TM1 Technical Bulletin

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Using TM1 Web in Microsoft Outlook
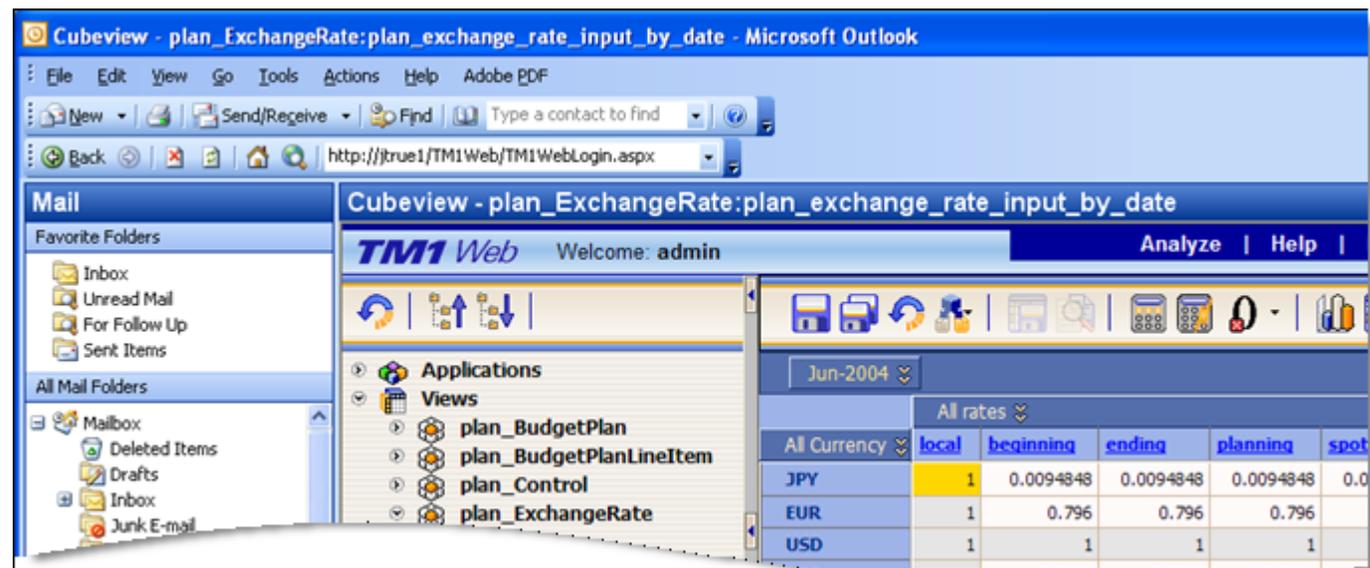
Date: January 14, 2008

Relevant TM1 Versions: TM1 9.1 and later

This technical bulletin describes how to configure, display and use Cognos TM1 Web within Microsoft Outlook.

Overview

You can use the web browser and home page features in Microsoft Outlook to view and use TM1 Web similar to using a standard web browser.

The web features in Microsoft Outlook provide quick access to your TM1 data. You can integrate TM1 Web into a single application with your e-mail and calendar tools so you don't have to switch between two separate applications.

Using these features in Microsoft Outlook, you can:

- Display any TM1 Web page, including the TM1 Web login page, cube views and Websheets.

- Configure a home page for an Outlook folder that displays TM1 Web content whenever you click on the folder.

- Display custom dashboards that include TM1 data using the TM1 Web URL Application Programming Interface (API).
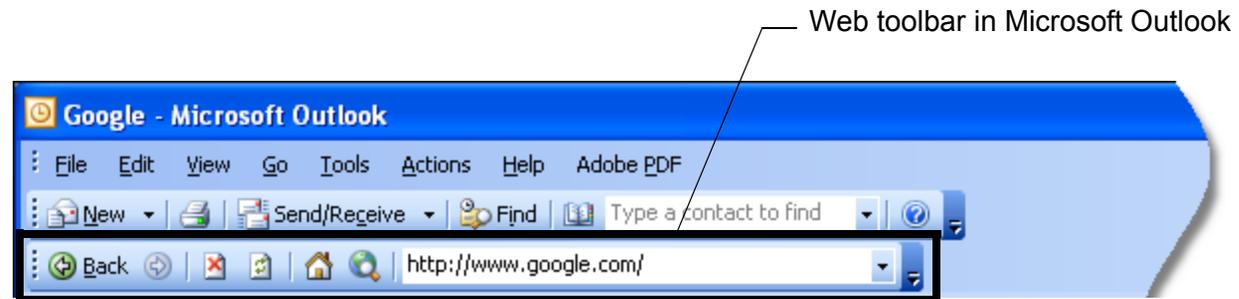
Examples of Using TM1 Web in Microsoft Outlook

Some examples of using TM1 Web and Microsoft Outlook together as a single application solution include:
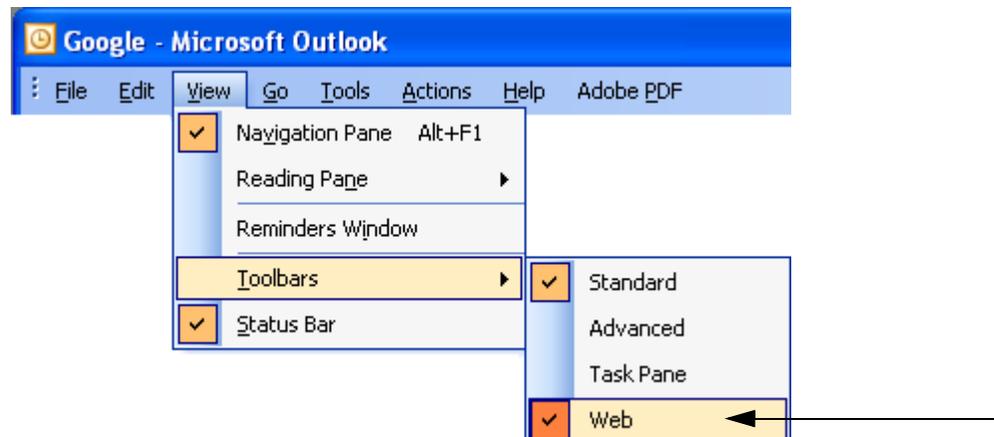
- Example 1: You could display a TM1 Websheet in Microsoft Outlook that reports budget planning data with business units, cost centers and associated e-mail addresses. In one application, you could view the TM1 data and click the e-mail addresses directly in the Websheet to communicate with the different business units.

- Example 2: A TM1 administrator might use Microsoft Outlook to keep easy access to TM1-related tasks that need to be performed frequently. For example, this solution could use a TM1 Websheet that includes a TM1 Action button configured to run a TurboIntegrator process. The Websheet could be assigned as the home page for an Outlook folder, allowing the TM1 administrator to quickly display the Websheet and launch the TI process when needed.

Using Microsoft Outlook as a Web Browser

Microsoft Outlook includes a Web toolbar for entering URLs and navigating web pages.

Web toolbar in Microsoft Outlook

To use Microsoft Outlook as a web browser, turn on the Web toolbar by selecting View > Toolbars > Web.
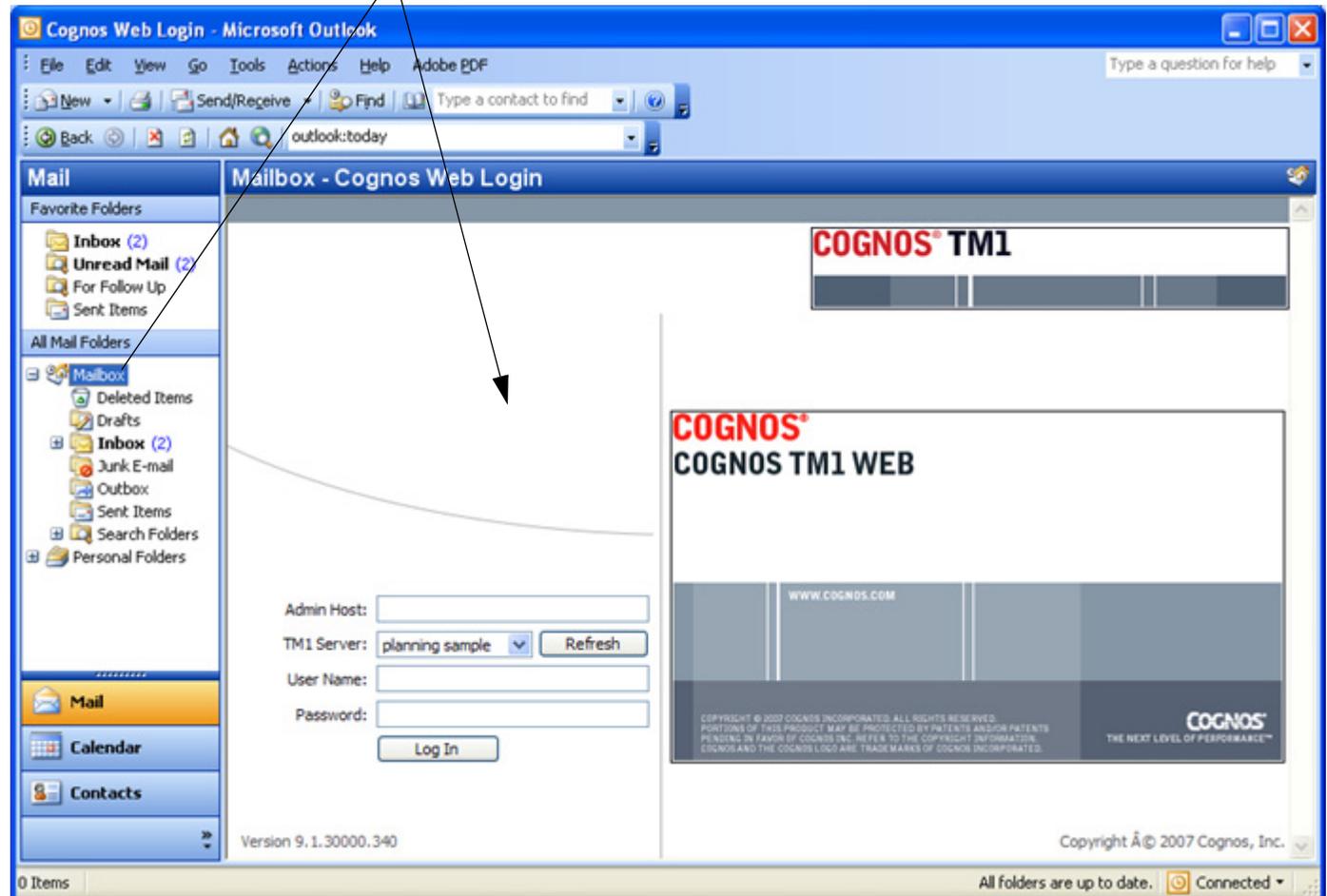

Using Home Pages in Microsoft Outlook

You can use the Outlook home page option to assign a URL as the default home page for an Outlook folder.

For example, the following figure shows the TM1 Web login page assigned as the default home page when you click on the Mailbox folder.

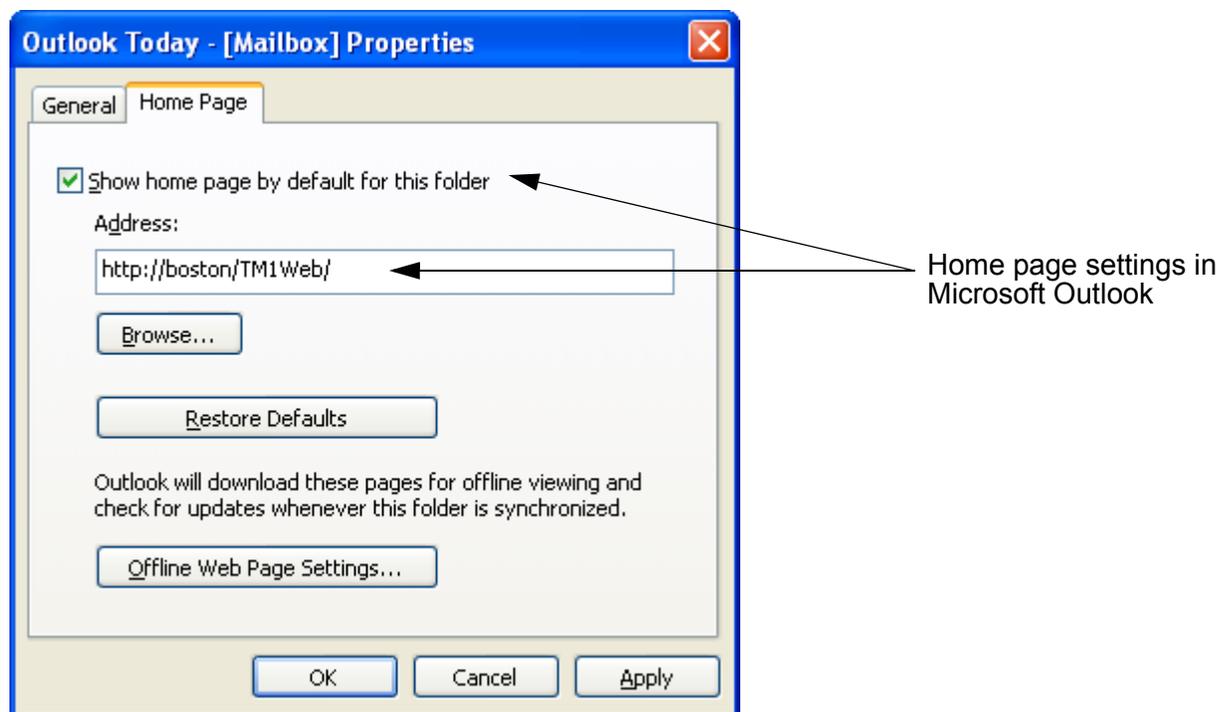Click on an Outlook folder to display its default home page

Setting a Home Page in Microsoft Outlook

To set a home page for a Microsoft Outlook folder:

1. In Microsoft Outlook, right-click on a folder and select **Properties**.

   The Properties dialog box for the folder appears.

   NOTE: When assigning a default home page, use the Outlook Mailbox folder or an empty folder that does not contain any e-mail, otherwise Outlook will display the home page instead of your e-mails in the folder.

Home page settings in Microsoft Outlook

2. Click the **Home Page** tab.

3. Select the option **Show home page by default for this folder**.

4. Enter a URL in the **Address** box.

   To display the standard TM1 Web log in page, use the default URL:

   http://<*web server*>/TM1Web/

   To display a cube view or Websheet, use the TM1 Web URL API to create the required URL.

   For details about using the TM1 Web URL API, see the chapter "Developing Custom Web Applications with the URL API" in the *TM1 Developers Guide*.

5. Click **OK** to close the **Properties** dialog box.

After you configure a home page for a folder, you can display the page by clicking on that folder.

For more details about configuring home pages in Microsoft Outlook, search Outlook Help for the following Help topics:

- "View your Web start page"
- "Add a Web page link to Favorite Folders"
- "Assign a home page to a folder"

Configuring TM1 Web to Display within Microsoft Outlook

If TM1 Web is not configured correctly, the following error messages appear when you use TM1 Web within Microsoft Outlook.

To configure TM1 Web to display correctly in Microsoft Outlook:

1. Open the TM1 Web web.config file in any text editor.

   This file is located in the installation directory for TM1 Web. Typically, this location is:

   C:\Inetpub\wwwroot\TM1Web

2. Locate the following line in the web.config file:

   <sessionState mode="InProc"
   stateConnectionString="tcpip=127.0.0.1:42424" sqlConnectionString="data
   source=127.0.0.1;Trusted_Connection=yes" cookieless="false"
   timeout="20" />

3. Change the value for the cookieless parameter from false to true.

```
<sessionState mode="InProc"
stateConnectionString="tcpip=127.0.0.1:42424" sqlConnectionString="data
source=127.0.0.1;Trusted_Connection=yes" cookieless="true"
timeout="20" />
```

4. Save and close the web.config file.

TM1 Web is now configured to display correctly within Microsoft Outlook.

Viewing and Using TM1 Web in Microsoft Outlook

When you view TM1 Web in Microsoft Outlook and then click on a different Outlook folder, the following warning message appears.

- To log out of TM1 Web, click **OK**.
- To keep working in TM1 Web, click **Cancel**. You will *not* be logged out of TM1 Web, but the contents of the other folder appears. To return to TM1 Web you must click on the original folder that displays TM1 Web. At this point, the same warning message appears again and you must click **Cancel** a second time to re-display TM1 Web.