

## Using Excel with Analysis and Concur Intelligence

Q) I cannot get a report to open in Excel. How can I ensure that the report will open in Excel?

There are several reasons that a report will not open in Excel. The reasons and resolutions are as follows:

**Scenario 1:** You are unable to run reports in Excel format, but PDF and HTML reports work. You have the Yahoo or Google toolbar installed.

The Yahoo or Google Pop-up blocker is treating the report as a pop-up. You need to uninstall the Yahoo or Google toolbar, disable the Pop-up blocker, and then view the blocked pop-up or allow the pop-up for the Cognos web site.

1. To disable the Pop-up blocker, click the **Pop-ups** icon and clear the **Enable Pop-up Blocker** checkbox.
2. To view recently blocked pop-ups, click the **Pop-ups** icon, and go to **View Recently Blocked Pop-ups**. Allow pop-ups from the Cognos web site.

If the above does not work, press the CTRL key while launching the Excel format. The CTRL key should override any hidden pop-up blocker in the system and will allow the Excel window to open.

If the issue is still not resolved, follow the steps below:

1. Open **Internet Explorer**.
2. Click **Tools**.
3. Click **Internet Options**, and then click the **Security** tab.
4. Click the **Local Intranet** icon.
5. Click **Sites**, and then click **Advanced**.
6. Type in the Cognos Connection URL, and then click **Add**.
7. Click **OK**.

**Scenario 2:** You cannot open or save Excel reports from within Cognos Connection. The pop-up prompt to Open, Save, or Cancel does not appear or flashes on the screen briefly.

This will occur in the Windows and Internet Explorer environment when a setting is blocking the prompts.

To enable automatic prompting for file downloads:

1. Open **Internet Explorer**.
2. Click **Tools**, and then click **Internet Options**.
3. Click the **Security** tab.
4. Click **Internet**.
5. Click **Custom Level**.
6. Verify that **Automatic prompting for file downloads** and **File download** are selected.
7. Click **OK**.
8. Repeat steps for **Intranet** and **Trusted Sites**.

**Scenario 3:** You have installed Internet Explorer 7 and cannot open a report in Excel. The Save and Open windows do not appear and you cannot open or save reports. All other users have installed Internet Explorer 6 (SP1 or SP2) and they do not encounter any issues with Excel.

This will occur in the Windows XP SP2 and Internet Explorer 7.0 environment. You need to modify some of the security settings to allow the Excel Open and Save pop-ups. You will also need to verify Internet Options and Security settings.

**Note:** There are multiple versions of Excel output to allow for backwards compatibility, including:

- CSV - raw data, no formatting, only possible with single Query reports. Delivered in email as a .CSV file.
- Excel 2000 – each report page is rendered to its own Excel 2000 worksheet, in a single Excel 2000 workbook. Delivered in email as an .HTML file(s) plus a single .xls file.
- Excel 2000 Single Sheet - all report pages rendered to one Excel 2000 worksheet. Delivered in email as an .HTML file(s).
- Excel 2002 - each report page is rendered to its own Excel 2002 worksheet, in a single Excel 2002 workbook. Delivered in email as a .MHT file.
- Excel 2007 - each report page is rendered to its own Excel 2002 worksheet, in a single Excel 2002 workbook. Delivered in email as an .XLSX file.

**Q) Excel files that I receive via email open in Internet Explorer, instead of just Excel.**

Unless you select the Excel 2007 format, Excel files are delivered via email as .HTML and .MHT files (supported Excel file types) instead of .XLS files for several reasons:

- The .XLS format is proprietary to Microsoft.
- .XLS files are prone to macro viruses and, as such, are blocked by many email servers.
- Using HTML/MHT files (supported Excel file types) permits users, who do not have Excel installed locally, to view the files.

You will not receive .XLS files via email. Instead, you will receive .HTML or .MHT files depending on which version of Excel you are using (HTML for Excel 2000 and MHT for Excel 2002). Cognos 8 uses a Microsoft-supplied open document standard that effectively embeds the Excel format into an HTML or MHT document.

For the .HTML email attachments, you can double-click the HTML file and open it in Internet Explorer. You can then, from the **File** menu, click **Edit with Microsoft Office Excel**. Alternatively, you can save the email attachment and give it an XLS extension.

You can open .MHT email attachments directly in Excel. By default, Windows may associate .MHT files with Internet Explorer. You can change this by:

1. Save the .MHT file locally to your machine.
2. Right-click on the file, point to **Open With**, and then click **Choose Program**.
3. Select **Microsoft Office Excel** from the list.

After performing these steps, you can then double-click the .MHT file to open it in Excel.