

1.

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.

Specify a nar	ne and description - New page wizard
Specify a name	and location for this entry. You can also specify a description and screen
Name:	
My Home F	Page
Description	:
	×
Screen tip:	
Location	
My Folders	
Select anothe	r location

- 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.

Set columns and layout - New page wizard				Help 🙁	
Specify rumber of columns and layout the portlets that you have chosen. To customize the portlet, view the page once you dose this wizard.					
Number of columns:					
Content					
For each column you can set the column width and re-order the portlets. When there is more than one column, you can move portlets from one column	n to the	other and	swap between columns.		
Column width:			Column width:		
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		~		-	
		~			
		<i>•</i>			
		00			
		\$ \$			
Add Remove			Add Remove	e	
Layout options:					
Allow specified column width to dynamically adjust to content width.					
Cancel < Back Next > Finish					

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

Name Image: Select the entries you want and dok the Add button Selected entries Valiable entries Entries: 1 - 4 • • • • • • • • • • • • • • • • • •	Select portlets (Navigate) - New page wizard	Help 🛞
Voluble entries Entries: 1 - 4 Selected entries Image: Cognos Content: Entries: 1 - 4 Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Utility Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cognos Content: Image: Cogno	Navigate the folders or search to find the portlets to include in your page. Select the entries you want and click the Add button	Search
Name Image: Dashboard Image: Dashboard <t< th=""><th>Available entries Portlets Entries: 1 - 4 0 (4(4)))</th><th>Selected entries @ (((())))</th></t<>	Available entries Portlets Entries: 1 - 4 0 (4(4)))	Selected entries @ (((())))
IBM Cognos Extended Applications This is where you can set up links to documents.	Entries: 1 - 4 Entries: 1 - 4 Entrie	Moentries. No entries. Remove Moentries. Remove Remove Re

Creating an IBM Cognos Utility section

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

Select portlets (Navigate) - New page wizard							Help 🛞
Navigate the folders or search to find the portlets to include in your page. Select the entries	s you want and click the Add button to update the Selecter	d entries list.					Search
Available entries Portlets > IBM Cognos Utility			Selected entries		Entries: -	0	
	Entries: 1 - 4		> Name				
Name Name	Actions						
Bookmarks Viewer	lig						
HTML Viewer	6			No entries.			
Image Viewer	6						
RSS Viewer	6						
							Remove

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.

{		Help 💌
tries list.		Search
Ş	Selected entries	Entries: 1 - 2
ζ 🗢	🔲 🛛> Name	
<	🔲 📄 🥢 Bookmarks Viewer	
ζ	🔲 🔲 🥢 HTML Viewer	
5-3		Remove
٤		

- 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.
- 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.

Set properties	- My new Page									Help 😣
General	Layout and Content	Page Style	Permissions							
Number of col	umns:									
0										
Content For each column	n you can set the column widtl	n and re-order the p	ortlets. When there	s more than one	e column, you can m	ove portlets from one c	olumn	to the othe	er and swap between columns.	
Column widt 50% ✔	h:								Column width:	
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							υ Φ	\Leftrightarrow		
Bookmarks	Viewer Viewer						-		IBM Cognos Viewer IBM Cognos Viewer IBM Cognos Viewer	
IBM Cogno	s Navigator							\$		

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

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Finance Manuals	? 🌣 🛍 🗕 🗆
Chart of Accounts VAT	
Cognos Help	? 🏼 🗖 🗖 🗖
Std Reports FAOs Manual	

Example

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**

8. 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.

Select portlets (Navigate) - My new Page				Help 🛞
Navigate the folders or search to find the portlets to include in your page. Select the entri	ies you want and click the Add button to update the S	elected entries list.		Search
Available entries Portlets > IBM Cognos Content			Selected entries	Entries: - O   KKID
- Name	Actions	\$	□  > Name	
IBM Cognos Navigator	6			
IBM Cognos Search	6		No entries.	
IBM Cognos Viewer				
				Pemoie

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

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

te the Selected	l entries list.			Search
		Selected entries	Entries: 1 - 2	
	⇒	🔲> Name		
Actions		IBM Cognos Viewer		
		IBM Cognos Viewer		
				Remove

10. 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.

? \$ 🗃 💶 🗆	Detailed Expenditure Enquiry by Project	? 🌣 📸 💶 🗆
? 杂 爾 _ □ Taining provi ance Training)	Expenditure Detail Enquiry by Project by Project Organisation Parameters	^
	Project Enquiry	✓
}	Project Enquiry Parameters	^
	Pick School, Project organisations will automatically populate Current School Structure Pick Project Organisation, Project Short codes will automatically populate. Project Organization Pick Project short code or multiples Pick Project short code or multiples	
		$\sim$

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.



General       Layout and Content       Page Style       Permissions         Number of columns:       Image: Style       Permissions         Content       Image: Style       Image: Style       Image: Style         For each column you can set the column width and re-order the portlets. When there is more than one column, you can move portlets from one column to the other and swap between columns.         Column width:       Column width:       Column width:         40% v       Image: Style       Image: Style       Image: Style         Bookmarks Viewer       Image: Style       Image: Style       Image: Style         HTML Viewer       Image: Style       Image: Style       Image: Style         IBM Cognos Navigator       Image: Style       Image: Style       Image: Style	t properties - My Home Page - 3 reps				Help 🛞
Number of columns: <ul> <li>Image: Content</li> <li>For each column you can set the column width and re-order the portlets. When there is more than one column, you can move portlets from one column to the other and swap between columns.</li> </ul> Column width: <ul> <li>40% ✓</li> <li>60% ✓</li> <li>60% ✓</li> <li>IBM Cognos Viewer</li> <li>IBM Cognos Navigator</li> <li>IBM Cognos Viewer</li> </ul>	General Layout and Content Page Style Permissions				
<ul> <li>              ● □ ● □ ● □      </li> <li>             Eoremt         </li> <li>             For each column you can set the column width and re-order the portlets. When there is more than one column, you can move portlets from one column to the other and swap between columns.      </li> <li>             Column width:             </li> <li>             do% ✓             </li> </ul> <li>             Bookmarks Viewer         <ul> <li>             HTML Viewer             IBM Cognos Navigator             </li> <li></li></ul></li>	lumber of columns:				
Content         For each column you can set the column width and re-order the portlets. When there is more than one column, you can move portlets from one column to the other and swap between columns.         Column width:					
For each column you can set the column width and re-order the portiets. When there is more than one column, you can move portlets from one column to the other and swap between columns.  Column width: 40% ✓  Bookmarks Viewer HTML Viewer IBM Cognos Navigator	ontent				
Column width:     Column width:       40% ✓     60% ✓       Bookmarks Viewer     9       HTML Viewer     9       IBM Cognos Navigator     4	or each column you can set the column width and re-order the portlets. When there is more than one column,	you can r	nove portle	ts from one column to the other and swap between columns.	
40% ✓       60% ✓         Bookmarks Viewer       IBM Cognos Viewer         HTML Viewer       IBM Cognos Viewer         IBM Cognos Navigator       IBM Cognos Viewer         IBM Cognos Viewer       IBM Cognos Viewer	Column width:			Column width:	
Bookmarks Viewer       HTML Viewer       IBM Cognos Navigator	40% 🗸			60% 🗸	
Bookmarks Viewer HTML Viewer IBM Cognos Navigator     IBM Cognos Viewer IBM Cognos Viewer IBM Cognos Viewer       IBM Cognos Viewer     IBM Cognos Viewer       IBM Cognos Viewer     IBM Cognos Viewer		Ŷ			
Bookmarks Viewer HTML Viewer IBM Cognos Navigator Bookmarks Viewer HTML Viewer IBM Cognos Viewer IBM Cognos Viewer IBM Cognos Viewer IBM Cognos Viewer IBM Cognos Viewer		Û			
Bookmarks Viewer HTML Viewer IBM Cognos Navigator Cognos Navigator		<b>Å</b>	$\Leftrightarrow$		
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IBM Cognos Navigator	Bookmarks Viewer			IBM Cognos Viewer	
	IBM Cognos Navigator		-	IBM Cognos Viewer	
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			Q.,		

**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.

IBM Cognos Navigator	? 🗘 🗃 🗖 🗖
Cognos	
Name 🗘	Actions
Public Folders →	
My Folders →	

## 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.

Select an action - New page wizard								
The New Page wizard is ready to create the page you specified. You can add this page to your portal tabs and view it once the wizard closes								
Action after closing the wizard:          Add this page to the portal tabs         View the page								
Cancel < Back Next > Finish								

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

IBM Cognos Connection	rad53 <u>Loa Off</u>   ♣   <b>8 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 </b>
My Folders Public Folders My Home Page	
Bookmarks Viewer	IBM Cognos Viewer ?
Click the edit button to customize.	Click the edit button to customize.
HTML Viewer	IBM Cognos Viewer ?
Click the edit button to customize.	Click the edit button to customize.

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

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

Modify the sequence of tabs	
Specify the order you want your tabs to follow	<i>ı</i> .
Tabs:	
Beckys Home Page My Folders Public Folders Grants Enquiry My Home Page	
	Up Down To top To bottom
OK Cancel	

- 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.

Set propertie	s - My Home Page - 3 reps								Help 😣
General	Layout and Content	Page Style	Permissions						
Number of o	olumns:								
0									
For each colur	mn you can set the column width	n and re-order the po	ortlets. When there i	s more than one column,	ou can	move portl	ets from one column to the other and swap between colum	ns.	
Column wi	dthe						Column width		
40% V	]						60% V		
	1								
					Ŷ				U U
						~			
					₽	<b>~</b> ~			₽
Bookmark	ks Viewer						IBM Cognos Viewer		
HTML Vie	wer Navigator						IBM Cognos Viewer		
1						$\Rightarrow$			
						¢			
						\$ [©]			
						<b>\$</b> 6			
1				Add Remov			1	Add Rer	nove
					-			Addin Tea	
Layout optio	ons:								
Allow spe	ecified column width to dynamic	ally adjust to conten	t width.						
OK	Cancel								

## 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.

Add tabs...

Remove this tab

Edit this page...

Modify the sequence of tabs...