



## Creating a Personalised Page (Tab)

A personalised page can be created giving the advantage of choosing information that is most important to the user. Links to reports as well as web pages can be created. The content and look of the page can also be customised.

1. Click the **New Page** icon to display the screen below.



The dialog box is titled "Specify a name and description - New page wizard". It contains the following fields and controls:

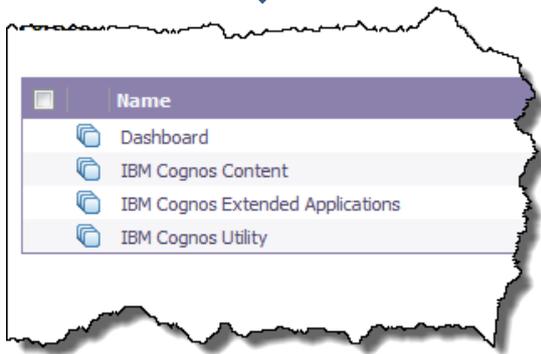
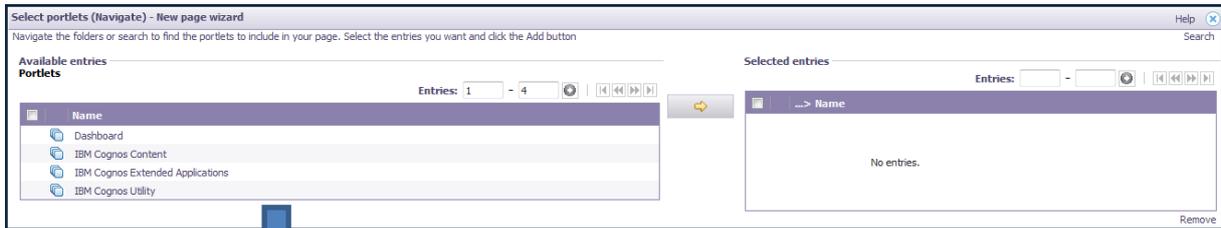
- Name:** A text input field containing "My Home Page".
- Description:** A large text area.
- Screen tip:** A text input field.
- Location:** A dropdown menu showing "My Folders" and "Select another location...".
- Buttons:** "Cancel", "< Back", "Next >", and "Finish".

2. Complete the Name field for the tab.
3. Click **Select My Folders** as the location for saving this page, and **My Folders** should then appear under **Location**.
4. Click **Next** to define the layout for your page. This is where you can specify the number of columns and widths. In this example two columns have been selected.

The dialog box is titled "Set columns and layout - New page wizard". It contains the following fields and controls:

- Number of columns:** A row of icons representing different column layouts. The two-column layout is selected.
- Content:** A section for defining the layout of the page content.
- Column width:** Two dropdown menus, both set to "50%".
- Layout options:** A checkbox labeled "Allow specified column width to dynamically adjust to content width." which is currently unchecked.
- Buttons:** "Cancel", "< Back", "Next >", and "Finish".

To customise each column, click **Add** at the bottom of the relevant column and the following screen will display.



**IBM Cognos Content:**

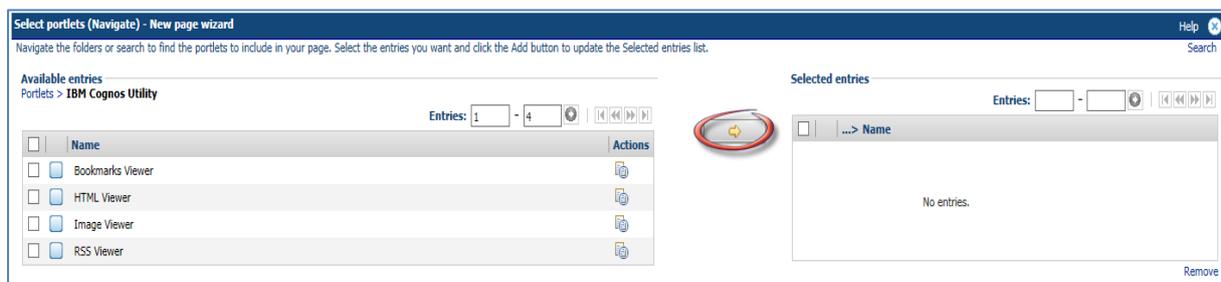
This is where you can create links to reports you use on a regular basis

**IBM Cognos Utility:**

This is where you can set up links to documents.

**Creating an IBM Cognos Utility section**

4. Click on **IBM Cognos Utility** and the following page will display.



Tick the boxes accordingly:

- a. **Bookmarks Viewer:** this will enable you to add links which will take you to the relevant page or document, e.g. reference guides, chapter in finance procedure manual
- b. **HTML Viewer:** this enables you to add links direct to other web pages, and the webpage will open inside your homepage

**NB:** Please do **not** set up a direct link to CUFS as when you next log into Cognos, you will automatically be taken straight to the CUFS log in screen and not to Cognos. To access Cognos again, a call will then need to be raised with the helpdesk.

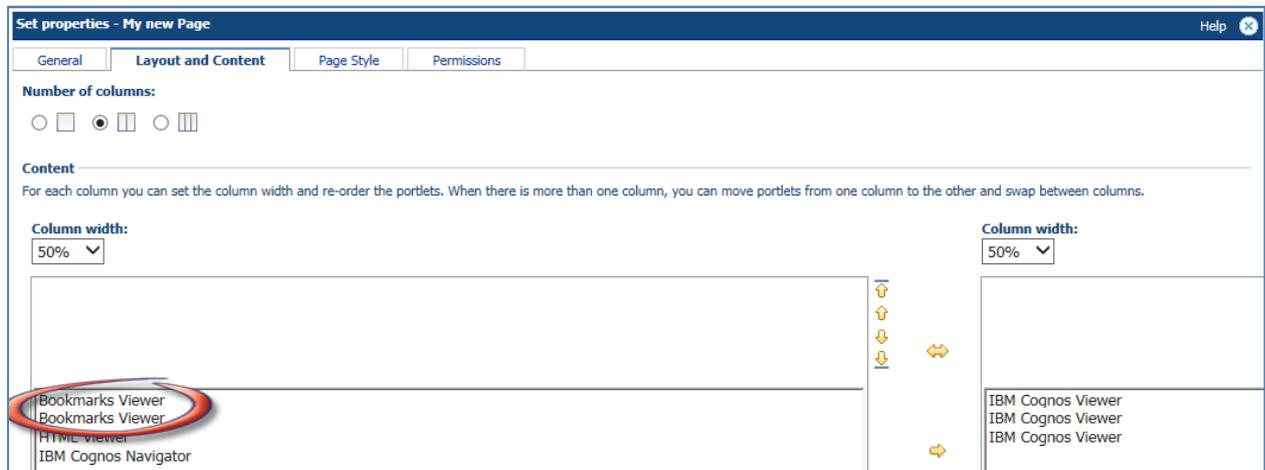
5. Click the **yellow arrow**  to move the description/s to the right hand box.



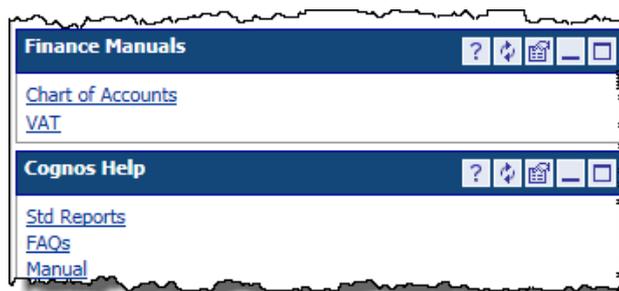
6. Click **OK** at the bottom of the page and the column screen will display with the link/s you have just added. If you don't wish to add any more section then proceed to step 15 to add your new page to your portal tabs.
7. If you wish to add links for any remaining columns, click on the **Add** button for that column and either click on **IBM Cognos Utility** again and repeat the above steps 6-9, or **IBM Cognos Content** and then follow steps 11-13 below.

In order to lay out your home page, you will need to decide on the section headers you require. For each new section, you will need to **Add** either a Bookmarks Viewer or HTML Viewer. There is no restriction on number of additions.

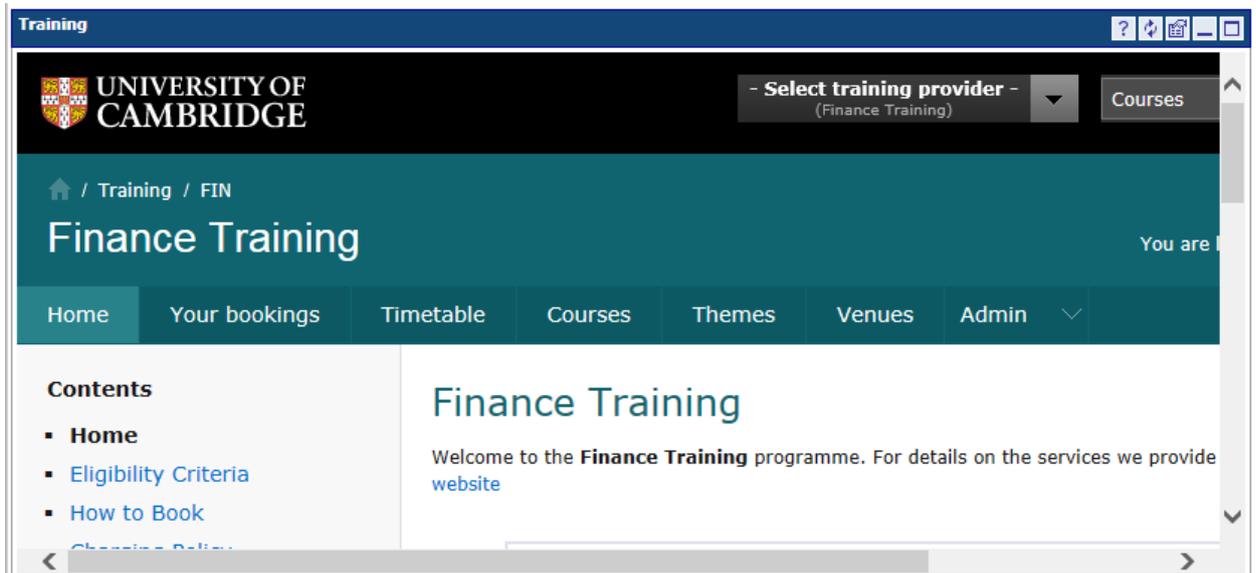
### Example



Example of homepage after content added to **Bookmarks Viewer**:

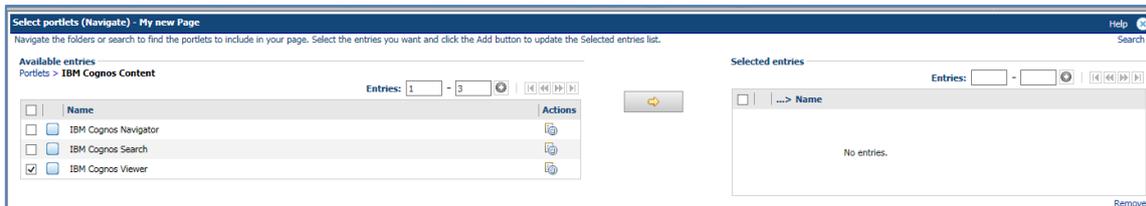


If you select the **HTML viewer** in Step 5, it will display on you page as follows,once you have added content:



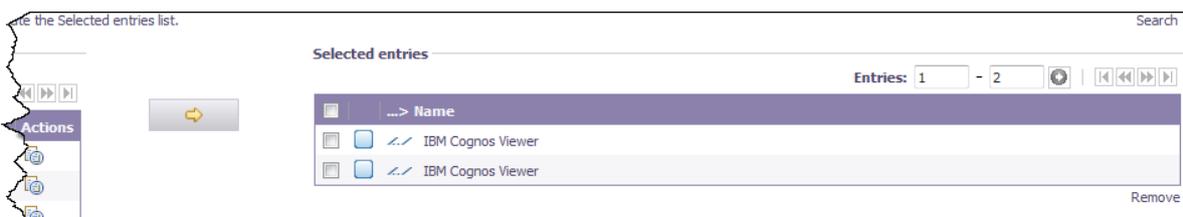
## Creating an IBM Cognos Content section

- Following step 5, click on **IBM Cognos Content**, and select **IBM Cognos Viewer**. The viewer enables you to display the report parameter screen of the selected report directly on your Homepage.



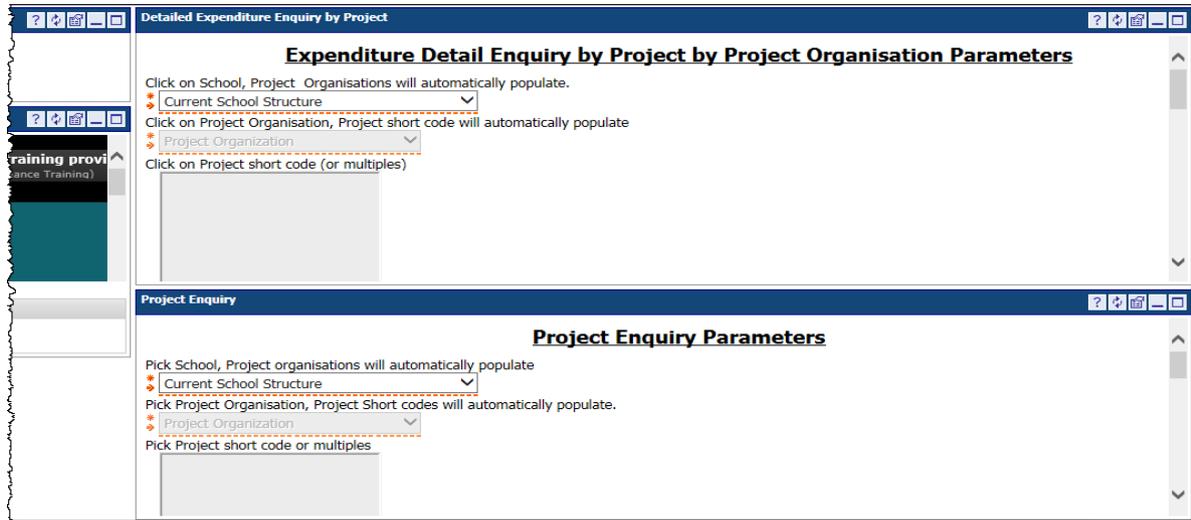
Click the **yellow arrow**  to move the description/s to the right hand box.

- Repeat step 9 for each report that you wish to shortcut to (example screen shot below)

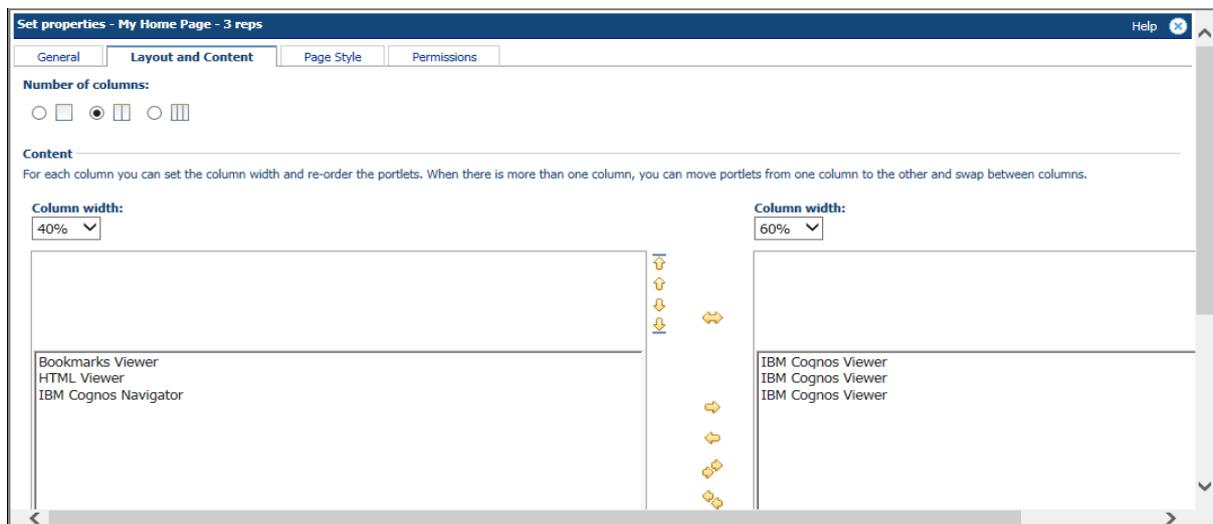


- When finished, click **OK** and the column screen will display with the link/s you have just added.

Example of homepage after content added to **Cognos Content**.



To add content, see *Adding content to your personalised page*. Before content is added, your homepage will contain the selected layout only. This can be edited at any time.



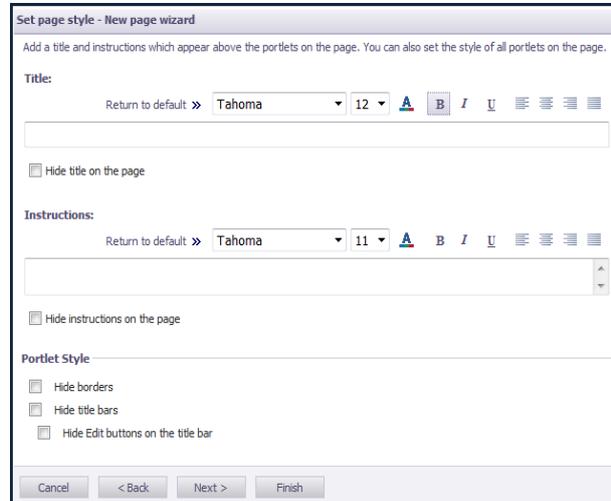
**NB:** If you choose to add the **IBM Cognos Navigator**, available as a **Cognos Content** option, the **Public Folders** and **My Folders** tabs will be displayed.



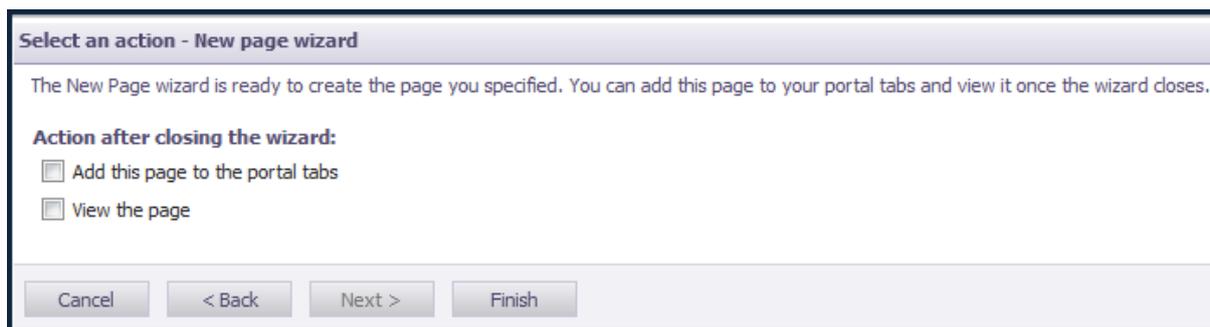
## Adding the new page as a portal tab

Once columns have been created, you can either add the content and then complete the remaining steps, or complete now, and add content later:

11. Click **Next** to display the **Set Page Style** Screen. This is where you can enter in a title for your page and set the font (this will be the title that appears on the page, not the title of the tab).



12. Click **Next**, and the following screen will display.



13. Click **Add this page** to the portal tabs and **Finish**. Navigate to the newly created tab.



You may want to set your customised tab as your home page so that all information that is important to you is displayed on the screen as soon as you log in.

## Setting your new tab to be your home page

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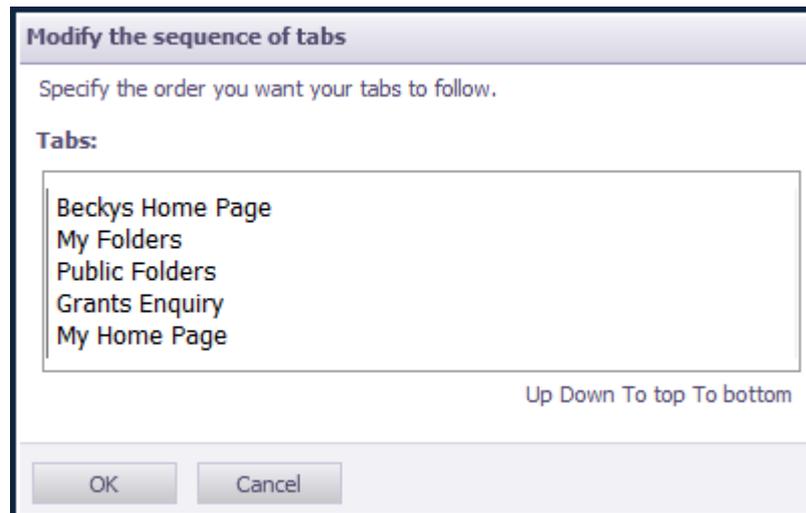
14. Click on the **Tab Menu** icon



**NB:** If the page is not added to the tabs, select the relevant page, and click



15. Select **Modify the sequence of tabs ....** to display this screen



16. Click on the page you created e.g. *My Home Page*.

17. Click **To Top** (whichever tab is at the top of the list becomes the home page).

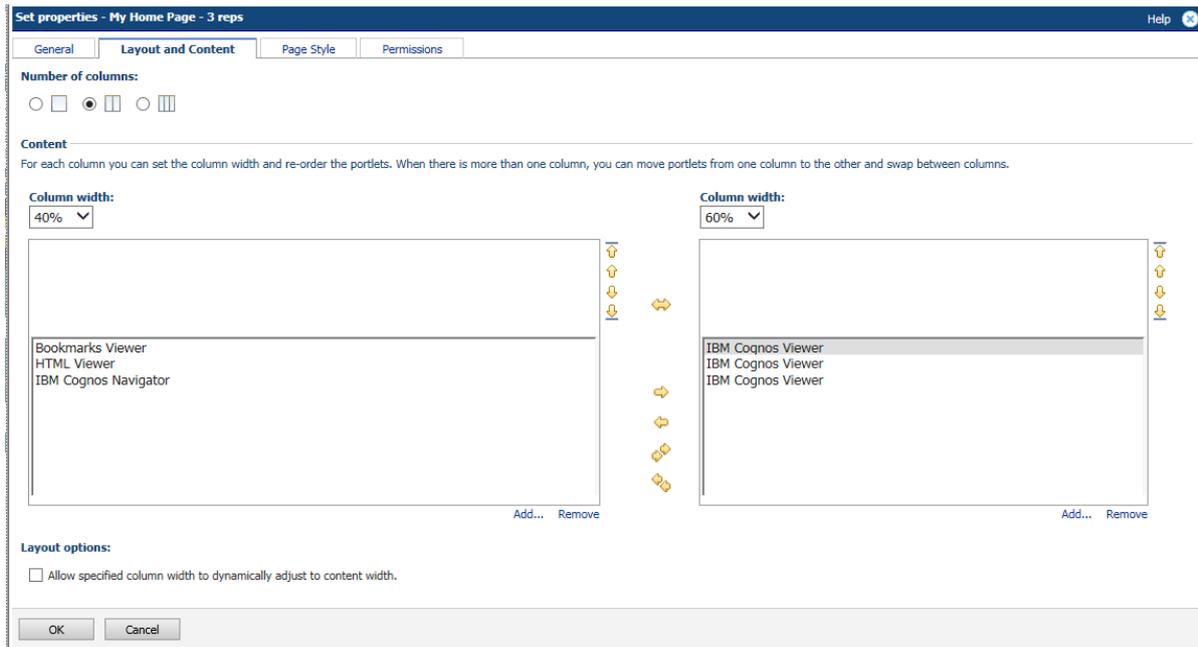
18. Click **OK**

Your personalised screen is now the home page.

If you haven't done so already, the next step is to add content to the new tab. Refer to Section 11.



**Top Tip:** Once you have created your personalised page and added links you can then move the sections around to a look that suits you by clicking on the **Page Edit** button and using the yellow arrows to move sections across, up and down. You can edit any of your pages in this way.



## How to delete a personalised tab

19. Ensure you are *on the tab* you wish to delete and click on the **Tab Menu** icon



20. The following options will display.

Click on **Remove this tab**.

It will no longer display as a tab but will remain in **My Folders**, which is where you can select and delete it.

