

IBM Cognos Analysis for Microsoft Excel  
Version 10.2.0

*Installation Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 43.

**Product Information**

This document applies to IBM Cognos Analysis for Microsoft Excel Version 10.2.0 and may also apply to subsequent releases.

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## Introduction

This document is intended for use with IBM® Cognos® Analysis for Microsoft Excel. IBM Cognos Analysis for Microsoft Excel is a Microsoft Excel-based tool that professional report authors use to build sophisticated, multiple-sheet, multiple-query reports against multiple databases.

### Audience

This guide assumes that you are familiar with IBM Cognos products, such as IBM Cognos Business Intelligence, IBM Cognos for Microsoft Office, and IBM Cognos PowerPlay®. You should also be familiar with the Microsoft Office system, such as Microsoft Excel.

### Finding information

To find IBM Cognos product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers (<http://pic.dhe.ibm.com/infocenter/cogic/v1r0m0/index.jsp>). Release Notes are published directly to Information Centers, and include links to the latest technotes and APARs.

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

### 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.

### Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. IBM Cognos Analysis for Microsoft Excel has accessibility features. For more information, see Appendix A, "Accessibility features," on page 15. IBM Cognos HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

### Samples disclaimer

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

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## Chapter 1. What's new?

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

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 (<http://www.ibm.com/support/docview.wss?uid=swg27038266>).

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### New features in version 10.2.0

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

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

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

- Additional language support

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

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### New features in version 10.1.1

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

#### Enhancements to supported environments and platforms

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

##### Support for 64-bit installation

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

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

- For a 32-bit installation, C:\Program Files\IBM\cognos\Cognos for Microsoft Office

- For a 64-bit installation in 64bit OS, C:\Program Files\IBM\cognos\Cognos for Microsoft Office"
- For a 32-bit installation in 64bit OS, C:\Program Files(X86)\IBM\cognos\Cognos for Microsoft Office"

For information about supported environments and platforms, visit the IBM Cognos Customer Center at <http://www.ibm.com/software/data/cognos/customercenter/> (opens in new window).

## **Support for Microsoft Office 2010**

Version 2010 of the Microsoft Excel software is now supported for IBM Cognos Analysis for Microsoft Excel.

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

To review an up-to-date list of environments supported by IBM Cognos Business Intelligence products, including information on operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the [IBM Cognos Customer Center](#) (opens in new window).

## **Support for Mozilla Firefox**

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

To review an up-to-date list of environments supported by IBM Cognos Business Intelligence products, including information on operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Information Center (<http://www.ibm.com/support/docview.wss?uid=swg27038296>) (opens in new window).

## **Support for Internet Explorer**

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

To review an up-to-date list of environments supported by IBM Cognos Business Intelligence products, including information on operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Information Center (<http://www.ibm.com/support/docview.wss?uid=swg27038296>) (opens in new window).

## **Additional language support**

IBM Cognos Analysis for Microsoft Excel now supports Norwegian.



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## Chapter 2. IBM Cognos Analysis for Microsoft Excel

IBM Cognos Analysis for Microsoft Excel works with secure IBM Cognos Business Intelligence and IBM Cognos TM1<sup>®</sup> content in Microsoft Excel.

Users can build sophisticated multiple-sheet, multiple-query reports in Excel from different kinds of data sources, and analyze and explore 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.

For IBM Cognos BI, this application is used to analyze enterprise data to identify trends, opportunities, problems, or project characteristics. For IBM Cognos TM1, this application is used by financial analysts and planners who plan and measure business and operational data.



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## Chapter 3. Preparing to Install

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

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

- Review the Release Notes.
- Supported environments

After you complete these tasks, continue with Chapter 4, “Installing IBM Cognos Analysis for Microsoft Excel,” on page 7.

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### Review the Release Notes Before You Install

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

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

Review the Release Notes before you install your product. The Release Notes contains late-breaking information about known issues, and documentation updates and deprecation notices. The Release Notes are available from the first page of the installation wizard or from the product disc. Release Notes updates are also available on the IBM Cognos Customer Center (<http://www.ibm.com/software/data/cognos/customercenter/>).

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### Supported Environments

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

To review an up-to-date list of supported environments, visit the IBM Cognos Customer Center (<http://www.ibm.com/support/docview.wss?uid=swg2703826>). The website provides information about requirements related to the following parts of your environment.

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

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

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

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

The IBM virtualization policy ([http://www.ibm.com/software/support/virtualization\\_policy.html](http://www.ibm.com/software/support/virtualization_policy.html)) describes IBM support for virtualization environments.

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## Chapter 4. Installing IBM Cognos Analysis for Microsoft Excel

To use IBM Cognos Analysis for Microsoft Excel, you must install Microsoft .NET Framework 4.0 or later and the IBM Cognos Analysis for Microsoft Excel components.

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

You must first uninstall older versions of IBM Cognos Analysis for Microsoft Excel before you can install the new version.

### Procedure

1. Install Microsoft .NET Framework.  
For more information, see *Installing Microsoft .NET Framework*.
2. Install Primary Interop Assemblies.  
For more information, see *Installing Primary Interop Assemblies*.
3. Uninstall previous versions of IBM Cognos Analysis for Microsoft Excel.  
For more information, see “Uninstalling previous versions of IBM Cognos Analysis for Microsoft Excel” on page 9.
4. Install IBM Cognos Analysis for Microsoft Excel components.  
For more information, see *Installing IBM Cognos Analysis for Microsoft Excel components*.
5. Test IBM Cognos Analysis for Microsoft Excel.  
For more information, see *Testing IBM Cognos Analysis for Microsoft Excel*.

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### Installing Microsoft .NET Framework

IBM Cognos Analysis for Microsoft Excel requires Microsoft .NET Framework version 4.0 or later to be installed on all user computers.

For a list of supported versions of Microsoft .NET Framework, see the IBM Cognos Customer Center (<http://www.ibm.com/support/docview.wss?uid=swg27038266>).

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

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

## Procedure

1. Go to the Microsoft download website.
2. Search for .NET Framework 4.0 or later, select the redistributable package, and follow the instructions to download it.
3. Check for other security updates that relate to your version of .NET Framework and download them.

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## Primary interop assemblies (PIAs) for Microsoft Excel

To use the features of IBM Cognos Analysis for Microsoft Excel, you must have installed the primary interop assemblies (PIAs) for Excel. Typically, the PIAs are installed automatically when you install Microsoft Office on the computer. However, in some cases you might need to install the PIAs separately.

Computer workstations must have the PIAs installed and registered in the global assembly cache to run Office solutions that target the .NET Framework 4.0 or later.

You can install the complete set of PIAs in the global assembly cache in two ways:

- Modify the Microsoft Office setup.  
If you did not install .NET Framework before you installed the Office system, the PIAs are not installed with your Office installation. If you installed .NET Framework after you installed the Office system, you can install the PIAs by modifying the Office setup.
- Install them from the redistributable PIA package.

The Microsoft Office PIAs are installed in the global assembly cache in *drive:/WINDOWS/assembly* or *drive:/WINNT/assembly*.

## Modifying the Microsoft Office setup to install primary interop assemblies for Excel

To use the features of IBM Cognos Analysis for Microsoft Excel, you must have installed the primary interop assemblies (PIAs) for Excel. Typically, the PIAs are installed automatically when you install Microsoft Office on the computer. However, in some cases you might need to install the PIAs separately.

Computer workstations must have the PIAs installed and registered in the global assembly cache to run Office solutions that target the .NET Framework 4.0 or later. However, the Office PIAs are not required on computers to run Office solutions that target the .NET Framework 4.

If you did not install .NET Framework before you installed the Office system, the PIAs are not installed with your Office installation. If you installed .NET Framework after you installed the Office system, you can install the PIAs by modifying the Office setup.

The Microsoft Office PIAs are installed in the global assembly cache in *drive:/WINDOWS/assembly* or *drive:/WINNT/assembly*.

## Before you begin

You must be an administrator on the computer to install the .NET Framework and the Microsoft Office PIAs.

## Procedure

1. From the **Start** menu, click **Control Panel**, and then double-click **Add or Remove Programs**.
2. In the list of programs, click the Microsoft Office version, and then click **Change**.
3. In the **Microsoft Office Setup** wizard, in the **Maintenance Mode Options** page, select **Add or Remove Features**.
4. In the **Custom Setup** page, select the **Excel** option and the **Choose advanced customization of applications** check box, and then click **Next**.
5. In the **Advanced Customization** page, expand **Microsoft Office**, and the **Microsoft Office Excel** node.
6. Click the symbol next to the **.Net Programmability Support** feature, and then click **Run from my computer**.  
The feature will be installed and stored on your hard disk.
7. Click **Update**.

## Installing primary interop assemblies from the redistributable package for Microsoft Excel

To use the features of IBM Cognos Analysis for Microsoft Excel, you must have installed the primary interop assemblies (PIAs) for Excel. Typically, the PIAs are installed automatically when you install Microsoft Office on the computer. However, in some cases you might need to install the PIAs separately. If you did not install .NET Framework before you installed the Office system, the PIAs are not installed with your Office installation. You can install them from the redistributable PIA package.

Computer workstations must have the PIAs installed and registered in the global assembly cache to run Office solutions that target the .NET Framework 4.0 or later. However, the Office PIAs are not required on computers to run Office solutions that target the .NET Framework 4.

The Microsoft Office PIAs are installed in the global assembly cache in *drive:/WINDOWS/assembly* or *drive:/WINNT/assembly*.

### Before you begin

You must be an administrator on the computer to install the .NET Framework and the Microsoft Office PIAs.

### Procedure

1. Ensure that the .NET Framework 4.0 is installed.
2. Go to the Microsoft download website.
3. Follow the instructions in the download page to install the primary interop assemblies.

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## Uninstalling previous versions of IBM Cognos Analysis for Microsoft Excel

If you have a previous version of IBM Cognos Analysis for Microsoft Excel, you must uninstall it before you can install the new version of IBM Cognos Analysis for Microsoft Excel.

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

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

## Before you begin

Before uninstalling, close all Microsoft Office applications.

## Procedure

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

The **Uninstall** wizard appears.

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

2. Follow the instructions to uninstall the component.

The `cognos_uninst_log.txt` file records the activities that the Uninstall wizard performs while uninstalling files.

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

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## Installing IBM Cognos Analysis for Microsoft Excel

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

Application samples for IBM Cognos Analysis for Microsoft Excel are on a separate disc. If you want to use the samples, your IBM Cognos Business Intelligence administrator must install them from the IBM Cognos BI Samples disc.

## Before you begin

IBM Cognos Analysis for Microsoft Excel is available as a 32-bit or 64-bit installation. The corresponding installation must be installed on either a 32-bit or 64-bit Windows computer.

Before you update and install components, ensure that the following statements are true:

- You have administrative privileges on the computer.
- Microsoft .NET Framework 4.0 or later is installed.
- You have uninstalled any previous version of IBM Cognos Analysis for Microsoft Excel.
- You have the appropriate license to use your IBM Cognos for Microsoft Office product.

## Procedure

1. Insert the IBM Cognos Analysis for Microsoft Excel CD or go to the location where the installation files were downloaded. The **Welcome** page appears in a new window.



2. If no **Welcome** page appears or you are not installing from the CD, depending on your operating system and version of Microsoft Excel, choose whether to install the 32-bit or 64-bit version.
  - To install the 32-bit version, go to the win32 directory and double-click issetup.exe.
  - To install the 64-bit version, go to the winx64h directory and double-click issetup.exe.
3. Select the language to use for the installation.

The language that you select determines the language of the user interface. You can change the language to any of the installed languages after installation.
4. In the **Component Selection** page, select IBM Cognos Analysis for Microsoft Excel.
5. Follow the directions in the installation wizard to copy the required files to your computer.

## Results

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

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## Enabling the Proper Display of Chinese Characters

Simplified Chinese characters may not display properly in the IBM Cognos Office applications. To properly display Simplified Chinese characters, you must perform the following tasks:

- “Install GB18030 Support on a Microsoft Windows XP Client”
- “Enable GB18030 Font Linking” on page 12

### Install GB18030 Support on a Microsoft Windows XP Client

If your locale is Simplified Chinese, ensure that the appropriate language support is installed so that the IBM Cognos for Microsoft Office applications can display the menus and dialog boxes correctly.

GB18030 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, such as Tahoma, Arial, and Microsoft Sans Serif. The GB18030 Support Package contains SimSun18030.ttc, a TrueType font collection file that combines two Chinese fonts, SimSun-18030 and NSimSun-18030.

You can install the language support for Simplified Chinese on any non-Simplified Chinese version of Windows. Perform the following procedure on a computer with Windows XP installed.

#### Procedure

1. From the **Start** menu, click **Control Panel**, and then double-click **Regional and Language Options**.
2. On the **Languages** tab, select the **Install files for East Asian languages** check box.
3. Install the GB18030 support package as a download from Microsoft.

## Enable GB18030 Font Linking

To properly display GB18030 characters in IBM Cognos for Microsoft Office applications, you must ensure that certain settings are correct.

You must ensure that

- the language for non-Unicode programs is set to **China - PRC** in the **Regional Settings and Language Options** dialog box (**Control Panel, Regional Settings and Language Options, Advanced** tab)
- the FontLink registry entry contains SimSun-18030 in each active system font face name

Font linking allows you to render non-Latin characters when the font set by the application does not support those characters. It is used when an application cannot use a single font to render all the characters required. You can link one or more fonts, called linked fonts, to another font, called the base font.

After you link fonts, you can use the base font to display characters that do not exist in the base font, but that do exist in one of the linked fonts. For example, linking a Han font to a Tahoma font allows you to display the Chinese characters in a Tahoma font.

**Important:** Incorrectly editing the registry can cause serious problems that may require you to reinstall your operating system. You may not be able to resolve problems resulting from editing the registry. Before editing the registry, back up any valued data on the computer.

### Procedure

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\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows NT\CurrentVersion\FontLink\SystemLink
4. In the **Name** list, right-click the **Tahoma** font that you want to link to, and then click **Modify**.
5. In the **Edit Multi-String** dialog box, on a new line, add the following:  
SimSun18030.ttc,SimSun-18030
6. Click **OK**.
7. Repeat steps 4 to 6 for the Microsoft Sans Serif, Arial, and SimSun fonts that reference SimSun.
8. Click **OK** to restart the computer.

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## Testing IBM Cognos Analysis for Microsoft Excel

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

### Before you begin

For full access to IBM Cognos Analysis for Microsoft Excel, you should be a member of the Express Authors or Report Administrators role in IBM Cognos Business Intelligence. An administrator must configure these privileges using IBM Cognos Administration.

## Procedure

1. Start Microsoft Excel or open a Microsoft Excel spreadsheet.
2. Confirm that **IBM Cognos** appears in the toolbar.  
If **IBM Cognos** is not in the toolbar, from the **View** menu, click **Toolbars, IBM Cognos for Microsoft Office**.
3. To show the action pane, click **IBM Cognos** in the toolbar.  
The **Welcome** pane appears. It includes a link to IBM Cognos Analysis for Microsoft Excel.
4. Click **IBM Cognos Analysis for Microsoft Excel** in the action pane.  
The heading of the action pane changes to **IBM Cognos Analysis**. You can switch between action panes by clicking the icons on the action pane.



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## Appendix A. Accessibility features

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

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### Accessibility features for the Installation wizard

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

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

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

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### Keyboard navigation in the Installation wizard

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

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

*Table 1. Installation wizard keyboard shortcuts*

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

Table 1. Installation wizard keyboard shortcuts (continued)

Goal	Action
Perform the action for the selected button, or select or clear the selected check box.	SPACEBAR

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

Table 2. License Agreement keyboard shortcuts

Goal	Action
Accept the license agreement.	ALT+A
Decline the license agreement.	ALT+D
Close the Installation wizard when the license agreement has been declined.	ALT+X

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## Vendor software

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

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## IBM and accessibility

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

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

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## Appendix B. Troubleshooting

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

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### Troubleshooting a problem

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

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

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

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

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

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

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

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

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

The following questions help you to isolate the problem layer:

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

If one layer reports the problem, the problem does not necessarily originate in that layer. Part of identifying where a problem originates is understanding the

environment in which it exists. Take some time to completely describe the problem environment, including the operating system and version, all corresponding software and versions, and the hardware. Confirm that you are running within an environment that is supported; many problems can be traced back to incompatible levels of software that are not intended to run together or have not been fully tested together.

### **When does the problem occur?**

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

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

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

### **Under which conditions does the problem occur?**

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

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

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

### **Can the problem be reproduced?**

Problems that you can reproduce are often easier to solve. However, problems that you can reproduce can have a disadvantage. If the problem has a significant business impact, you do not want it to recur. If possible, re-create the problem in a test or development environment, which typically offers you more flexibility and control during your investigation. Answer the following questions:

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

“Searching knowledge bases” on page 19

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



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## Searching knowledge bases

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

### About this task

You can find useful information by searching the information center for IBM Cognos, but sometimes you need to look beyond the information center to resolve problems.

### Procedure

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

- Find the content that you need by using the IBM Support Portal (IBM Cognos Business Intelligence Support Portal) (opens in new window).  
The IBM Support Portal is a unified, centralized view of all technical support tools and information for all IBM systems, software, and services. The IBM Support Portal lets you access the IBM electronic support portfolio from one place. You can tailor the pages to focus on the information and resources that you need for problem prevention and faster problem resolution. Familiarize yourself with the IBM Support Portal by viewing the demo videos ([https://www.ibm.com/blogs/SPNA/entry/the\\_ibm\\_support\\_portal\\_videos](https://www.ibm.com/blogs/SPNA/entry/the_ibm_support_portal_videos)) (opens in new window) about this tool. These videos introduce you to the IBM Support Portal, explore troubleshooting and other resources, and demonstrate how you can tailor the page by moving, adding, and deleting portlets.
- Search for content about IBM Cognos by using one of the following additional technical resources:
  - IBM Cognos BI APARs (problem reports) (opens in new window)
  - IBM Cognos BI Support website (opens in new window).
  - IBM Cognos forums and communities (opens in new window).
- Search for content by using the IBM masthead search. You can use the IBM masthead search by typing your search string into the Search field on any [ibm.com](#)<sup>®</sup> page.
- Search for content by using any external search engine, such as Google, Yahoo, or Bing. If you use an external search engine, your results are more likely to include information that is beyond the [ibm.com](#) domain. However, sometimes you can find useful problem-solving information about IBM products in newsgroups, forums, and blogs that are not on [ibm.com](#).

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

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## Getting fixes

A product fix might be available to resolve your problem.

### Procedure

To find and install fixes:

1. Determine which fix you need (Fix Central) (opens in new window) (<http://www.ibm.com/support/fixcentral/>)

2. Download the fix. Open the download document and follow the link in the “Download package” section.
3. Apply the fix by following the instructions in the “Installation Instructions” section of the download document.
4. Subscribe to receive weekly email notifications about fixes and other IBM Support information.

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## Contacting IBM Support

IBM Support provides access to a variety of IBM resources for help with software questions.

### Before you begin

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

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

For information about the types of available support, see the Support portfolio topic in the *Software Support Handbook* (opens in new window).

### Procedure

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

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

## Results

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

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## Exchanging information with IBM

To diagnose or identify a problem, you might need to provide IBM Support with data and information from your system.

In other cases, IBM Support might provide you with tools or utilities to use for problem determination.

### Sending information to IBM Support

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

#### Procedure

To submit diagnostic information to IBM Support:

1. Open a problem management record (PMR). You can use the IBM Support Assistant (opens in new window) or the IBM Service Request tool (opens in new window).
2. Collect the diagnostic data that you need. Diagnostic data helps reduce the time that it takes to resolve your PMR. You can collect the diagnostic data manually or automatically.
3. Compress the files by using the TRSMMAIN or AMATERSE program. Download the free utility from the IBM to the IBM Cognos BI system and then install the utility using the TSO RECEIVE command.
4. Transfer the files to IBM. You can use one of the following methods to transfer the files to IBM:
  - The Service Request tool (opens in new window)
  - Standard data upload methods: FTP, HTTP
  - Secure data upload methods: FTPS, SFTP, HTTPS
  - Email

If you are using an IBM Cognos product and you use ServiceLink / IBMLink to submit PMRs, you can send diagnostic data to IBM Support in an email or by using FTP.

All of these data exchange methods are explained on the IBM Support site (opens in new window).

### Receiving information from IBM Support

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

## Before you begin

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

## Procedure

To download files from IBM Support:

1. Use FTP to connect to the site that your IBM technical-support representative provided and log in as anonymous. Use your email address as the password.
2. Change to the appropriate directory:
  - a. Change to the `/fromibm` directory.  
`cd fromibm`
  - b. Change to the directory that your IBM technical-support representative provided.  
`cd nameofdirectory`
3. Enable binary mode for your session.  
`binary`
4. Use the **get** command to download the file that your IBM technical-support representative specified.  
`get filename.extension`
5. End your FTP session.  
`quit`

---

## Subscribing to Support updates

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

### About this task

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

#### RSS feeds and social media subscriptions

The following RSS feeds and social media subscriptions are available for IBM Cognos BI:

- RSS feed for a developerWorks® forum (opens in new window).
- Subscription to Cognos Support notebook blog (opens in new window)
- RSS feed for the Support site for IBM Cognos Business Intelligence (opens in new window)

For general information about RSS, including steps for getting started and a list of RSS-enabled IBM web pages, visit the IBM Software Support RSS feeds (opens in new window) site.

#### My Notifications

With My Notifications, you can subscribe to Support updates for any IBM product. You can specify that you want to receive daily or weekly email announcements. You can specify what type of information you want to receive, such as publications, hints and tips, product flashes (also known as alerts), downloads, and drivers. My Notifications enables you to customize

and categorize the products that you want to be informed about and the delivery methods that best suit your needs.

## Procedure

To subscribe to Support updates:

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

## Results

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

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## 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 Business Intelligence products, refer to the IBM Cognos Business Intelligence *Administration and Security Guide*.

## Configuration Issues

These issues are related to configuration and setup.

### Convert to Formulas does not show value

You can create a crosstab without experiencing an error, but when you convert that exploration sheet to formulas, cells no longer display values properly. In one of the cells that has no value, you click the cell and it shows the COGVAL formula, such as =COGVAL(\$C\$1, \$C\$2, \$B10, C\$8, \$B\$8). Attempting to do this on another

workstation you find that values are displayed correctly. If a user with administrative rights to the workstation attempts to convert to formulas, the values are displayed correctly in the cells of the worksheet.

The user did not use Microsoft Excel before IBM Cognos Analysis for Microsoft Excel was installed and did not get registered properly. There are two ways to resolve this problem. You can give the affected user local administration rights to the workstation or you can run the file **Register Cognos UDF.vbs**, which will add the proper registry entries for the new user.

For the **Register Cognos UDF.vbs** file process to work (both during the installation of the software or when run separately to add a new user) the Microsoft Excel registry entries must have been created by Microsoft Excel itself. You must ensure that the user run Microsoft Excel first, before attempting to add registry entries for IBM Cognos Analysis for Microsoft Excel. You can examine the `ntuser.dat` that the script writes to check whether the user has been properly added.

### **Updating server and package designations to make a server available**

After changing the gateway alias or switching from a test to a production environment you receive the following error message advising you that the server is not available and that the Cognos gateway is unable to connect to the Business Intelligence server.

`SERVER_NOT_AVAILABLE`: The Cognos gateway is unable to connect to the BI server. The server may be unavailable or the gateway may not be correctly configured.

This is probably caused by a change in the gateway URI.

Update the server and package designation in a workbook to switch from a test to a production environment or to access information from a different set of financial data, such as a submission.

#### **Procedure**

1. Optionally, you can update information in cell references.
  - From the worksheet you want to update, open the new server and package.
  - From the Information folder, drag the updated server and package metadata to the server or package cell.
2. Optionally, you can update information in embedded text.
  - Use the Microsoft Excel search and replace function to update embedded references in the text of cell formulas.

### **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 4.0 or later. Another possible reason for this condition is that the IBM Cognos Office COM add-in is either not installed or not registered.

To install the IBM Cognos Office COM add-in, run the `.msi` program that is found on the installation CD.

Before you attempt to install Microsoft .NET Programmability Support, you must have installed Microsoft .NET Framework version 4.0 or later.

## IBM Cognos Office Fails to Initialize in Microsoft Internet Explorer

If you use Microsoft 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.

If you use Windows 7, see the Microsoft web site for information to configure Internet Explorer to open Microsoft Office files in Microsoft Office instead of in Internet Explorer. If you use Windows XP, use the following procedure to change the way files open.

### Procedure

1. In Windows XP, 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.

## 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 Microsoft Windows Explorer, the file association is either corrupted or not installed properly.

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

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

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

### About this task

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

**Note:** If you are using the command line on version 7 of Microsoft Windows operating system, you must elevate the rights of the command line to perform certain tasks, such as reregistering file types. To open an elevated command prompt, or a command prompt in Administrator mode, right-click the command prompt shortcut, and select **Run as Administrator**.

### Procedure

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



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

### **Unable to Open Published Microsoft Office Documents from IBM Cognos Connection when running the Microsoft XP operating system**

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

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

#### **Confirming Opening of Documents:**

The procedure to confirm opening of documents is as follows.

##### **Procedure**

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

#### **Resetting Internet Security Options:**

The procedure to reset internet security options is as follows.

##### **Procedure**

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

### **Error Messages, the .NET shortcut, or the .NET Console Are Not in the Language of the .NET Framework 4.0 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. For example, English, French, German, and Japanese are listed here: 1033=en-en, 1036=fr-fr, 1031=de-de, and 1041=ja. Refer to the Microsoft Support Site to obtain subkey numbers for other languages.

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

### **Workbook Closes Unexpectedly**

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

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

### **Reports Unavailable in 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.

### **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". If you use version 7 of Microsoft Windows operating system, you must use Run in XP from the command prompt to reregister file types.

### **Procedure**

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 topic area, right-click the **OPEN** entry, 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.

### Improve performance for IBM Cognos TM1 data

If you experience unacceptable performance when you work with Cognos TM1 data, the administrator of the Cognos TM1 system might be able to change cube or system settings to improve performance.

To help the Cognos TM1 administrator evaluate the performance issue, provide the administrator with the details of the data you are using and a description of actions that result in unacceptable performance.

The following are examples of Cognos TM1 settings that affect performance.

#### VVM (}CubeProperties)

For each cube, this property determines the amount of RAM reserved on the server for the storage of stargate views. The more memory made available for stargate views, the better performance will be. Sufficient memory must be available for the Cognos TM1 server to load all cubes.

#### VMT (}CubeProperties)

If the time required to calculate a cube view surpasses the specified threshold, TM1 attempts to store a stargate view. If there is not enough memory available to store the stargate view, TM1 purges the oldest stargate view that is not currently in use, and continues to purge views in this manner until sufficient memory is made available.

The *IBM Cognos TM1 Operation Guide* includes more information about the CubeProperties and other tuning options.

### Lists that were created using IBM Cognos Analysis for Microsoft Excel Version 8.4 return an error

Selecting Run with All Data or Refresh All Data on a workbook created in IBM Cognos Analysis for Microsoft Excel Version 8.4 may display an error.

#### Procedure

Use the Excel Clear All feature to remove all data and formatting from cells before clicking **Refresh All Data** from the IBM Cognos toolbar.

### RSV-SRV-0067 This report contains upgrade errors and cannot run

Adding a calculation to a workbook created in IBM Cognos Analysis for Microsoft Excel Version 8.4 displays an upgrade warning error.

#### Procedure

Use the Excel Clear All feature to remove all data and formatting from cells before clicking Refresh All Data from the IBM Cognos toolbar.

### DPR-ERR-2079 Firewall Security Rejection

If you run a report after your session has expired and then try to navigate away from the first page of the report, you encounter an error.

DPR-ERR-2079 Firewall Security Rejection. Your request was rejected by the security firewall. CAF rejection details are available in the log. Please contact your administrator.

When the DPR-ERR-2079 error occurs after an expired session, you must log on again to resolve the problem.

### **Procedure**

1. In the report list, right-click the node item, which appears before other items.
2. Click **Log On**.
3. Provide your authentication credentials as prompted and click **OK**.

### **Item cannot be expanded**

Microsoft Excel has reached the maximum number of rows or columns for this worksheet. The number of rows and columns is limited in Microsoft Excel. Expanding the current item is not possible because it would shift rows or columns beyond this worksheet limit. Microsoft 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 crosstab, list, or analysis to another worksheet. Or, you can move the data to a new location and try again.

### **Results have exceeded the Excel row or column limit**

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. Items are truncated.

Filter items so that the row or column items can be displayed without reaching the limit. Consider creating additional crosstab or list exploration sheets to spread the data over more than one worksheet. Consider using a new version of Microsoft Excel that has larger limits for rows and columns.

### **Error: Exception from HRESULT:<location>**

In IBM Cognos Analysis for Microsoft Excel if you import a data item where the path to the data item exceeds 256 characters it results in the error: Exception from HRESULT.

You must create package names and unique data identifiers that keep to the 256-character limit inside Microsoft Excel.

### **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 XP or Office 2003, 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 workbook with the .xlsx extension. Opening the workbook that contains the exploration in Office 2007 or 2010 does not convert it to Office 2007 or 2010 format. Saving the workbook with the .xlsx extension converts the workbook to the Office 2007 or 2010 format that supports columns exceeding the 256 column limit set in earlier versions of Excel.

## 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.

#### Procedure

1. Retrieve the CA certificate from the issuing authority.  
The file has a .cer extension. This is not the same certificate as the one used by the Web server. It is the certificate for the issuing authority itself.
2. Double-click the .cer file, click **Install Certificate**, and then click **Next**.
3. Click **Place all certificates in the following store**.
4. Click **Browse**, click **Trusted Root Certification Authorities**, and then click **Next**.
5. Click **Finish**.

### Unable to View Reports After Clicking View Report

IBM Cognos for Microsoft Office is functioning normally, but you cannot use the View Report option to view reports. The client machine, running IBM Cognos for Microsoft Office, cannot connect to the gateway URL as configured in IBM Cognos 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.

**COI-ERR-2005 This version of Microsoft Office is not supported**  
IBM Cognos Office supports only specific versions of Microsoft Office applications.

Load the report content into one of the supported applications and environments.

To review an up-to-date list of environments supported by IBM Cognos products, including operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Customer Center (<http://www.ibm.com/support/docview.wss?uid=swg27038266>).

**COI-ERR-2006 This Microsoft Office product is not supported**

IBM Cognos Office supports only specific Microsoft Office applications, such as Microsoft Office Excel, Microsoft Office Word, and Microsoft Office PowerPoint. You cannot load IBM Cognos Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

To review an up-to-date list of environments supported by IBM Cognos products, including operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Customer Center (<http://www.ibm.com/support/docview.wss?uid=swg27038266>).

**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-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 (<http://pic.dhe.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 Office Connection directory, such as C:\Documents and Settings\*user name*\Local Settings\Application Data\Cognos\Office Connection or C:\Users\*user name*\AppData\Local\Cognos\Office Connection.

Turn compression off if you need to run tests or perform troubleshooting.

To turn gzip compression off set the following attribute:

```
<setting name="UseGzipCompression">False</setting>
```

### **COI-ERR-2016 Worksheet protected, IBM Cognos styles cannot be populated**

If the worksheet is protected, the IBM Cognos styles cannot be applied.

You must unprotect the worksheet for the styles to be applied during a refresh of the data.

## **IBM Cognos Analysis for Microsoft Excel numbered error messages**

The following error messages may appear in a dialog box and are recorded in the IBM Cognos Office log.

### **COR-ERR-2004 Axis specification is not valid**

The workbook specification is not capable of being generated because of an anomaly.

To fix the problem, you may attempt to do any of the following:

- Click **Undo**.
- Click **Clear All Data**.
- Close the workbook and open it again.

The workbook should now accept data from the source tree.

### **COR-ERR-2007 Error retrieving from resources. Tried '{0}'**

The exploration sheet experienced a bad state.

Contact IBM Cognos Resource Center.

### **COR-ERR-2009 Name formula is not valid**

The COGNAME formula did not parse correctly. It may have been altered manually and may have a missing argument.

Check the COGNAME formula in the active cell and ensure that it is in the correct format, or optionally, insert the member from the source tree.

### **COR-ERR-2010 Formula is not valid**

If an argument to a COGNAME or COGVAL formula references a cell and that cell does not contain the expected string formula you receive this error.

Check the cell and its dependents. Look for #REF or #VALUE in the cell. The contents of the cell may have accidentally been deleted.

### **COR-ERR-2011 Invalid range: Please enter a valid range for crosstab or list**

The range is not valid or is outside of the range of the data type.

To avoid this limitation, limit your data selections.

### **COR-ERR-2013 Exploration cannot be converted to formula based because at least one context item contains a selection**

With more than one item in the Context drop zone there is no way for the multiple items to be rendered into the cells of the worksheet.

Remove one dimension from the Context drop zone. You must have one item per dimension to convert to a formula-based analysis.

### **COR-ERR-2014 Due to Excel worksheet limitations the results may be truncated**

If the data that you receive back has more than 250 columns or more than 65,500 rows and you are not using Microsoft Excel 2007 or 2010, the result is truncated. You receive this message to make you aware of the truncation.

To avoid this limitation, limit your data selections.



**COR-ERR-2015 The current exploration cannot be rendered at this location on the worksheet**

The exploration cannot write data outside the limits of the current worksheet. Either the exploration is too large for Microsoft Excel or you have designated a starting location too close to the limit.

Try to move your start location. If that fails to fix the problem, try creating a crosstab with fewer rows or columns.

**COR-ERR-2016 Unable to retrieve package <Name>**

After you selected a package using the **Open Package** dialog box, an error occurred when trying to download the package from the server.

This is an internal error. You must contact Cognos Software Services.

**COR-ERR-2017 The current selection did not return any data**

Your selections in the source tree did not result in any data. The exploration sheet is cleared or returned to the previous state.

To display items in the worksheet, you must select objects from the source tree that intersect on data points.

**COR-ERR-2018 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. You can also copy the .pdf file from the IBM Cognos Customer Service Center (<http://www.ibm.com/support/entry/portal/overview>) to the documentation directory.



---

## 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 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 readable and maintainable.

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

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

*Table 3. IBM Cognos Office resource files*

<b>Language</b>	<b>IBM Cognos Analysis for Microsoft Excel files (internal name cor)</b>	<b>IBM Cognos for Microsoft Office files (internal name coc)</b>	<b>IBM Cognos Office files (internal name coi)</b>
Language Neutral	cormsgs.resx	cocmsgs.resx	coimsgs.resx
Chinese (simplified)	cormsgs.zh-cn.resx	cocmsgs.zh-cn.resx	coimsgs.zh-cn.resx
Chinese (traditional)	cormsgs.zh-tw.resx	cocmsgs.zh-tw.resx	coimsgs.zh-tw.resx
Croatian	cormsgs.hr.resx	cocmsgs.hr.resx	coimsgs.hr.resx
Czech	cormsgs.cs.resx	cocmsgs.cs.resx	coimsgs.cs.resx
Danish	cormsgs.da.resx	cocmsgs.da.resx	coimsgs.da.resx
Dutch	cormsgs.nl.resx	cocmsgs.nl.resx	coimsgs.nl.resx
English	cormsgs.en.resx	cocmsgs.en.resx	coimsgs.en.resx

Table 3. IBM Cognos Office resource files (continued)

Language	IBM Cognos Analysis for Microsoft Excel files (internal name cor)	IBM Cognos for Microsoft Office files (internal name coc)	IBM Cognos Office files (internal name coi)
Finnish	cormsgs.fi.resx	cocmsgsf.fi.resx	coimsgsf.fi.resx
French	cormsgs.fr.resx	cocmsgsf.fr.resx	coimsgsf.fr.resx
German	cormsgs.de.resx	cocmsgsf.de.resx	coimsgsf.de.resx
Hungarian	cormsgs.hu.resx	cocmsgsf.hu.resx	coimsgsf.hu.resx
Italian	cormsgs.it.resx	cocmsgsf.it.resx	coimsgsf.it.resx
Japanese	cormsgs.ja.resx	cocmsgsf.ja.resx	coimsgsf.ja.resx
Kazakh	cormsgs.kk.resx	cocmsgsf.kk.resx	coimsgsf.kk.resx
Korean	cormsgs.ko.resx	cocmsgsf.ko.resx	coimsgsf.ko.resx
Norwegian	cormsgs.no.resx	cocmsgsf.no.resx	coimsgsf.no.resx
Polish	cormsgs.pl.resx	cocmsgsf.pl.resx	coimsgsf.pl.resx
Portuguese	cormsgs.pt.resx	cocmsgsf.pt.resx	coimsgsf.pt.resx
Romanian	cormsgs.ro.resx	cocmsgsf.ro.resx	coimsgsf.ro.resx
Russian	cormsgs.ru.resx	cocmsgsf.ru.resx	coimsgsf.ru.resx
Slovenian	cormsgs.sl.resx	cocmsgsf.sl.resx	coimsgsf.sl.resx
Spanish	cormsgs.es.resx	cocmsgsf.es.resx	coimsgsf.es.resx
Swedish	cormsgs.sv.resx	cocmsgsf.sv.resx	coimsgsf.sv.resx
Thai	cormsgs.th.resx	cocmsgsf.th.resx	coimsgsf.th.resx
Turkish	cormsgs.tr.resx	cocmsgsf.tr.resx	coimsgsf.tr.resx

## 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.
- Download and then run the Resource File Generator (`Resgen.exe`) required for compiling the updated resource files.
- Test your work.

## Edit the Resource (.resx) Files

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

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

*componentcodemsgs.languagecode.resx*

You can change strings, not icon or graphic resources.

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

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

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

### Procedure

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

This gives you access to the resource files.

2. Locate the resource files.

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

*installation directory*: \Program Files\IBM\cognos\Cognos for Microsoft Office\resources

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

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

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

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

## Results

The updated resource files are now ready to be compiled.

## 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.

## Procedure

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

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

4. To compile the resource files, from the command prompt, type  
`Resgen /compile "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.

---

## Appendix D. Setting Up an Unattended Installation

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

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

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

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

For more information, see Chapter 4, “Installing IBM Cognos Analysis for Microsoft Excel,” on page 7.

To set up an unattended installation and configuration:

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

---

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

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

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

#### Procedure

1. Use the installation wizard to install the IBM Cognos Office component, such as IBM Cognos Analysis for Microsoft Excel or IBM Cognos for Microsoft Office, on your computer.
2. Go to *c10Office\_location/instlog*.
3. Locate the transfer specification file (.ats) that was generated:
  - If you installed IBM Cognos for Microsoft Office, the file name is *ts-COC-version-yyyymmdd\_hhmm.ats*.

- If you installed IBM Cognos Analysis for Microsoft Excel, the file name is `ts-COR-version-yyyyymmdd_hhmm.ats`.
4. Copy the transfer specification file to the computer where you plan to install the IBM Cognos Office component.
  5. On the computer where you plan to install the software, insert the appropriate CD and copy the contents of the CD to your computer.
  6. In a text editor, open the transfer specification file (.ats) that you copied.
  7. In the section named License Agreement, change the **I AGREE=** property to `y`. This action means that you are accepting the license agreement. To read the terms of the license agreement, see the `LA_language_code` and `notices` files in either of these locations:
    - on the product disk - in the root installation directory for the operating system
    - on the computer from which you copied the response.ats file - in the `c10_location\license\product` directory
  8. Save the transfer specification file in the directory where you copied the contents of the installation CD, and in the same folder that contains the installer executable file, `issetup.exe`.
  9. Open a **Command Prompt** window, and then change to the directory in which the installer, `issetup.exe`, is located.
  10. Type the following command, where `location` is the file path location of the transfer specification file:

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

The progress of the installation appears in the Windows taskbar.

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

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

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

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

---

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

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

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

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

## Procedure

1. On the target computer, insert the CD and copy the contents to the computer.
2. In a text editor, go to the operating system directory in the file structure that you copied and open the response.ats file.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

The progress of the installation appears in the Windows taskbar.

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

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

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

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





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