Setting Security Options for Excel Reports

This is a training guide to step you through setting your Internet security options for Excel report format. **NOTE:** There are 3 options available to bypass the pop-up blockers. We have found that one option may not work, where another will. We recommend that you try each option until you find the one that works for you. If you continue to run into problems contact the Help Desk.

**Before you begin . . .**

**When is this used?**
When you need to generate reports from Cognos in an Excel format. This setting allows your Excel report output to bypass pop-up blocker software and open in a new window. This guide walks you through the steps in Internet Explorer v. 7

You will need to be comfortable accessing Internet browser options to complete this guide. If for some reason you are not comfortable performing these steps, contact your IT administrator for assistance.

**Who has access?**
Central Offices; Department Administrators; Research Administrators; Business Administrators; Deans Offices / School Administrators

**Upon completion of this guide, you should be able to:**
- Set the reporting website as a trusted intranet site
- Set the reporting website to allow pop-up blockers
- Perform a keyboard stroke

**Where to get help?** For assistance, contact NUIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu.

**Additional Resources:** Project Cafe website is located at [http://cafe.northwestern.edu](http://cafe.northwestern.edu).
Option 1: Add the Reporting Website as a Trusted Intranet Site

Step 1a: Open a browser window

1. Click **Tools** from the browser window toolbar.

2. Select **Internet Options**.
Step 2: Select the Security Tab in Internet Options

2a: Select Local Intranet

2b: Select Sites button
Step 3: Select Advanced for local intranet

Select Advanced.
Step 4: Add the website address as a trusted site

4a: Type in the website address.  
http://reporting.northwestern.edu

4b: Click Add.

4c: Click Close.
Option 2: Add the Reporting Website to Allow Pop-up Blockers

Step 1: Open a browser window

1. Click **Tools** from the browser window toolbar.
2. Select **Internet Options**.
Step 2: Select the Privacy tab in Internet Options

2a: Select Privacy

2b: Check the box to Turn on Pop-up Blocker

2c: Select Settings
Step 3: Add website to allow pop-up blockers

4a: Type in the website address. reporting.northwestern.edu

4b: Click Add.

4c: Click Close.
Option 3: Perform a Keystroke to Bypass Pop-up Blockers

This option should be used on an as needed basis. If you plan to generate reports frequently in Excel you may want to perform one of the first two options which would store the setup. This option should be used if generating reports infrequently or if the first two options do not work. It may also be needed in combination with the first two options. If you have any questions please contact the Help Desk.

Step 1: Holding down the CTRL key, select the Excel format

If you are using a Mac, you will need to hold down both the Ctrl and Alt keys. You will have to hold down the key(s) until you are prompted by the File Download message box.
Step 2: Release the key(s) when the File Download message box appears
Select Open or Save from the File Download message box. If you want to save this report in excel to your local machine, we recommend doing so from this message box.