security options, 102
Microsoft Office
managing templates, 79
supported applications are not installed, 122
Microsoft Office documents
downloading from IBM Cognos Connection, 28
opening from IBM Cognos Connection, 27
Microsoft Outlook
resolving IBM Cognos for Microsoft Office issues, 100
Microsoft PowerPoint
best practices, 82
creating tables and charts, 83
importing charts as images, 78
inserting soft page breaks, 41
table size restrictions, 79
troubleshooting importing slides, 122
troubleshooting report format and layout, 116
using copy and paste commands, 82
Microsoft Word
best practices, 83
bookmarks, 32
creating text box titles, 83
IBM Cognos for Microsoft Office does not start, 100
importing charts and tables, 83
inserting soft page breaks, 44
missing report objects, 106
table size restrictions, 79
models
connecting to the data source, 20
sample models and packages, 129
More option
Error 0\RSV-BBP-0027 error, 110
N
named ranges, 32
namespaces
definition, 147
troubleshooting logging on, 115
native language support, 104
navigation keys, 135
nested reports
troubleshooting, 122
non-English operating system
troubleshooting .NET Framework, 103
non-saled values
displaying in Microsoft Excel, 11
O
opening
workbooks from IBM Cognos Connection, 26
options
Group, 32
Hide Label, 32
Ignore Formatting, 32
Repeat Label, 32
setting for IBM Cognos Office, 19
Show as List, 32
P
packages
connection to the data source, 20
GO Data Warehouse (analysis), 131
GO Data Warehouse (query), 132
GO Sales (analysis) sample, 134
logging on, 23
Sales and Marketing (Cube), 133
page breaks, 11
in Microsoft Excel, 82
Paste command
using in PowerPoint, 82
patches, Word, 106
performance degradation, 79
PIAs (Primary Interop Assemblies)
installing subkeys, 100
plug-ins, 15
Index

PowerPlay, 52
  connection problems, 116
  failure to retrieve metadata, 118
  troubleshooting running reports, 115
  unresponsiveness, troubleshooting, 118
PowerPlay cubes
  importing, 10
PowerPlay Studio, 102
preferences
  setting for IBM Cognos Office, 19
presentations
  importing report elements, 41, 44
Primary Interop Assemblies (PIAs), 100
processing errors
  timed out, 105
  processing issues, 105
prompted reports, 32, 41, 44
  error messages, 117
  incorrect format for the Prompt value, 108
  troubleshooting answers to prompts, 119
prompts, 12, 32, 41, 44
  definition, 147
prompt values, 12
Properties pane
  in IBM Cognos for Microsoft Office, 30
published documents
  opening in Microsoft Office, 101
  unable to open from IBM Cognos Connection, 102
publishing
  definition, 148
  fixed content, 79
  workbooks to IBM Cognos Connection, 26
Publish method, 10, 91

Q
Query Studio, 52

R
RDS-ERR-1011 error, 115
RDS-ERR-1037 error, 118
RDS-ERR 1038 error, 118
RDS-ERR 1041 error, 119
RDS-ERR 1042 error, 119
RDS-ERR 1043 error, 119
RDS-ERR 1047, 120
RDS-ERR 1048, 120
RDS-ERR 1049, 120
RDS-ERR 1050, 120
RDS-ERR 1053, 120
RDS-ERR 1055, 120
RDS-ERR 1057, 121
recommendations, 77
refresh
  IBM Cognos for Microsoft Office, 121
RefreshAllData (API function), 90
Refresh All Data command, 25
refreshing
  content, 51, 55
  data, 51, 55
  folders, 56
  report elements, 56
refreshing data
  ignoring formatting, 80
Remove Report command
  as best practice, 79
removing
  report data, 57
rendering
  report content, 11
rendering reports
  limitations, 81
repeater blocks, 33
repeaters
  definition, 148
repeater tables, 33
  definition, 148
Repeat Label option, 32
report colors
  rendering in Microsoft Excel, 81
report content
  rendering, 11
report data
  removing, 57
Report Data Service (RDS)
  cancelling requests, 119
  configuration, troubleshooting, 118
  creating the report view, troubleshooting, 118
  Data Limit Exceeded errors, 105
  failure to connect to PowerPlay Enterprise Server, 116
  locale retrievability, troubleshooting, 115
  numbered error messages, 114
report names with quotation marks, 108
running IBM Cognos Connection, 60
pompted, troubleshooting, 107
prompted reports in IBM Cognos for Microsoft Office, 108
rendering report colors in Excel, 81
report names with quotation marks, 108
running IBM Cognos for Microsoft Office reports
after expired session, 109
securing, 21
troubleshooting importing report content, 108
troubleshooting missing charts or images, 106
troubleshooting nested reports, 122
troubleshooting report rendering problems, 105
unable to view reports in IBM Cognos for Microsoft Office, 111
versions, 12
viewing or running output versions, 53
report samples, 125
report specifications
definition, 148
missing content, 122
troubleshooting parsing a report style, 119
Report Studio
IBM Cognos pane, 52
saving changes in a job, 104
report versions, 12
report views
definition, 148
rich text items, 33
RSV-CM-2005 (error message), 107
running
reports, 51
S
Sales and Marketing (Cube) package (samples), 133
samples, 98, 125
cubes, 130
database, models, and packages, 129
employees, 128
GO data warehouse, 129
GO Data Warehouse (analysis) package, 131
GO Data Warehouse (query) package, 132
GO Sales (analysis) package, 134
GO Sales transactional database, 130
packages, 131
Sales and Marketing (Cube) package, 133
sales and marketing data, 128
The Great Outdoors Company, 126
saving
workbooks, 60
scaling, 35
screen reader, 135
Section 508
support for, 9
security
clearing the local cache, 23
enabling single signon, 21
using forms-based authentication, 21
security issues, 110
servers
logging on, 23
setup issues, 100
Index

shortcut keys, 135
  for IBM Cognos for Microsoft Office, 139
  for IBM Cognos Office, 136
Show as List option, 32
Simplified Chinese troubleshooting, 104
single signon, 102
  forms-based authentication, 21
  setup, 21
SiteMinder
  API function in IBM Cognos Office, 88
  logging on to a namespace, 115
  using single signon, 21
smart tags
  in Word, 83
soft page breaks, 11
  inserting, 41, 44
source data
  updating, 25
startup application
  setting up, 19
static data items, 26
support, IBM Cognos, 99
SuppressMessages (API function), 92

T
tables
  best practices in PowerPoint, 83
  importing into Word, 83
  restricting size before importing, 79
Technotes knowledge base, 98
templates
  limiting data access, 79
testing
  connections, 10
thumbnails
  definition, 148
time out
  processing errors, 105
toolbar
  turning on, 18
TraceLog (API function), 92
troubleshooting, 97
  importing PowerPlay Studio reports, 102
  resources, 97
  Word 2007, 106

U
UnlinkAllData (API function), 90
updating source data, 25
user credentials
  automating logon, 88
  RDS-ERR-1020, 117
user interfaces
  IBM Cognos Office, 15
user preferences
  content language setting, 33

V
validation
  using the Excel list, 82
VBA (Visual Basic for Applications)
  examples, 93
VBS (Visual Basic Scripting)
  samples, 93
  scripts, 95
viewing
  information about content, 51, 54
VLOOKUP function (Excel)
  finding records, 80

W
WebSphere
  parser collisions with Report Data Service, 114
widgets
  definition, 148
Windows Event Viewer, 98
workbooks
  opening from IBM Cognos Connection, 26
  options, 32
  publishing to IBM Cognos Connection, 26
  saving, 60
worksheets
  clearing content, 25
  referencing records, 80